

Halal, New Zealand!

**An Exploratory Study into the halal-friendliness of
Accommodation Providers in New Zealand**

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Abstract

The world is experiencing a rise in the number of international halal tourists, travellers who choose to abide by the guidelines of the Islamic religion with respect to appropriate behaviours whilst travelling. This study explores the halal friendliness of New Zealand's accommodation providers in Auckland and Rotorua. A content analysis of websites coupled with a secret shopper were utilised to achieve the goals of this study. An inquiry into the curricula of New Zealand's tertiary institutions was also employed in order to determine the status of halal food preparation training. The study found that while very few accommodation provider websites mention halal, when contacted directly through the secret shopper, providers were substantially more aware of the needs of halal tourists and many were able to provide halal friendly services. The results shed insights into the halal accommodation attributes available to Muslim travellers in New Zealand as well as a means by which halal friendly accommodation and hospitality could be improved.

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Please detail the nature and extent (%) of contribution by the candidate:

The candidate contributed to the method used in the assessment of accommodation provider websites

The candidate provided an initial set of raw results from the content analysis which was subsequently modified by Professor Hall who also wrote the first version of the text, including the literature review and figure, and who is corresponding author on the paper.

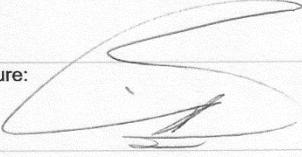
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Chapter One: Introduction

Tourism is one of the major industries in the world. According to the World Travel and Tourism Council (2016), revenue from tourism expenditure contributes 9.8 per cent to the world's gross domestic product (GDP). There are many segments of the tourism industry each defined by the needs and purpose of the travel such as beach tourism (BBC, n.d.) and medical tourism (Hotel & Resort Insider, n.d.). A growing segment of the tourism industry is called halal tourism (Henderson, 2010). Halal tourism is when a Muslim traveller chooses to abide by their faith and its teachings whilst travelling and lodging abroad. According to some authors, e.g. Wilson and Liu (2011) and Bon and Hussain (2010), the concept of halal tourism is proving to be popular and is an opportunity on which many hospitality providers have seen potential to capitalise by providing halal-friendly goods and services.

1. What is halal?

Islam is one of the world's largest religions. According to the World Factbook, almost 23.2% of the world's population is an adherent of Islam. A follower of Islam is called a Muslim. Muslims live their lives in accordance with the instructions that are set out in the *Quran* (Islam's holy book), as they believe that the Holy *Quran* is the word of Allah (God in Arabic).

The word halal is an Arabic word for permissible, and is used to refer to everything that is permissible for a practicing Muslim. Conversely, the word haram, the Arabic word for forbidden, is used to signify the things that are forbidden for a Muslim to consume or engage in. The source of what constitutes halal and haram is derived from the *Quran* and the prophet's Sunna (the teachings, words, and daily conduct of the Prophet Muhammed) (BBC, 2009). There are five primary duties each Muslim must satisfy in order to live a life according to the religion of Islam (BBC, 2009c). The five pillars of Islam (BBC, 2009b; Jafari and Scott, 2014) are:

- *Shahada*: a proclamation of faith.
- *Salat*: five daily prayers. The five prayers are *salat el-fajir* (dawn prayer), *salat el-dhuhur* (midday prayer), *salat el-asr* (late afternoon prayer), *salat el-maghrib* (past sunset prayer), and *salat el-isha'* (night prayer).
- *Zakat*: paying a proportion of a one's possessions to benefit the less fortunate.
- *Sawm*: fasting during the holy month of Ramadan. A few people are exempted from fasting during Ramadan including travellers.
- *Hajj*: the pilgrimage to Mecca. Hajj is obligatory for each Muslim to perform at least once in their lifetime, as long as the Muslim is of sound mind and body and is financially able to do so.

The notion of halal encompasses all the aspects of Muslim's life. However, halal is widely associated with food and what is allowed to be consumed by Muslims. The *Quran* contains many food-related

verses outlining the permissible foods, such the *Ayah* (verse) mentioned in *Surat Al Maaidah* (The table) in the *Quran*:

All things suitable [for eating] have been permitted to you (5:4)

The *Quran* also highlights what is strictly forbidden. The following Ayah in *Surat Al Baqara* (The Cow) highlights food items that are considered haram:

Only carrion, blood, flesh of swine and that which is consecrated for anything other than God is prohibited for you. Even, in these things, whoever is driven by necessity, intending neither sin nor transgression, there shall be no sin upon him. Indeed God is extremely Forgiving, Eternal in mercy (2:173).

A list of food items that Islamic jurists have deemed as haram was compiled by Bon and Hussain (2010), such as animals with long pointed tusks or fangs, birds of prey, and animals that are strictly forbidden from being killed in Islam such as the hoopoe and the honeybee.

However, the *Quran* also outlines activities that are considered haram. Of significance to the hospitality industry for example, the *Quran* mentions that gambling and the consumption of alcohol are considered haram, as mentioned in *Surat Al-Maaidah*:

O ye who believe! Intoxicants (all kinds of alcoholic drinks), gambling, Al-Ansab, and Al-Azlam (arrows for seeking luck or decision) are an abomination of Shaitan's (Satan) handiwork. So avoid (strictly all) that (abomination) in order that you may be Successful.(5:90)

Therefore, a Muslim must be watchful as to what products they consume and what sources they come from so as to abide by the rules set out in the *Quran* and to ensure what they are consuming is halal. This is particularly of relevance to Muslim travellers when they are visiting destinations such as Europe and New Zealand, where the hospitality industry does not specifically cater for Muslim visitors.

Not surprisingly, the concept of Halal also extends into the realm of the tourism industry. Carboni et al. (2014) state that halal tourism has found a favouring amongst Muslim travellers who prefer to choose goods and services that follow the Islamic teachings so as to abide by *Sharia* (a set of rules derived from the *Quran* and the Prophet's (peace be upon him) Sunna that dictate the daily lives and practices of Muslims (BBC, 2009c)) whilst travelling.

1.1 The growth of halal tourism

Halal tourism has also been the subject of international meetings to discuss the potentials of the emerging tourism trend. The Organisation of Islamic Cooperation (OIC) held the first international forum on Islamic tourism in 2014 to discuss the business potential and development of halal tourism globally and the growth opportunities (DinarStandard, n.d.). Halal Expo Europe is an opportunity for individuals who are interested in the development of the halal industry in Europe (Halal Expo Europe,

n.d.). The continent of Europe is home to a sizeable Muslim population with a high purchasing power, and many global businesses offer products that are of interest to this population (Halal Expo Europe, n.d.). Such businesses offering halal products can showcase their goods and service at this expo (Halal Expo Europe, n.d.). Africa is also planning to hold a halal conference in 2016 to discuss the economic benefits and partnership between African countries and halal businesses (African Halal Forum, n.d.). This conference was labelled the African Forum on Halal Business, and will hold its inaugural meeting in Senegal (African Halal Forum, n.d.).

The “World Halal Travel Summit and Exhibition” is another example of tourism sector members ranging from companies to government officials to discuss new ways to develop halal tourism and set the criteria for the future of the industry (TTGMENA, 2015). Visitors and delegates that attended the summit came from around the globe (TTGMENA, 2015). Another summit is planned for 2016 entitled “World Halal Tourism Summit” and will be held in Abu Dhabi (World Halal Tourism Summit, n.d.). A “Halal Tourist Congress” will also be held in Europe with the Halal Expo Europe in the Dutch city of Eindhoven (NBI International, n.d.). The increasing number of summits and conferences highlights the growth of both Islamic and non-Islamic business interest in this field.

Crescentrating, a consultancy firm set up in 2009 to advise businesses on making their offerings more halal friendly in order to attract Muslim clientele, has now grown to become the world’s leading authority in halal travel offering halal certification to hospitality vendors (Crescentrating, n.d.b). Crescentrating has also partnered with MasterCard and developed the Global Muslim Travel Index (GMTI), a global index released annually ranking halal-friendly travel destinations (Crescentrating, n.d.a) (see Table 1.1).

CrescentRating has also developed a service for Muslim tourists called HalalTrip (Lukman, 2014). HalalTrip allows tourists to book flights, accommodation, and tours online (Lukman, 2014). With over 380,000 accommodation providers featured on the website (Yap, 2013), HalalTrip draws on CrescentRating’s database of halal services and destinations to recommend appropriate services and products to the tourist based on halal-friendliness (Lukman, 2014). Another popular online booking website is Halalbooking (Diaa, 2015). The website, which is based in the United Kingdom, allows consumers to filter search results such as hotels that do not serve alcohol and hotels that serve halal food (Diebelius, 2015). The majority of Halalbooking’s users are based in Europe (Diaa, 2015).

There is also an increase in the number of mobile apps targeted at Muslim travellers (Diebelius, 2015). HalalTrip released a free mobile app that has all the features of the HalalTrip website as well as a prayer time calculator and direction to Mecca indicator (Arabian Business, 2015). The app also has a feature for spotting halal food (Cosseboom, 2015). As the availability of halal food is vital for Muslim travellers, the halal food spotting feature allows users to find halal food whilst travelling, and also to document the food they encounter and share it with other Muslim travellers via social media

(Cosseboom, 2015). Another halal-travel oriented app available is Halal Gems, which is a directory of restaurants offering halal food in London and Dubai (Diebelius, 2015). Irhal is an app that lists mosques and places worth visiting for tourists (Diebelius, 2015; Mohsin et al., 2015). HalalMinds is a free mobile app that lists all the places in Japan offering halal Japanese food (Quigley, 2014). The Tourism Authority of Thailand also launched an app aimed at Muslim tourists visiting its shores and is intended to aid tourists to find halal food outlets and locating areas for prayer (Reuters, 2015).

Table 1.1 CrescentRating-MasterCard GTMI Ranking of the top 50 halal friendly nations in 2015

Rank	Country	Rank	Country
1	Malaysia	26	Senegal
2	Turkey	27	Uzbekistan
3	United Arab Emirates	28	Tajikistan
4	Saudi Arabia	29	Lebanon
5	Qatar	30	South Africa
6	Indonesia	31	France
7	Oman	32	Belgium
8	Jordan	33	Hong Kong
9	Singapore	34	United States
10	Morocco	35	Spain
11	Brunei	36	Taiwan
12	Tunisia	37	Japan
13	Kuwait	38	Switzerland
14	Iran	39	Australia
15	Bahrain	40	India
16	Egypt	41	Bosnia and Herzegovina
17	Maldives	42	Sri Lanka
18	Kazakhstan	43	Russian Federation
19	Bangladesh	44	Germany
20	Thailand	45	New Zealand
21	Algeria	46	Netherlands
22	Azerbaijan	47	Albania
23	Pakistan	48	Philippines
24	Kyrgyzstan	49	China
25	United Kingdom	50	Tanzania

Note: Adapted from <http://gmti.crescentrating.com/mastercard-crescentrating-global-muslim-travel-index-2015-gmti2015.html>.

1.2 Halal tourism around the globe

The potential of halal tourism is also being realised globally. MasterCard (2015b) reports that in 2014, there were 108 million Muslim travellers. This number is expected to grow to 150 million Muslim travellers by the year 2020 (MasterCard, 2015b). Muslim travellers spent US\$140 billion on travel in 2014, and this is forecast to grow to US\$200 billion by 2020 (The Malaysian Insider, 2015). Hospitality industries internationally have begun to institute goods and services that cater to the needs of the halal

tourist hoping to emulate the popularity of halal food and financial services and to tap into the growing tourism phenomenon (Benner, 2015).

The offering of halal services is a way forward for nations that are hoping to attract Muslim visitors. For example, Shan (2014) mentions there is an increasing number of hotels in Taiwan offering halal food items at their restaurants in order to facilitate the travel of Muslim tourists to Taiwan. This was spurred by the introduction of direct flights between Dubai and Taipei by Emirates Airlines (Shan, 2014). Businessmen in Thailand have set up an airline that services Thailand's Muslim population to transport Thai pilgrims to and from Saudi Arabia and other holy cities (Fein, 2015). Destinations in Thailand are also implementing changes that accommodate the Muslim Traveller's needs such as shopping complexes that offer prayer rooms and the wider availability of halal food (Divecha, 2015).

Predominantly Muslim countries are also aiming to attract Muslim guests from other nations. Malaysia has been making strides in order to position itself as a major halal hub and received the top spot on the GMTI ranking in 2015 as the most halal friendly nation (MasterCard, 2015a), a title the country has won for five consecutive years (Yee, 2015). However, there are other destinations that are aiming to establish themselves as major halal tourism hubs, such as the emirate of Sharjah in the United Arab Emirates (UAE) (Bitar, 2015). Bitar (2015) notes that as an Islamic state Sharjah is already a Muslim-friendly destination where alcohol is not offered, and gender segregated facilities such as pools and gyms are available. Other emirates in the UAE are trying to prove themselves as a major players in the halal tourism scene (Scott and Sahoo, 2015). According to CrescentRating and MasterCard's Muslim Travel Shopping Index 2015, Dubai was ranked as the top shopping destination for Muslim travellers (Scott and Sahoo, 2015). There is an increasing number of organisations in Dubai that are producing services targeted at Muslim travellers, such as Dnata travel which has organised tours aimed at Muslims (Scott and Sahoo, 2015). An Ajman based hotel group is developing a number of sharia-compliant properties in the emirate of Ajman (Scott and Sahoo, 2015). An Abu Dhabi hotel group has recognised the need for more Muslim-friendly accommodation in the emirate and had developed a number of accommodation providers that cater to Muslims and is planning on developing similar accommodation providers in the emirates of Sharjah and Fujairah (Scott and Sahoo, 2015).

Some hoteliers in Indonesia are showing their commitment to support the Indonesian government's plans to grow the country's halal tourism and accommodate to the increasing number of Muslim tourists arriving from neighbouring countries as well as domestic Muslim tourists (The Jakarta Post, 2015). The country has allocated a portion of its tourism promotional funds to promote halal tourism (The Jakarta Post, 2015). The country has many Muslim-friendly destinations, including the province of Aceh, which has a major Muslim population and many of its mosques are tourist attractions (The Jakarta Post, 2015). Lombok is another example halal-friendly destination, recently winning the top prize for being the world's best halal tourism and honeymoon destination (Nugrahani, 2015). Although, it is also

acknowledged that some facilities around Indonesia have to be renovated in order to attract tourists (The Jakarta Post, 2015).

Many non-Muslim nations are also recognizing the potential of halal tourism. Japan is an example of such a nation. Japan saw potential in halal tourism and implemented upgrades to their facilities to accommodate Muslim tourists (Nagu, 2015). This was done as Japan plans to grow and diversify its tourism industry, which has long been dependent on South Korean and Chinese tourists, by the year 2020 (Nagu, 2015). Nagu (2015) mentions that some Japanese businesses have begun to cater to Muslim customers' needs, such as the case of the department store Takashimaya located in Tokyo, which has recently added a prayer room because of requests from customers. The prayer room comes complete with wash room and direction marker pointing to Mecca (Nagu, 2015). In order to keep Muslim travellers visiting Japan informed, the Japan National Tourism Organization (JNTO) has prepared guidebooks and special websites for Muslim tourists (Yee, 2015). There is evidence that these efforts of reaching out to the Muslim traveller is paying off, as Kyoto has recorded an upsurge of tourists from the Middle East, mainly from Gulf Cooperation Council (GCC) countries (TradeArabia, 2015). TradeArabia (2015) also mentions that the increase was noticed after Kyoto opened a promotional office in Dubai to create awareness of the city and the provision of detailed information in Arabic about halal Japanese cuisine and Muslim-friendly tourist activities.

Some nations are also targeting other sectors of the halal tourism and not only leisure or business travellers. South Korea has taken steps to entice more Muslim medical tourists from the Middle East (International Medical Travel Journal, 2015). According to the International Medical Travel Journal (2015) Muslim medical tourists spent the most money per person on medical services in South Korea compared to medical tourists from other nations. However, although the Muslim medical tourism shows high spending, the number of visitors is low, thus South Korean tourism agencies are taking steps in order to attract more Muslim tourists to its shores.

African nations are also realising the potential benefits of halal tourism. Zanzibar and South Africa are two prime locations that are capitalising on halal tourism in the eastern and southern parts of the continent (Dubai Chamber, 2015). The Tanzanian archipelago of Zanzibar is well positioned to attract halal tourist. The archipelago population is mostly Muslim and the islands have a rich Islamic culture (Al-Mukhtar, 2015). Middle Eastern tourists are attracted to Zanzibar's beautiful beaches and many food outlets (Al-Mukhtar, 2015). South Africa is another example. South Africa was rated third Muslim-friendly destination in 2013 (Mkhize, 2013). There is potential for significant growth of the halal tourism industry in South Africa especially in KwaZulu-Natal, as the country has many of the requirements to accommodate the halal tourist, such as tourist establishments having a separate halal kitchen and separate facilities for men and women (Mkhize, 2013).

The need to offer halal friendly services is being recognised by the hospitality industry in Western countries as well. The Spanish capital, Madrid, is experiencing an influx of Middle Eastern tourists arriving after Etihad and Emirates increased flights to the city (Rahman, 2015). In response to this increase in Middle Eastern tourists, international hotel chains such as Intercontinental Madrid are working hard to draw Muslim guest by offering halal food and other relevant services (Rahman, 2015). Malta has recognised the benefits halal tourism can generate for the country's economy (Times of Malta, 2015). A Maltese member of parliament recommended that Malta should consider creating halal-friendly facilities in order to attract tourists from the growing market (Times of Malta, 2015).

In the United States, many organisations are also working to accommodate Muslim tourists, for example the city of Orlando in the state of Florida, whose airport has opened a prayer room for Muslim travellers before Emirates began flights to the city (Castrodale, 2015). The prayer room contains an ablution space and an area to store luggage whilst praying (Castrodale, 2015). Another Example from Orlando is a real estate agency in the city that offers "halal vacation homes" which has prayer mat and copies of the Quran and an option of an outfitted barrier on the pool decks of the rental properties (Diebelius, 2015). In addition, some accommodation providers in the United States are catering to Muslim guests, such as The Ritz Carlton which have trained their front line staff on cultural norms of guests, have gender segregated facilities, and have Middle Eastern chefs in their staff in the chains' New York and Dallas hotels (Diebelius, 2015). New York City is also home to a very popular food cart called the Halal Guys (Alfaro, 2015). The Halal Guys offer halal dishes such as chicken or falafel, which when first established sold halal food to Muslim taxi drivers (Vadukul, 2014) but has since has become popular with locals and tourists alike with many lining up for up to an hour at the food cart (Alfaro, 2015). The halal guys' success has led to them franchising worldwide (Alfaro, 2015).

Similarly, Australia is capitalising on halal products, being one of the top halal beef producers in the world (Norazmi and Li, 2015). The hospitality industry in Australia is too providing halal friendly services for the Muslim tourists arriving at its shores. The number of in-bound travellers from the Middle East to Australia is rising which has prompted accommodation providers to offer services for Muslim Guests (Saurine, 2010). Middle Eastern tourists are a lucrative target market as they tend to stay longer than the average tourists and spend more per trip than the average tourist (Zawya, 2015) an average of US\$9900 is spent by a Middle Eastern tourists per trip (Diebelius, 2015). Some Middle Eastern tourists arriving in Australia are seeking a break from the sweltering summer heat in the Middle East (Zawya, 2015). Queensland launched a digital campaign entitled "Why not try Gold Coast for a cooler Ramadan this year?", which aimed to attract Middle Eastern tourists to the state (Gradstein, 2012). There are a number of operators in the Gold Coast offering halal certified food (McCormack, 2012). Business News Australia (2010) mentions that during Ramadan, the Courtyard by Marriott Surfers Paradise in partnership with Gold Coast Tourism introduced an evening lounge for Muslims three nights a week free of charge. The Evening lounge offered *iftar* (meals to break the fast) and hookah

pipes for the enjoyment of patrons (McCormack, 2012). Most of the theme parks in Gold Coast already have dedicated prayer rooms on-site and have halal food items on their menus (Pepperell, 2007), such as Dreamworld theme park (Saurine, 2010). A few shopping centres in Gold Coast are also choosing to convert spaces on their premises to prayer rooms and halal food eateries, such as Harbourtown outlet shopping centre (Harbourtown, n.d.).



Example of prayer room in a Gold Coast theme park (Warner Brothers Movie World)

Many accommodation providers throughout Australia already provide Muslim guests a copy of the Quran and prayer mats upon request (Saurine, 2010). In 2015, HalalTrip partnered with Tourism Australia to produce a Muslim travel guide to Australia (HalalTrip, 2015). The Muslim travel guide provides facts about each Australian state and territory and what they have to offer to Muslim tourists regarding shops, locations of Mosques, and where to find halal food (HalalTrip, 2015). Similarly, the South Australia Tourism Commission website added a link for Muslim tourists to obtain tips regarding local mosques, halal restaurants, and bakeries (Saurine, 2010).

1.3 Halal tourism in New Zealand

Tourism is the second largest industry that contributes to the New Zealand economy (second only to dairy) (Tourism New Zealand, 2015a). According to Tourism New Zealand (2015a), the tourism industry contributes NZ\$ 8.3 billion per annum to New Zealand's Gross Domestic Product. Halal tourism has been identified as having the potential to boost the New Zealand economy (Tourism New Zealand, 2012b). Malaysia and Indonesia, which are predominantly Muslim countries, have been recognised as growth markets by Tourism New Zealand (Tourism New Zealand, 2012b). Tourism New Zealand created an Indonesian visitor profile which mentions that an Indonesian traveller enjoys experiencing new cuisine and encountering different cultures all whilst being able to practice their religion (Tourism New Zealand, 2015b). Activities such as walking and hiking, volcanic/geothermal

attractions, and bird watching are amongst the top attractions enjoyed by Indonesian tourists (Tourism New Zealand, 2015b). The Indonesian visitor profile also highlights the two primary accommodation types chosen by Indonesian tourists in New Zealand were hotel (83%) and motel (30%) (Tourism New Zealand, 2015b).

In order to portray New Zealand as a halal-friendly destination and attract Muslim tourists to the country, Tourism New Zealand and Christchurch International Airport launched a halal guide to New Zealand entitled “New Zealand: A culinary haven for Muslims” (Tourism New Zealand, 2012b). The guide contains general information for tourists as well as a comprehensive list of halal restaurants, cafes, and grocers (Tourism New Zealand, 2012b). It has been suggested that another opportunity to promote New Zealand as a Muslim-friendly destination would be in creating a major Eid festival (There are two Eid festivals in the Muslim calendar the first is Eid al-Fitr (the festival of breaking fast) celebrated after Ramadan (BBC, 2011), and the second is Eid ul-Adha (the festival of sacrifice) a four day festival celebrated on the 10th day of the twelfth month of the Mulsim calendar (BBC, 2009a)) in Auckland, similar to the Lantern and Pasifika festivals already held annually in Auckland (Tan, 2013).

Nevertheless, there are some obstacles to halal tourism in New Zealand. For example, during her tenure as Ethnic Affairs Minister Judith Collins had dismissed a call from the Ethnic Affairs office in New Zealand recommending that the New Zealand government should capitalise in the lucrative opportunity of halal tourism and work to promote it, due to government policy (Field, 2012). According to the CrescentRating top halal friendly holiday destinations (CRaHFT) ranking in 2013, New Zealand was ranked in 20th place in the field of non-OIC member countries (CrescentRating, 2013), and was ranked in top 19th non-OIC nation in the 2015 GMTI ranking (45th place in overall (CrescentRating, 2015b)). This is despite Statistics New Zealand indicating that there has been a constant rise in visitor numbers from countries with a sizeable Muslim population such as Malaysia and Indonesia. Statistics New Zealand reports that visitor arrivals from Malaysia has grown from 19,718 visitors in 2009 to 28,368 visitors in 2013 with a spike in 2012 of a record 36,007 visitors due to the introduction of the now discontinued Kuala Lumpur to Christchurch route of Air Asia X airline. Similarly, visitor numbers from Indonesia have grown from 7,526 visitors in 2009 to 12,384 visitors in 2013, and that number is expected to rise due to the Indonesian Airline Garuda resuming flights between Auckland and Jakarta.

Some hospitality businesses in New Zealand are also embracing the concept of halal. A prime example is Burger Fuel, an international fast food chain which started in New Zealand, which has a number of outlets in the Middle East. According to Burger Fuel’s website, the meat used in all their outlets are certified halal and that any of their burgers can be “halalified”, by ensuring that the food and the utensils used to prepare the burgers are washed, cleaned, and separated from non-halal foods and utensils to ensure no cross contamination occurs.

Previous research conducted in the field of halal in New Zealand has mainly focused on halal food and halal meat from New Zealand, for example Wan Hassan and Awang (2009) studied the availability of halal food in New Zealand restaurants, Wan Hassan and Hall (2003) explored Muslim travellers' need for halal food in New Zealand, and Farouk (2013) discussed halal meat production techniques. There are no studies that examine the availability of halal attributes among accommodation providers in New Zealand. Previous studies, such as Battour et al. (2011) and Saad et al. (2014), in the field of halal accommodation attributes has been conducted in other countries with a bulk of those studies dedicated to countries with a Muslim majority population, for example Saad et al. (2014) discussed Sharia-compliant hotels in Egypt.

1.4 Aim of this thesis

The aim of this thesis is therefore to study the status of New Zealand accommodation providers in terms of halal friendliness and explore which halal attributes are available to the halal tourist.

1.4.1 Outline of thesis

After this introductory chapter on halal tourism, a review of the available literature in the field of halal is offered in the next chapter. Halal's rising popularity in the service industry, and accommodation attributes favoured by Muslim tourists will be discussed followed by the method used to achieve the aim of the study. The results gathered by content analysis and the secret shopper are reported thereafter. Also, the results of an inquiry into the curriculum of New Zealand's tertiary institutions offering culinary courses are reported. Finally, the thesis concludes with a discussion of the results and managerial implications and suggestions for future research are put forward.

1.5 Chapter Summary

Many Muslims are choosing to abide by their religion's teachings whilst travelling and choose goods and services that are permissible for them under the guidelines of Islam. This is called halal tourism. An increasing number of halal tourism oriented products are being produced. Mobile apps providing destination information for Muslim tourists are on the rise. Companies that produce halal products are choosing to participate in the increasing number of trade fairs and forums being held around the world in order to promote their goods and services and exchange ideas.

Many countries are embracing the idea of halal tourism and are increasingly offering goods and services that adhere to the principles of Islam in order to draw the custom of the Muslim traveller, such as the offering of halal food, and the creation of gender segregated facilities in order to accommodate the needs of the halal tourist whom prefer the separation of genders. The tourism industry in New Zealand has also recognised the importance of catering to Muslim tourists and the efforts needed to attract them to the country, for example Tourism New Zealand created a halal food guide to distribute internationally to showcase New Zealand as a halal friendly destination.

Chapter 2: Literature Review

2.1 Introduction

This literature review will discuss the rising demand for halal goods and services, including the importance of providing halal food, due to the increasing number of Muslims travelling around the world. Halal's role in hospitality will also be addressed and include examples of current and future plans for Islamic-friendly hospitality services. The concept of halal tourism and the idea of halal friendly accommodation will be examined in-depth and a list of halal-friendly accommodation attributes is presented. Finally, a discussion of halal tourism in New Zealand is provided.

2.2 Demand for Halal Products

The growth in demand for halal products is a widespread consumer trend. Changes in the social and economic situations of predominantly Muslim nations and an increase in migration, tourism and trade from such countries have seen growing demand for halal products in both Muslim majority and Muslim minority countries (Bon and Hussain, 2010). The increase in demand for halal goods is primarily due to the requirements that Muslims' use products and services that adhere to their religious values (Rarick et al., 2012). Lada et al. (2009) studied the intention to purchase halal products using the theory of reasoned action, and found that most Muslims had a positive attitude towards halal and would purchase halal if offered the chance. However, in the same study some respondents expressed that their positive attitude towards halal would not affect their purchase intentions. Muslims have a tendency of risk aversion and therefore seek high involvement with products they purchase to ensure conformity with their beliefs (Henderson, 2010). Muslims tend to take some measures to ensure the products they consume are compliant with their faith (Marranci, 2012), such as the example discussed in Marranci (2012). Muslim diners in Singapore take some extra steps when dining in public to ensure they consume products that conform to their religious beliefs (Marranci, 2012).

These trends drive the consumption of halal products, thus turning such products into a viable niche market in countries with minority Muslim populations, such as New Zealand, or in international trading. Wherever there are Muslims whose preferences are governed by halal guidelines then a halal market exists (Abdul et al., 2009). The global halal products market is proving to be lucrative and is valued at US\$2.3 trillion (Malaysia International Halal Showcase, n.d.). The idea of marketing Muslim-friendly goods and services is called "Islamic marketing" and fulfilling such brands as "Islamic branding", and is proving popular and attracting the interests of marketing professionals and scholars alike (Wilson and Liu, 2011). Yusof and Jusoh (2014, p.179) define Islamic branding as "*a product or service that meets the Sharia-compliant and any parties that involved in Halal accreditations should be seriously implemented strict procedures to the producers in getting the Halal logo*". The notion of halal has

expanded beyond food in the marketing scene, as illustrated by Wilson and Liu (2011, p.36) “*Observations indicate that the market is expanding towards including products such as cosmetics and entertainment - moving it beyond “Meat and Money”*”. Increased awareness coupled with increased affluence of the Muslim world has led some marketing professionals to rethink some marketing and product development strategies in order to come up with goods and services that would better suit the Muslim consumer (Bon and Hussain, 2010). Although the concept of Islamic marketing is relatively new to the Western marketing scene, it is by no means a new one, as Muslims have been trading for over a thousand years and through their trade they have come into contact with different cultures and have had to adapt their approach into an Islamic context and to match the local cultures in order to market their goods and services (Wilson and Grant, 2013).

A sound understanding of the halal guidelines is essential when catering to Muslim customers. A lack of trust in Western firms as well as inconsistent halal labelling have proven to be major issues when marketing halal products to consumers in Malaysia and Indonesia (Rarick et al., 2012). Therefore, vendors must have a sound comprehension of halal procedures, so as to address any questions or concerns a customer might have about a product being halal or not (Rarick et al., 2012). Rarick et al. (2012) state that the lack of consumer trust is a result of the impression that certain companies might have a special agenda when producing halal products and that some of the so-called halal products on offer might not fully comply with religious standards because they were produced in non-Muslim countries.

The halal market covers a wide range of goods and services. Muslims have special dietary guidelines set out in Islamic law, Muslims are only allowed to consume food that is halal. The rising demand for halal food internationally has made the halal food market extremely lucrative, and it is one of the fastest growing food industry sectors (Khalek, 2014), with an estimated global value of US\$700 billion (Spire Research, 2015). In the past Muslims residing in Europe tended to avoid foods that did not correspond with their religious beliefs and chose to shop at specialist and ethnic stores (Lever and Miele, 2012; Stephenson, 2014), however, more recently Muslims’ need for halal labelled food has been recognised (Bonne et al., 2007) and is increasingly becoming available in supermarkets (Lever and Miele, 2012; Stephenson, 2014). The global recognition of the profitability of halal food has also encouraged greater international competition for the supply of halal food (Zailani et al., 2015). The use of halal logos and certification is a way halal producers can assure their clientele that their product adheres to Islamic food procedures, and that the product on offer is free from any items that are deemed as objectionable by Muslims (Syed Marzuki et al., 2012a, 2012b, 2013; Khalek, 2014). For example, meat producers use halal as a way to communicate that the meat complies with religious requirements and as a means to assure consumers of quality (Thomas et al. 2015).

Demand for halal also extends into the realm of the service industry. Services targeted at Muslims that abide by Islamic Guidelines are also on the rise (Souiden and Rani, 2015). Islamic banks are a prime

example. Islamic banks that offer service more in line with Islamic teachings, such as interest-free loans, are progressively becoming available worldwide and are growing in popularity (Souiden and Rani, 2015). Islamic financial schemes have even attracted the attention of the academic world where courses in Islamic finances are being taught in institutions such as Harvard (Souiden and Rani, 2015). Services that comply with the guidelines of Islam are also increasingly becoming available in the hospitality industry.

2.3 Halal in Hospitality

The hospitality industry has also seen a rise in the popularity of Islamic-friendly services (Battour et al., 2014). Although most efforts in accommodation and lodging development in the past have been dedicated to a secular market, whilst deeming religious needs as less important, catering to religious needs has gathered in pace in recent years (Weidenfeld and Ron, 2008). Islamic hospitality has developed over the past decades and has become a valid part of the hospitality and foodservice industry with several recognised features (Stephenson, 2014). Some fast food outlets are adapting their offering and some are including halal items on their menus (Stephenson, 2014; Wright and Annes, 2013). For example, French fast food franchise Quick started selling halal hamburgers at a few of their outlets in 2009 (Wright and Annes, 2013). The Quick franchise's decision to add halal items to their menu was conceived due to the sizeable Muslim community in several areas of France (Wright and Annes, 2013). Similarly, fast food chain Kentucky Fried Chicken (KFC) has approximately 100 outlets in Britain that serve halal food items (Henley, 2014). Henley (2014) mentions that KFC's decision to open halal outlets was due to a rise in demand for halal items. In the United States, fast food chain Subway has outlets that serve items deemed halal (Din, 2006).

The addition of halal certified items has also proven to be successful elsewhere as foodservice brands internationalise. For example, Ibrahim and Mokhtarudin (2010) note that when a KFC outlet in Malaysia acquired halal certification an increase of 20% increase in the number of customers was recorded. Fast food chains Taco Bell and Burger King have seen similar results once acquiring halal certification (Ibrahim and Mokhtarudin, 2010). In Singapore, when McDonald's received a halal certification, the fast food chain's patronage rose to being visited by 8 million customers a year (Lada et al., 2009).

Other services are being developed to cater to the growing need for hospitality services that comply with Islamic guidelines. Halal airlines are being considered where airplanes would be refitted in a way that would satisfy religious guidelines, such as to separate genders, and dedicate a space for prayer, and providing halal food and prohibiting alcohol (Stephenson, 2014). Another concept in the planning phase is halal cruises, with some efforts being made to create an Islamic cruise experience complete with services and activities that would suit Muslims (Stephenson, 2014).

2.4 Travel in Islam

Travel is encouraged in Islam. Travelling for religious purposes is a fundamental aspect of the Islamic religion. One of the five pillars of Islam is the performance of Hajj (the pilgrimage to Mecca required of every Muslim of sound mind which takes place on the last month of the Muslim or Hijri calendar). Muslims must travel to the city of Mecca in order to perform the Hajj pilgrimage (Jafari and Scott, 2014). According to Saudi Arabia's Central Department of Statistics and Information, 70.9% of the 1.95 million pilgrims that performed Hajj that year were not from Saudi Arabia in the 2015 Hajj season.

However, the Quran encourages Muslim to undergo travel for non-religious purposes as well. Muslims are encouraged to travel in order to marvel at God's creation as demonstrated in the following verse from the *Quran*:

Say: "Travel in the land and see how (Allah) originated creation, and then Allah will bring forth (resurrect) the creation of the Hereafter. Verily, Allah is able to do all things" (29:20)

Muslims are also encouraged to travel to witness what has happened to previous people who have incurred God's wrath (Jafari and Scott, 2014) as demonstrated in the following verses from Surat Al-Anaam (The Cattle) from the *Quran*:

Say: "Travel in the land and see what was the end of those who rejected the truth" (6:11)

There are many motivations that encourage Muslims to visit foreign countries as well as travel domestically. There is an increase of migration of Muslims to predominantly non-Muslim nations (Bon and Hussain, 2010), thus travelling to visit family members or friends whom have immigrated to other nations is emerging as a significant motive for travel (Battour et al., 2014). Conversely, Muslims that have migrated to other countries might travel back to their ancestral land in order to appreciate and learn the culture or for ceremonial purposes, significant life events such as weddings or funerals are a prime example (Stephenson, 2014). International student mobility is also an important factor in encouraging travel, both by family at the time that students are studying away from the home country as well as in later years for return visits to see friends. Another motive to travel is the availability of sites of cultural, historical, or natural interest that attracts tourists. Tourists from the Middle East might be tempted to visit Europe due to the perception that European countries are stable, secure and offering a plethora of tourism opportunities such as beautiful natural setting and historic world heritage sites (Prayag and Hosany, 2014). Prayag and Hosany (2014) bring up the example of tourists from the United Arab Emirates (UAE) whom were drawn to France for its world famous cuisine and the many museums containing historical artefacts from around the world.

Regional travel by Muslims within predominantly Islamic regions is also important, for example tourism within the Arab world. Lebanon and until recently Syria were one of the leading destinations for Saudi Arabian tourists, both of which were known for their pleasant Mediterranean climate and

historically significant sites. Hosts in Lebanon have adapted their services in order to accommodate the needs of Saudi Arabian tourists. Ladki et al. (2002) note that Saudi Arabian tourists tend to travel in large groups, most often the group is composed of an entire extended family, often the travel group would number between 14 and 24 family members. Ladki et al. (2002) stated that in the past, Saudi Arabian travellers favoured leasing furnished apartments and having all the comforts of home whilst on holiday, however, there has been a shift in preferences towards hotel rooms, and would require anywhere from six to ten hotel rooms. Ladki et al. (2002) comment that attracting Saudi Arabian tourists is financially viable due to the fact that Saudi Arabian tourists are known to spend a lot of money on luxuries and accommodation comforts. Other destinations in predominantly Muslim countries are finding a favouring amongst Muslim travellers. Turkey is fast becoming experiencing a rise in the arrivals of halal-conscious tourists (Girit, 2014). In response to this rise in demand, many Turkish destinations are establishing halal-friendly facilities, such as hotels and gender segregated beaches (Girit, 2014). The halal friendly establishments in Turkey have proven more popular with domestic tourists rather than foreign Muslim tourists (Aydoğan, 2013).

2.5 Halal Tourism

The phenomenon of the rise in demand for tourism services that adhere to the laws of Islam has been dubbed as “halal tourism”, “Islamic tourism”, or “Sharia tourism” (Henderson, 2010; Mohsin et al., 2015). According to Carboni et al. (2014, p. 2), Islamic tourism is defined as *“tourism in accordance with Islam, involving people of the Muslim faith who are interested in keeping with their personal religious habits whilst travelling”*. Muslims that choose to obey the teachings of their religion whilst travelling, particularly in non-Muslim countries, has created a market for Muslim-friendly tourist services. Many nations around the world, such as Malaysia and Singapore, are capitalizing on the rise in demand for Muslim-friendly tourist services (Henderson, 2010). Malaysia has utilised the opportunity to cater to Muslim tourists’ needs especially ones from Middle Eastern countries by offering Muslim-friendly products (Henderson, 2010). Malaysia has a proven track record in the field of halal goods and services and has worked to establish itself as a global halal hub (Fischer, 2008). Websites from Malaysia have been set up targeted at travellers from the Middle East and South East Asian countries (Henderson, 2015). The aforementioned websites contain information that would be helpful for Muslim tourists such as Muslim friendly service providers and shops as well as the widespread availability of prayer facilities and the abundance halal food outlets are highlighted (Henderson, 2015). Malaysia’s halal friendliness makes it an attractive destination for Muslim medical tourists (Musa et al., 2012), noting that exceptional medical facilities coupled with Muslim-friendly services attracts Muslims to travel to Malaysia to undertake medical procedures. Such services include having prayer rooms for patients and halal food options (Enderwick and Nadar, 2011). Although without a Muslim majority, Singapore has also begun to promote itself as a Muslim-friendly country to the Muslim world, both of those countries have seen a significant rise in Muslim tourists arriving at their shores. More than

300 accommodation providers in the island state have received Malaysian halal accreditation in order to draw the patronage of Muslim travellers (Stephenson, 2014). Singapore was also ranked the top non-OIC destination for Muslim travellers (Fahmy, 2015).

Some Muslim travellers are also choosing accommodation providers that offer halal-friendly services. Accommodation providers can design their attributes in order to cater to guests' religious needs (Weidenfeld and Ron, 2008; Battour et al., 2011). The demand for halal-friendly accommodation attributes has also created a trend in hospitality called Sharia-compliant hotels (Henderson, 2010). Saad et al. (2014) suggests that under Islamic hospitality, there are three types of hotels: *Dry hotels* that do not sell alcohol on their premises, *partially sharia compliant hotels* that have Islamic attributes, and *fully sharia compliant hotels* where all the hotel's attributes, services, and even operations are all governed by sharia. Sharia compliant hotels are growing in popularity among Muslim travellers due to the fact that they offer attributes that are suited to them such as the offering of halal food, gender segregated facilities, and amenities that facilitate the performance of a Muslim's religious duty such as prayer (Henderson, 2010). Sharia compliant hotels are gathering pace in countries such as the United Arab Emirates which has a number of hotels, such as Jawhara hotels which were established in 2004, that are dedicated to being sharia and Islamic compliant (Henderson, 2010). The significance of sharia compliant hotels in the Emirates, as in other Gulf States, has also expanded as the region has sought to develop themselves as aviation and tourism hubs. Therefore, provision of accommodation attributes that conform to Islamic guidelines are essential in order to draw the custom of the halal tourist.

2.6 Accommodation Attributes

The attributes of an accommodation provider plays a vital role in attracting business (Torres et al., 2014). The number of attributes and amenities an accommodation provider offers are assessed by consumers when choosing a lodging whilst travelling (Caber and Albayrak, 2014). Essential accommodation attributes are divided into two main categories: those involving the accommodation's ambience and room comfort, and the other relating to employee attitudes and behaviour (Atkinson, 1988). In a study of environmentally-friendly rooms' selection process, Millar and Baloglu (2011) found that consumers relied on the green attributes of hotels as cues to help them make a decision about a service provider. Millar and Baloglu (2011) also found that consumers rank accommodation attributes, and that some attributes are considered more important than others. Given that the service industry is intangible, consumers rely on tangible cues, such as amenities on offer, in order to assess the service quality (Gayatri and Chew, 2013). Service providers can create and maintain a competitive advantage by delivering a high service quality. High service quality in turn will result in customer satisfaction which results in customer loyalty and positive word of mouth (Wong, 2004). Accommodation providers can tailor their amenities to suit the guests' preferences such as stocking the in-room fridge with items the guest favours (Yang and Lau, 2015). Catering to patrons' religious needs and the provision of halal-

friendly attributes seems to delight Muslim tourists (Battour et al., 2014), and can result in a level of customer satisfaction (Battour et al., 2014).

The offering of certain amenities has been identified as impacting a Muslim traveller's choice of accommodation. Religious belief influences the destination decision-making process and guides the choice of accommodation for Muslims (Battour et al., 2011; Battour et al, 2014). Battour et al. (2011) also listed a number of attributes an accommodation provider should have to appeal to the Muslim traveller. These include

- Meeting the religious needs of patrons, e.g. the provision of prayer mats in rooms; an indication of where the Qibla (prayer direction) is;
- Separate swimming quarters for men and women);
- Places of worship, e.g. the accommodation's proximity to a mosque or the dedication of a space in the hotel for the congregation of Muslims to perform prayers, especially Friday prayers;
- Availability of halal food, e.g. the provision of halal meal choices by the accommodation provider in restaurants and in-room dining;
- Banning of alcohol consumption and gambling, including the removal of alcoholic beverages from the room in which a tourist is staying, and sexual permissiveness, e.g. removing any pornographic material and any sexually suggestive programming options from being broadcasted in the room or the proximity of the hotel to the local red light district; and
- Staff dress code, e.g. guaranteeing conservative dress by hotel staff.

In a discussion of the Muslim tourist's accommodation requirements Battour et al. (2011) mention that some hotels in Israel have started to include prayer mats and a copy of the Quran in rooms where Muslim travellers are staying in as well as a sticker that indicated the Qibla. The hotel guests have received such moves positively.

2.6.1 Design

In order to attract Muslim travellers, an accommodation provider should offer the basic needs a Muslim requires in order to meet their religious requirements. Hotels meeting the religious needs of patrons in Battour et al. (2011)'s list of attributes deals with this for the majority of Muslims. Stephenson (2014) also mentions that accommodation providers should take into consideration the religious beliefs of their Muslim patrons in order to fulfil their needs and maximise customer satisfaction. Battour et al. (2011) writes that there have been efforts to improve the religious-friendliness of hotels, and brought up an example of suggestions to include Christian religious items such as bibles, inclusion of information on religious institutions, and the display of religious items in rooms such as crosses and images of the Virgin Mary to satisfy Christian tourists. Battour et al. (2011) suggests that this can also be done for Muslim patrons by including religiously significant items and services in rooms, such as the inclusion of a copy of the Quran, prayer mats, a list of prayer times, and an indicator of the Qibla (direction to

Mecca for prayer). Stephenson (2014) also observes that as well as including religious items in rooms, some items can be removed, such as decorations that are objectionable (contain nude figures) or contain animals. Stephenson (2014) also proposes that halal toiletries be offered in rooms.

2.6.2 Worship Facilities

An accommodation provider that intends to cater to Muslim guests needs to take worship requirements into consideration. Battour et al. (2011) remark that Muslims are required to pray five times a day and need a clean space in order to conduct their worshiping duties, thus having a space for prayer is an essential facility. An accommodation provider can set aside a space within its premises and dedicate it as a site in which Muslims can undertake prayer and Friday prayers (Battour et al., 2011). Battour et al. (2011) also found that accommodation providers that were willing to provide these facilities to their patrons were looked up favourably by potential customers when deciding upon accommodation whilst travelling.

2.6.3 Halal Food and Dining

Hotel dining is a key part of the travelling experience. As discussed above, Muslims can only consume food that is deemed halal, therefore whilst travelling Muslims require halal food at the chosen destination. Stephenson (2014) wrote that halal food is no longer a regional practice confined only to Muslim nations, but is now a legitimate international requirement and an essential element in the halal hospitality sector. Lada et al. (2009) suggested that 75% of Muslims choose to consume halal food when travelling due not only to religious guidelines but also due to the perception that halal food is healthier, cleaner, and tastier. Prayag and Hosany (2014) noted that the availability of halal food is a deciding factor for Muslim Arab tourists when visiting Europe, and the perception that there is a lack of halal options can deter them from visiting certain destinations. Lada et al. (2009) also mention that preference for halal food means that people favour buying a low quality product with a halal certificate to a high end product that is not halal-certified.

The provision of halal food by hoteliers serves as a competitive advantage (Stephenson, 2014). Yusof and Shutto (2014) use halal food in Japan as an example of the lack of halal food in a country and the efforts being made to cater to the Muslim population and tourists to Japan. Yusof and Shutto (2014) writes that in the whole country there are 55 halal food outlets in 27 out of 48 prefectures in Japan, mainly selling halal food and ingredients. Yusof and Shutto (2014) noticed that Muslims in Japan tend to mostly cook at home or when dining out either opt for ethnic restaurants or choosing the vegetarian option from the menu when dining at authentic restaurants. However, there are efforts nowadays in the hospitality industry to serve halal food. Yusof and Shutto (2014) mentions that Japanese hospitality establishments have begun to realise the financial benefits of supplying halal food. As of 2012 a Japanese certification standard has been established, and the Japan Halal Association (JHA) has been set up to oversee and consult business on halal and advocate greater supply of halal products in Japan.

The ability to communicate knowledge of halal food practices is imperative when an establishment decides to serve halal food. Knowledge about halal is crucial in order to demonstrate to a Muslim tourist that their product is genuinely halal by communicating and telling the tourist about the food preparation or that the service on offer is in accordance with Islamic law (Bon and Hussain, 2010). Accommodation providers can also communicate the availability of halal food to potential occupants by mentioning it on their communication channels (Khan and Khan, 2015; Khan and Khan, 2016).

2.6.4 Alcohol and Gambling

According to the majority of interpretations under Sharia, Muslims are forbidden from the consumption of alcohol and gambling. It is therefore important for accommodation providers wanting to cater to halal tourists to make arrangements to limit contact with alcohol and gambling. Intoxicants and gambling are viewed in Islam as the most shameful of evils (Battour et al., 2011; Samori and Sabtu, 2014). Accommodation providers can take certain measures so as to limit the contact of Muslims with alcohol (Stephenson, 2014; Hashim et al., 2007). Battour et al. (2011) suggest that Alcohol can be removed from the in-room mini fridge, and brought up an example from their research an incident when a Muslim mother was asked by her child to open a can of beer he had picked up from the in-room fridge thinking it was a soft drink. Battour et al. (2011) also suggest that labels can be introduced to notify the guests about food items that contain alcohol. Stephenson (2014) writes that an accommodation provider can also take some measures to in order to advice a halal tourist about the nearby location of casinos and places where alcohol is consumed.

2.6.5 Sexual Permissiveness

Sexual permissiveness is frowned upon in Islamic writing. Many verses of the Quran forbid adulterous activities and mention that it is an evil itself and a gateway for worse evils. Battour et al. (2011) comment that some Islamic scholars regard sexual permissiveness as haram, and public displays of affection in some Muslim countries are regarded as criminal acts and punishable by law. Muslim parents travelling with children would like to avoid exposing their children to situations where inappropriate actions are taking place (Battour et al., 2011). Stephenson (2014) states that steps can be taken by accommodation providers to limit sexual permissiveness, such as the blocking of pay-per-view adult channels from in-room entertainment; only showing conservative, family-friendly channels; and prohibiting music expressing seductive messages being broadcasted in the accommodation provider's premises. Accommodation providers should also produce guides advising Muslim guests of the red light districts' locations, strip clubs, and places of questionable reputations so as to be informed and avoid those establishments (Battour et al., 2011), as families might want to prevent their children from exposure to what they regard as inappropriate activities (Carr, 2011; Ram et al., 2014; Ram & Hall, 2015).

2.6.6 Health and Recreational Facilities

The availability of health and fitness facilities at a lodging is an influential factor in the accommodation selection process (Jones and Chen, 2011). When guests are evaluating the accommodation options on offer, the availability of recreational facilities is one of the important attributes guests use to form accommodation consideration sets (Jones and Chen, 2011). Accommodation providers intending to attract fitness conscious travellers are redesigning and refitting their fitness and recreational facilities to suit the fitness conscious guests (Stoller, 2005). An example of this is the Houstonian hotel in the United States, which boasts three swimming pools, 8 tennis courts, 300 fitness equipment, and even an indoor track (Stoller, 2005). Nevertheless, despite such provisions some guests are choosing to exercise in their room, often for reasons of privacy and what they regard as appropriate behaviours (Stoller, 2005). Stoller (2005) mentions that international hotel chains such as Hilton and Westin are offering in-room workout equipment for guests. Muslim tourists have expressed an interest in the use of a lodging's recreational facilities, such as gymnasiums (Battour et al., 2011). However, Muslim travellers require that the gymnasiums available be gender segregated (Battour et al., 2011; Stephenson, 2014; Samori and Sabtu, 2014; Abdul Majid et al, 2015; Henderson, 2010; Nassar et al., 2015).

The availability of a swimming pool on premises also plays apart in the accommodation selection process (Jones and Chen, 2011). Muslim tourists are also interested in using the swimming pool available on the premises, however in the same way to gymnasiums, Muslim guests prefer gender segregated swimming pools (Samori and Sabtu, 2014; Battour et al., 2011; Eid, 2015; Abdul Majid et al., 2015). Some female Muslim tourists have expressed their dismay at attending swimming facilities with their families where other females wear bikinis, whereas other female Muslim tourists might feel uncomfortable using facilities that require the swimmer to wear clothing that might not be in line with Islamic teaching (Battour et al., 2011). A method of creating gender segregated swimming pools when an establishment has one swimming pool on-site is to implement a time slots where one gender will exclusively use the pool at a certain designated time and the gender can use the same pool at a later time (Battour et al., 2011).

The presence of health facilities where a guest can get a beauty treatment onsite is seen favourably by Muslims (Yaman et al., 2012). Day spas and beauty salons are patronised by clients wanting to pamper oneself and to also rest and rejuvenate with an assortment of beauty treatments (Yaman et al., 2012). Some treatments on offer might be contrary to Islamic teachings and might have to be modified in order to cater to a Muslim clientele (Yaman et al., 2012). The provision of black hair dye and wig treatments, treatments that require the guest to disrobe, and females receiving beauty treatments from a male are all contrary to Islamic Spa Practice (a guide for a nature spa business to operate in accordance with Islamic law (Yaman, et al., 2012)).and thus would need to be altered and adapted to better serve a Muslim client (Yaman et al., 2012). Beauty products need to also be halal to better satisfy a Muslim's religious necessities (Yaman et al., 2012). As with fitness facilities, health facilities need to be gender segregated

(Yaman et al., 2012; Stephenson, 2014) and women need to be away from the view of men (Yaman et al., 2012). The décor of the health facilities need to also be taken into consideration. Many day spas that offer Balinese and Thai treatments use statues to decorate their facilities, although such items are prohibited in Islamic Spa Practice (Stephenson, 2014; Yaman et al., 2011). Missing prayer times while undergoing beauty treatments is a concern (Yaman et al., 2012), some Thai establishments have identified Muslims' needs and are offering health remedies to Middle Eastern clients that includes the provision of halal meals and allocated time for prayer (Chanin et al., 2015).

2.6.7 Gender segregated facilities

The common theme amongst halal health and recreational facilities is gender segregation. Gender segregating facilities would hinder the free mixing of sexes which is frowned upon and is in violation of some interpretations of Sharia law (Battour et al., 2011; Eid, 2015). Gender segregation allows for female Muslim guests to enjoy their stay at a lodging in relative safety (Abdul Majid et al., 2015). Lodgings that cater to halal conscious guests have dedicated entire floors solely for the use of a single gender serviced by only staff of that gender (Stephenson, 2014; Samori and Sabtu, 2014), a concept that is not confined to halal tourism but is available in some Western countries where a number of hotels offer female only floors for security reasons, e.g. the Georgian Court Hotel in Vancouver (Stephenson, 2014). Beachside hotels are also recommended to include a females only area (Battour et al., 2011; Stephenson, 2014) so female Muslim guests can relax and enjoy themselves without worrying about violating their religion's code (Battour et al., 2011). Gender segregation is not confined to the accommodation setting, Monir, 1997 (as cited in Hashim et al., 2007) suggests that entertainment have separate queues for gender, another example is having female only taxi drivers (Battour et al., 2014).

Muslim Travellers evaluate a destination's Islamic attributes including gender segregation (Shafaei and Mohamed, 2015). Thus, accommodation providers aiming to cater to Muslim guests' needs should take the inclusion of gender segregated facilities into consideration (Samori and Sabtu, 2014). Having gender segregated recreational facilities allows the halal conscious traveller to adhere to their religious teachings whilst staying away from home (Samori and Sabtu, 2014; Stephenson, 2014).

2.6.8 Price

Another important accommodation attribute is price. The price of accommodation is found to be an important influencer in the accommodation selection process (Lockyer and Roberts, 2009), as consumers use price to compare accommodation providers and make a choice (Hecht and Martin, 2006). Accommodation attributes can have a significant effect on price (Zhang et al., 2011). Attributes such as hotel location can impact the room rates (Zhang et al., 2011). Some hotel guests might be willing to pay more in order to have access to certain attributes, such as in the example of Bilgihan (2012) who studied hotel guests' willingness to pay more for in-room entertainment amenities, and found that although guests wanted most their in-room entertainment to be free, some were willing to pay more for

in-room gaming consoles. The provision of religious accommodation attributes might influence the room rates (Weidenfeld, 2006). Mohayidin and Kamarulzaman (2014) found that when it came to halal food, consumers expressed their willingness to pay a higher price for halal foods, and that many considered halal more important than price.

2.6.9 Dress code of staff

The sixth item identified by Battour et al. (2011) is also linked to sexual permissiveness, as some staff uniforms are regarded by some patrons as revealing the human form. Jafari and Scott (2014) comment that Muslim guests pay special attention to the destination dress code and take the accommodation providers' staff's dress code into consideration when making a lodging decision. Muslim travellers prefer the staff to abide by a conservative dress code (Saad et al., 2014).

Because of the practice of considering the dress code whilst making a decision about where to stay whilst on holiday some accommodation providers should pay close attention to their promotions. Battour et al. (2011) suggest that marketing efforts need to include Muslim-friendly images and messages so as to attract the attention of the Muslim guest and make their establishment more appealing and thus might attract the business of said guest. Battour et al. (2011) brings up the example of Malaysian companies utilising wholesome messages and images of women dressed in traditional and modest attire in their promotional material directed at potential guests from Muslim nations.

2.6.10 Location

Location is another invaluable asset an accommodation establishment must possess. The close proximity to facilities is a competitive advantage an accommodation provider can capitalise on in order to attract guests. Chan and Wong (2006) discuss that a convenient hotel location is the most influential factor for repeat visitors. Location also plays a role in Muslim visitors' accommodation selection. Battour et al. (2011) mention that halal tourists were more likely to choose a hotel within close proximity to a mosque or an Islamic centre, so as to have the ability to perform prayers and religious rites. As noted above, Battour et al. (2014) mention that due to Islam's stance on sexual permissiveness and alcohol consumption, halal tourists would be most likely to avoid hotels that are within close proximity to red light districts and clubs, in order to avoid contact with customers that engage in those activities. Battour et al. (2011) also suggest that tourism operators and guides should also take location into consideration and keep halal tourists informed of places of worship that they might like to visit and warn them of objectionable establishments near the hotel.

2.6.11 Cleanliness

Cleanliness is another important accommodation provider comfort attribute and a crucial factor in the accommodation selection process (Mohsin, 2007; Lockyer, 2003). Cleanliness influences customer satisfaction. Lockyer (2003) wrote that the cleaner the facilities are the more the customer will be

satisfied. Lockyer (2003) also mentions that the cleanliness of the toilet and bathroom were the most important, followed by the cleanliness of the room as a whole. Battour et al. (2011) comment that the cleanliness of a hotel room and it's bathroom are also essential for Muslims, as Muslims require clean bathrooms to perform ablutions and prepare for prayer, and a clean room would be suitable for praying and reading the Quran. The importance of cleanliness is mentioned in the Quran, as illustrated in the following verses:

- On handling the Quran: "None touch it except the purified" (79:56)
- On performing Ablutions before prayer: "O you who believed, when you rise to {perform} prayer, wash your faces and your forearms to the elbows and wipe over your heads and wash your feet to the ankles. And if you are in a state of Janaabah (major impurity), then purify yourselves." (5:6)
- On the importance of clean clothes "And your clothing purify" (7:4)

2.6.12 Personnel

Another crucial accommodation provider attribute is personnel. Employee behaviour is a key influencer of service quality (Gayatri and Chew, 2012). Wong (2004) explains that the interaction between a patron and an employee is called a service encounter, and Gayatri and Chew (2012) argue that service quality is the attitude developed by the patron as a result of a service encounter. Wong (2004) observe that the service on offer is inseparable from the employee and thus how an employee interacts with patrons has an important impact of the quality of the service delivered and the formation of customer satisfaction by influencing the patron's behavioural response. Wong (2004) further mentions that whether or not a patron forms a positive behavioural response is often determined by how they feel about the contact staff. Skogland and Siguaw (2004) discuss that a hotel's staff is able to engage customers and keep them involved in the purchase decision process through the means of training to display the appropriate attitude when interacting with said customers. Wong (2004) mentions that service providers can create a sustainable competitive advantage by manipulating employee's behaviour in order to provide exceptional service delivery system. Service providers can also educate their staff in other cultural norms (Stauss and Mang, 1999).

2.7 Intercultural Service Encounters

With travellers becoming increasingly mobile and some world destinations becoming more appealing for tourism, service providers' clientele nowadays are more culturally diverse than ever before. It is therefore essential for service providers to become aware of the cultural backgrounds of their clients and be able to respond accordingly in order to get the best results of the service encounter. Culture plays a vital role when evaluating the quality of service received (Kong and Jogaaratnam, 2007). Stauss and Mang (1999) report that a service encounter is called inter-cultural when the customer and the service provider are from two differing cultures. Stauss and Mang (1999) wrote that due to the fact that both

parties in the service encounter have their own set of cultural norms, and as such each party would be more inclined to follow their cultural norm, and that if not managed correctly, inter-cultural service encounters could have negative outcomes, for example tipping for services is customary in the United States but it is not a regular custom in New Zealand. It is therefore recommended by Stauss and Mang (1999) that efforts need to be made by the service provider to identify cultural inconsistencies and educate contact employees of the correct mannerism of interaction with patrons. Stauss and Mang (1999) elaborate that service employees' behaviour is more flexible and better to adjust than other, more physical service attributes. Accommodation providers need to educate their employees in the religious norms of Muslims when planning to accommodate Muslim guests (Hashim et al., 2007). For example some Muslims women abstain from shaking hands as it is a form of contact between unmarried people (Hashim et al., 2007). Another example is Muslims are required to fast during the month of Ramadan, and therefore contact staff must be aware of the fact that the Muslim patrons must refrain from food and drink from sunrise to sunset and should not make any suggestions for meal options such as what the soup of the day is on the lunch menu. Accommodation providers can also hire some Muslims who will interact appropriately with the Muslim guests (Saad et al., 2014).

2.8 Certification

Certification is an important attribute for an accommodation provider to possess. Millar and Baloglu (2011) found in their study that the top ranked attribute in green hotels was certification. Millar and Baloglu (2011) mentioned that consumers rely on certification as a cue for decision making, and in their study consumers relied on the Leadership in Energy and Environmental Design (LEED) green building rating system developed by the U.S. Green Building Council as guide of the environmental-friendliness of the accommodation provider, yet even though certification was important relatively few guests agreed that they would pay more to stay in a green room.

Certification appears similarly important for Muslim consumers and rating systems are currently being created and implemented so as to rate the accommodation providers' halal degree of compliance, such as the CrescentRating system. Rarick et al. (2012) stated that the certification is an important issue when Muslim consumers choose their products, as it is the leading signifier of compliance to the religious demands. Abdul et al. (2009) suggest that certification is an assurance that the product purchased conforms to the religious laws, and that once a product is certified halal and is communicated as such through labelling, Muslims tend to buy it. Abdul et al. (2009) also write that halal-certified products are perceived as clean and are trustworthy. Abdul et al. (2009) state that when labelling halal-certified products, firms rely on distinctive features in order to communicate that their product is halal, such as using Arabic script and words or displaying Quranic verses as signifiers that Islamic-compliant products are sold there. However, there are problems with certification.

The main downsides of certification are price, consistency, and implementation. Often in order to achieve certification an establishment has to comply with strict guidelines in order to satisfy the certification criteria. Millar and Baloglu (2011) comment that some establishments have decided to adhere to LEED standards without spending the money to apply for certification, thus the establishment is environmentally-friendly but they lack the certification to prove they are. Henderson (2010) argues that price is an issue in the case of Sharia-compliant hotels, as facilities have to be modified and created to accommodate for the separation of genders such as spas and pools, and the inclusion of designated areas within the hotel's premises for prayer purposes. However, if facilities and lodging are designed to be sharia-compliant from the outset then the costs of such developments should be little different from that of non halal hotels.

Another downside of certification is consistency. Consistency in the standards of certification is prevalent in the case of halal certification. Abdul et al. (2009) state that there seems to be many interpretations of what constitutes an item as halal due to a lack of agreement amongst certifying bodies on the definition of halal. Abdul et al. (2009) further elaborate that due to the lack of agreement every nation seems to have their own set of guidelines of what they interpret as halal. This ranges from an ultra-orthodox interpretation present in countries like Saudi Arabia to the more liberal interpretation in countries like Turkey. Therefore, an agreement between the certifying bodies on the definition of halal is potentially needed in order to give a more accurate and consistent international certification for goods and services. Nevertheless, national and regional certification schemes may still have value for some markets and suppliers.

Implementation is another downside associated with certification. Ensuring that guidelines are being followed by establishments is a concern. Ibrahim and Mokhtarudin (2010) remark that false halal labelling is a source of worry, and Rarick et al. (2010) write that there seems to be a lack of trust amongst consumers in Malaysia and Indonesia in regards to products that are halal-certified manufactured in western or non-Muslim countries as there are concerns about the implementation of the halal guidelines in the manufacturing of said products. Ibrahim and Mokhtarudin (2010) cite the example of Klang Valley in Malaysia where there have been a lot of cases of products being falsely labelled as halal which has created a degree of mistrust and apprehension amongst the consumers in Klang Valley and Malaysia as a whole.

2.9 Rating

The star rating an establishment is awarded is an important attribute and is based on the attributes and services the accommodation provider offers (Román and Martín, 2016). An establishment's star rating is significant as it is used by potential lodgers to make judgements about an accommodation provider by providing information that could be used in the accommodation selection process (Rhee and Yang, 2015; Gu and Ryan, 2008), and to form expectations about the attributes available at a lodging (Rhee

and Yang 2015), such as cleanliness (Lockyer, 2003). However, the use of an official star rating is not utilised by many accommodation providers in New Zealand, especially motels, many of whom are self-rated by the owner of the establishment themselves (Lockyer and Roberts, 2009). New Zealand operators that do seek a star rating tend to use star ratings from Qualmark, which is New Zealand's official quality assurance organisation (Qualmark, n.d.).

Online reviews are popular amongst travellers nowadays. Online reviews are useful as they inform other consumers about a product from the point of view of a user as well as provide recommendations about the product (Zhang et al., 2011). People turn to online reviews of products as they are perceived as more trusted than the opinions of experts (Williams et al., 2010; Barreda and Bilgihan, 2013). Online reviews are also perceived as reliable, as they are meant to be written by people who have experienced the product (Williams et al., 2010). The most popular source of user generated reviews is the website TripAdvisor (Barreda and Bilgihan, 2013). TripAdvisor (as cited in Barreda and Bilgihan, 2013) mention that almost half a million hospitality businesses have user reviews. TripAdvisor allows users to write comments about an establishment, rate the establishment, and comment on the amenities on offer (Gössling et al., 2016). Reiter (as cited in Barreda and Bilgihan, 2013) mentions that TripAdvisor is also used by reviewers to plan future trips.

2.10 Halal Tourism in New Zealand

Halal tourism is being embraced by many nations worldwide, and has recently become an item receiving greater consideration by the New Zealand tourism and hospitality. Tourism New Zealand has been striving towards transforming the country into a halal-friendly destination in order to attract Muslim travellers (Bon and Hussain, 2010). New Zealand is a major producer of halal meat (Wan Hassan and Awang, 2009). However, despite it being a major supplier of halal meat, there seems to be a lack of appropriate halal food facilities in most of the country (Bon and Hussain, 2010). Muslim tourists in New Zealand expressed the difficulty they have encountered in finding halal food (Wan Hassan and Hall, 2003). The importance of halal food to Muslim tourists is unknown to several hospitality establishments in New Zealand (Wan Hassan and Awang, 2009), while some restaurants do not even want to advertise they have halal in some situations (Wan Hassan, 2010). Some Muslim tourists in New Zealand also tend to prepare their own meals when travelling (Wan Hassan and Hall, 2003).

Tourism New Zealand produced a halal food guide to be distributed internationally (Tourism New Zealand, 2012b), and has led workshops for tourism operators In New Zealand on halal markets in the Middle East and South East Asia (Tourism New Zealand, 2012a). Some of the points of the workshops is the training of front line staff and discussion of the halal guide (Tourism New Zealand 2012a).

2.11 Summary and Conclusion

Islam guides Muslims' consumption, by dictating what is permissible (halal) and what is not. The demand for halal-friendly goods and services is on the rise. In response to this rise in demand, halal

goods increasingly becoming available to consumers and have proven popular such as halal food. Halal has also found a favouring in the services industry. Many banking institutions are providing halal financial services to Muslim customers. The hospitality industry also provides halal services and halal-friendly accommodation services are garnering much attention from accommodation providers.

A number of accommodation attributes have been identified in the literature that would accommodate the needs of the halal tourist. Attributes such as the inclusion of in-rooms prayer mats and dedicating a prayer facilities within the premises would help the tourist perform their religious duties whilst travelling, the provision of halal food, and the avoidance of activities deemed as inappropriate such as consumption of Alcohol and gambling could fulfil the need of the halal tourist to abide by their religion and help raise service quality and profits via repeat purchasing a recommendations. However, businesses in the service sector in New Zealand could capitalise on the potential of halal tourism. New Zealand possesses many natural and cultural treasures that a Muslim tourist might find attractive and such tourists also need to be provided with the necessities of abiding by the religion of Islam whilst visiting this country, thus accommodation providers should cater to these needs in order to attract future business from Muslim tourists.

A number of authors have discussed halal-friendly amenities that accommodation providers can offer Muslim tourists in the literature examined. However, there is an absence of literature concerning New Zealand accommodation providers catering to the halal tourists in New Zealand.

Chapter 3: Method

3.1 Introduction

This study explores the halal-friendliness of accommodation in New Zealand. As noted in the previous chapters, the field of halal tourism is attracting the attention of a number of scholars (Carboni et al., 2014; Jafari and Scott, 2014; Battour et al., 2014). However, there are only a few academic publications that deal with accommodation attributes and their suitability for halal tourism (e.g. Battour et al., 2011; Stephenson, 2014; Henderson, 2010; Samori and Sabtu, 2014). This study draws on the general literature on halal in a tourism and hospitality context that was discussed in the previous chapter, and the accommodation attributes mentioned in Battour et al. (2011) and Stephenson (2014) in particular, to examine halal provision in the setting of New Zealand accommodation providers. Given the lack of previous research on halal accommodation and tourism in New Zealand the research is primarily exploratory in nature. A content analysis of accommodation providers' websites and secret shopper were conducted in order to explore the availability of Muslim-friendly products and services offered by accommodation providers to Muslim and other guests. In addition, the level of hospitality education provision with respect to halal was also investigated.

This chapter will detail the methodological approach of this research. The sample population will be identified, and a brief description of the two cities used in this research will be outlined. The two data collection methods (content analysis and a secret shopper used to check the results of the content analysis) used in this research are described in detail. This includes a description of each data collection method, the attributes used in each data collection method, the coding of the data, and how the data were analysed. Finally, a few limitations will be listed as to the methodological approach used in this research.

3.2 Sample design:

A census study of accommodation providers in two locations (Auckland and Rotorua) will be employed for this research.. The selection of this sampling method is due to the total number of accommodation providers in Auckland and Rotorua not being large enough for the utilisation of a random sampling method. The accommodation types used in this study will be hotels, motel, and bed and breakfast establishments, as they provide most of the attributes mentioned in the Battour et al. (2011) and Stephenson (2014) studies. Hostels, holiday parks and camp grounds were not chosen as they do not provide many of the attributes noted in the aforementioned studies.

Accommodation providers in Auckland and Rotorua were chosen for several reasons. First, Auckland was chosen as it is New Zealand's largest city. The population of Auckland is 1,415,550 (Statistics New Zealand, n.d.a), which is 31% of New Zealand's population, making Auckland New Zealand's most

populous city. The population is also New Zealand's most ethnically diverse region (McClure, 2015). According to Statistics New Zealand, Auckland's Muslim population in 2013 was estimated to be 31,155 and is the country's largest Muslim population by region. The population of Auckland has also shown an increase in declared religious affiliation, which is a contrast to the other cities in New Zealand whose populations have shown a steady decrease (Statistics New Zealand, 2014).

Second, Auckland is the country's biggest urban economy making the region attractive for business, and the region's many nature reserves and beaches, rich Maori and Polynesian heritage, and world class shopping attracts leisure tourists from around the globe (Auckland Tourism, Events and Economic Development, n.d.). Auckland is considered as New Zealand's gateway to the world. Auckland Airport, New Zealand's major transport hub, is used by over 70% of New Zealand's visitors entering or leaving the country. The airport handles over 15 million passengers per year (Auckland Airport, n.d.).

Third, Rotorua was chosen as a research location due to the city also being a major tourism hub. Rotorua is often regarded as the birthplace of New Zealand's tourism, and was built in the 1880s by the New Zealand government to host tourists (McKinnon, 2015). Rotorua has many natural wonders that make the city one of the main destinations for tourists arriving to New Zealand. The main attraction of the city are the hot springs, mud pools, and geysers that are created by subterranean geothermal activities, due to Rotorua sitting on the Taupo Volcanic Zone (Rotorua, n.d.). Rotorua's was home to the pink and white terraces, two large silica terraces considered to be the world's largest, that made them New Zealand's first tourist attraction, however the two terraces were destroyed by a volcanic eruption in 1886 (James, n.d.). The city still draws in tourists visiting the numerous naturally heated hot springs and mud pools. Rotorua also has a rich Maori heritage, and there are many Maori cultural activities on offer, from performances to traditional Maori cuisine cooked in a hot pool or by hangi (a traditional Maori method of underground cooking) (100% Pure New Zealand, n.d.b). Rotorua also has many activities for the "adrenaline junkies", such as world class mountain bike tracks, the world's highest rafting waterfall, and bungy jumping on offer. The city's population in 2013 was 65,280 with a Muslim Population of 168 people (Statistics New Zealand, n.d.b).

Both Auckland and Rotorua were featured in New Zealand halal food guides, including the halal food guide which Tourism New Zealand produced in 2013 to showcase New Zealand's restaurants, grocery shops, and fast food outlets that serve halal food.

3.3 Data Collection

This study employs content analysis and "secret shopper" data collection methods in order to achieve the research goal. The data collection took place over four months, from March 2015 to July 2015. The content analysis stage of this research was conducted between the period of March 2015 and May 2015. The results of the content analysis of accommodation providers were validated in the form of what would usually be termed a "secret shopper" exercise that was conducted between May 2015 and July

2015. In addition, information was also sought from tertiary institutions with respect to halal and culinary education between May 2015 and June 2015.

The goal of this study was to study the availability of halal-friendly attributes to Muslim tourists in New Zealand. Lists of accommodation providers for each region were compiled. Content analysis was undertaken to identify the attributes that the accommodation providers mention on their websites in communicating their offer to prospective guests.

Once the content analysis was finished, the results were checked against responses to a limited number of secret shopper questions. The list of accommodation providers developed for the content analysis were contacted by phone and were queried as to which attributes they had for halal travellers arriving from abroad. The purpose of the secret shopper exercise was to act as a “check” and counter-point to the information available on accommodation providers websites. All results are anonymous.

After the content analysis and secret shopper stage of the research, New Zealand tertiary institutions offering food preparation courses were approached with respect to the provision of information on halal hospitality and culinary training. Tertiary institutions from around New Zealand were contacted from the perspective of a prospective student wishing to study culinary arts at the institutions and requiring further information on the curriculum. This was undertaken in the absence of any information being available on their websites with respect to halal.

This research primarily draws on business information which is in the public domain and which has been accessed from artefacts such as documents and websites. This includes online information provided by businesses as well as organisations such as Qualmark and TripAdvisor. No personal information of a sensitive nature about or from individuals has been gathered. Nevertheless, all results have been anonymised unless information is available to the general public, as in the case of advertising and promotional information from accommodation providers, to provide illustrative examples. No identifying information is used to link a specific accommodation provider’s responses to the secret shopper questions that were used to check the results of the content analysis. All results are aggregated.

3.4 Content analysis

The first stage of this study was a content analysis of the accommodation providers’ websites in Auckland and Rotorua. With the advent of technology, service providers are increasingly turning to digital media in order to communicate their offering to consumers. Websites have evolved beyond the traditional medium of offering basic and essential information into a medium through which businesses can create the first positive impression about itself in the minds of potential customers viewing those websites at home (Halpern and Regmi, 2013). Hospitality websites are a source to acquire information to form opinions about businesses and destinations that might help customers evaluate options and make purchasing decisions (Hashim et al., 2007). The high percentage of businesses having their own websites has created an abundance of information and a competition to attract consumers’ attention,

therefore, businesses have to identify and craft the information they use on their websites on order to attract the viewers' custom (Hall and Valentin, 2005; Lee and Gretzel, 2012). As well as information, website design can also play a part in influencing purchase decisions (Phelan et al., 2011). However, although the use of websites is prevalent in the hospitality industry, many hotels might not make the best use of their websites to communicate certain information to the public as they might not deem that information as important (Jenkins and Karanikola, 2014). Content analysis is best used to examine the content of a service provider's website communication (Halpern and Regmi, 2013).

Content analysis has been defined as "*a systematic, replicable technique for compressing many words of text into fewer content categories based on explicit rules of coding*" (Stemler, 2011, p. 137). Content analysis is a useful instrument as it allows the researcher to sort through a volume of information in order to reduce the relevant information and sort it into predetermined categories (Harwood and Garry, 2003; Hall and Valentin, 2005).

There have been some applications of the content analysis research method in the tourism and hospitality industry. Researchers can use the content analysis method to investigate what tourists think of a city by analysing the content of web travel blogs (Son, 2011), to investigate the destination image of a country and the brand image of Korea through the analysis of the content of the most popular tour guidebook for Korea (Kim and Yoon, 2013), or to identify trends in the Portuguese tourism and hospitality sectors through the analysis of six years' conference proceedings of The Portuguese Hotels Association Conferences (Ramos et al., 2000).

Content analysis can be useful to study accommodation issues. Content analysis can be helpful to explore the experience guests had whilst staying at a specific hotel by analysing the online review those guests wrote on an online travel review website (Barreda and Bilgihan, 2013) and get an insight into hotel operations, such as the study by Nyahunzvi (2013) who studied the reporting of corporate social responsibility by Zimbabwean hotels. Content analysis can also be used to analyse accommodation providers' websites, such as the study by Musante et al. (2009), who studied hotel website attribute utilization and effectiveness.

This study used attributes identified by Battour et al. (2011) and Stephenson (2014), among others, to compile a list of halal attributes suitable for Muslim tourists. The attributes are then used as the criteria for analysis of the information available on the websites of accommodation providers in Auckland and Rotorua.

In the absence of reliable regional databases of accommodation providers a number of tourism industry websites and online directories were used to compile listings of accommodation providers in Auckland and Rotorua. The sources used are Auckland's official tourism website (www.aucklandnz.com), Rotorua's official tourism website (www.rotoruanz.com), Tourism New Zealand's website (www.newzealand.com), Qualmark's website (www.qualmark.co.nz), New Zealand Automobile

Association (AA)'s travel website (www.aatravel.co.nz), and New Zealand Yellow Pages Website (www.yellow.co.nz). Online travel review website TripAdvisor (www.tripadvisor.com) was also used in order to create a complete a list as possible of Auckland and Rotorua's accommodation providers, as well as providing the lodging's online review score. A total number of 412 accommodation providers were identified. A total of 289 accommodation providers in Auckland (69 hotels, 121 motels, and 99 bed and breakfasts) and a total of 123 accommodation providers in Rotorua (19 hotels, 66 motels, 38 bed and breakfasts).

3.4.1 Content Analysis Attributes

A total of 34 accommodation attributes were sought in the content analysis as well as the city the accommodation provider is located in, the type of accommodation provider, and the number of rooms the establishment has (Table 3.1).

Table 3.1: Attributes utilised in the content analysis

Attribute	Battour et al. (2011)	Stephenson (2014)	Other publications	Other comments
Pool	Yes	Yes	Abdul Majid et al. (2015), Henderson (2010), Saad et al. (2014), Samori and Sabtu (2014),	Whether an accommodation provider has a pool. Many articles in halal tourism mention that swimming pools need to be segregated.
Gym	Yes	Yes	Abdul Majid et al. (2015), Henderson (2010), Samori and Sabtu (2014), Yaman et al. (2012)	Whether an accommodation has a gym or health club facilities on-site. Fitness facilities were mentioned in many academic articles, in the context of halal tourism, fitness facilities need to be gender segregated.
Day Spa	No	Yes	Abdul Majid et al. (2015), Yaman et al. (2012)	Whether the accommodation provider has a day spa on-site. The day spas need to be gender segregated.
Sauna	No	No	Caber and Albayrak (2014), Yaman et al. (2012)	Whether the accommodation provider has a sauna on-site.
Spa	No	Yes	Abdul Majid et al. (2015), Henderson (2010), Yaman et al. (2012), Zhang et al. (2011)	Whether the accommodation provider has a spa pools or spa baths on-site. Relevant literature mentions that spas need to be gender segregated.
Gambling	Yes	Yes	Battour et al. (2014), Hashim et al. (2007), Samori and Sabtu (2014),	Is there an indication of the accommodation has or is in close proximity to gambling

				establishments (casinos, TAB, racecourses).
Food Served On-premises	Yes	Yes	Mohsin (2007)	Accommodation provider mentioning they serve food on their premises. The accommodation provider does not have an onsite dining facility but do offer a breakfast to guests (part of the accommodation or ordered).
In-unit Cooking	No	No	Lockyer and Roberts (2009), Yusof and Shutto (2014)	Accommodation provider indicating they have in-unit cooking.
On-site Dining facility	Yes	Yes	Mohsin (2007)	Accommodation provider indicated they have on-site dining facility (restaurant, café, barbecue facilities).
Alcohol Available On-premises	Yes	Yes	Saad et al. (2014), Samori and Sabtu (2014),	Accommodation provider indicates alcohol is available on-site. Accommodation provider does not have a bar but does serve alcohol to guests in-premises.
Bar Onsite	Yes	No	Samori and Sabtu (2014),	Accommodation provider indicates there is a bar on-site.
Room Service	No	No	Mohsin (2007), Zhang et al. (2011)	Accommodation provider indicates they offer room service.
Mini-Bar	Yes	No	Samori and Sabtu (2014),	Accommodation provider indicates there is an in-room mini bar.
Entertainment	Yes	Yes	Henderson (2010), Saad et al. (2014), Samori and Sabtu (2014),	Accommodation provider indicated they provide entertainment to guests.
Offer Halal	Yes	Yes	Battour et al. (2012), Henderson (2010), Jafari and Scott (2014), Saad et al. (2014), Samori and Sabtu (2014), Yener (2015)	Accommodation provider indicated they offer halal food.
Halal Certified	No	Yes	Marzuki et al. (2011), Yener (2015)	Accommodation provider indicated that the halal food served is halal certified.
Vegetarian Options	No	No	Yusof and Shutto (2014), Jamal and Sharifuddin (2015)	Accommodation provider indicates they offer vegetarian food options.
Gluten-Free Options	No	No	Jamal and Sharifuddin (2015)	Accommodation provider indicates they offer gluten-free food options

Dairy-Free Options	No	No	Ireland and Rajabzadeh (2011), Jamal and Sharifuddin (2015)	Accommodation provider indicates they offer dairy-free food options Jamal and Sharifuddin (2015) mention that some Muslims might be sensitive to consuming dairy products that might not be halal, this might be due to some ingredients in the production being deemed not halal, such as rennet when making cheese (Al-Mazeedi et al., 2013).
Offer Off-premises Food	No	No	No	Whether the accommodation provider offer off-premises food. Many accommodation provider websites mentioned that they offer a charge back service from nearby food outlets.
Cater to Special Dietary Needs	No	No	No	Accommodation provider indicates they cater to special dietary needs. Some websites mentioned that the accommodation provider can cater to some dietary needs upon request.
Qibla Marker	Yes	Yes	Abdul Majid et al. (2015), Battour et al. (2012), Henderson (2010), Samori and Sabtu (2014)	Accommodation provider indicates they offer prayer direction (Qibla) markers in their rooms. This attribute would enable a Muslim guest to face the direction of Mecca when praying.
Prayer Mat	Yes	Yes	Abdul Majid et al. (2015), Battour et al. (2012), Saad et al. (2014), Samori and Sabtu (2014)	Accommodation provider can provide a prayer mat in guest's room.
Prayer Times	Yes	Yes	Battour et al. (2012), Samori and Sabtu (2014)	Accommodation provider indicates they offer prayer times to guests. This attribute would allow the guest to perform the five daily prayers at the appropriate times.
Religious Needs	Yes	Yes	Weidenfeld and Ron (2008)	Accommodation provider indicates they cater to guests' religious needs. The website mentions that the accommodation provider would cater to a guest's religious needs.
Regards to Red-light District	Yes	No	No	If there is an indication of the accommodation's close proximity to adult entertainment areas and red-light districts.

Quran In-room	Yes	Yes	Henderson (2010), Saad et al. (2014), Samori and Sabtu (2014)	Accommodation provider mentions that they will provide a copy of the Quran to Muslim guests in their room.
Female Only Floors	No	No	Abdul Majid et al. (2015), Henderson (2010), Samori and Sabtu (2014)	Accommodation provider has female only floors.
In-room Decorations	No	Yes	Samori and Sabtu (2014)	Accommodation provider mentions in-room decorations on their website.
Prayer Facility	Yes	Yes	Abdul Majid et al. (2015), Saad et al. (2014),	Accommodation provider has a dedicated area for Muslim to pray on their premises.
Caters To Special Needs	No	No	Battour et al. (2014)	Accommodation provider caters to special needs (family friendly, pet friendly).
Multilingual Staff	No	No	Choi and Chu (2001)	Accommodation has multi-lingual staff.
Gender Segregated Facilities	Yes	Yes	Abdul Majid et al. (2015), Battour et al. (2014), Saad et al. (2014),	Accommodation provider indicated they have gender segregated facilities. Any swimming pools, gyms, day spas, or spas that were mentioned as being gender segregated were noted here.
Mention Halal	Yes	Yes	Hashim et al. (2007)	If accommodation provider mentions halal anywhere on their website.

The content analysis also includes whether the accommodation provider has a Qualmark rating (New Zealand's official quality assurance organisation, accommodation ratings range from 1 star to 5 star are "*in accordance with recognised international convention*" (Qualmark, n.d.)) and/or Qualmark Enviro rating (for businesses that meet Qualmark's environmental and social criteria (Qualmark, n.d.)), as well as the accommodation provider's online rating on TripAdvisor (travel-related website offering people reviews of travel and tourism services as well as being a travel company).

The attributes are categorised in Microsoft Excel.

3.4.2 Coding

The information on each website visited was coded to enable more detailed analysis of the site attributes (see Appendix B). These include: the location of the accommodation provider in either Auckland or Rotorua; the type of accommodation provider (bed and breakfast, motel, or hotel. The attributes available at the accommodation provider were also identified by being denoted as being available or not.

Accommodation provider's Qualmark ratings were also recorded (3-5 star and no rating) as were the Qualmark Enviro ratings (Bronze, Silver, Gold, and unrated). None of the accommodation providers had a rating lower than 3 stars, therefore, the rating Qualmark ratings 1-2 stars were omitted. The lodging's online rating on the TripAdvisor website was also included in the content analysis.

3.4.3 Analysis

Once the website content data was collected, a series of tables were created (see Chapter 4). These include the attributes analysed in the content analysis, the total number of times the attributes were mentioned on the websites, and the calculated percentages of the frequency the attributes were mentioned from the total number of accommodation providers. Primarily, chi-square tests, t-tests and ANOVA were used to identify significant associations and relationships in the dataset.

3.5 Secret Shopper

After the content analysis was completed, a secret shopper research method was utilised in order to be able to compare the results of what could be identified with respect to halal accommodation attributes on the providers' website versus what businesses may believe their website states as well as what they may communicate to a halal customer directly. The use of a secret shopper or a similar approach to cross-check the results of content analysis is reasonably common (Ritchie et al., 2005), including specifically with respect to looking at Islamic tourism and hospitality websites (Hashim et al., 2007; Hashim and Murphy, 2008).

Wilson (1998, p. 148) defines mystery shopping as "*uses researchers to act as customers or potential customers to monitor the processes and procedures used in the delivery of a service.*" Secret shopper or mystery shopper research methods have been employed by many industries, including the hospitality industry, for quality assurance and service delivery purposes as well as to study the competition (Beck and Miao, 2003; Allison et al., 2010). Predetermined codes and lists are utilised in mystery shopping to gather and assess a service experience (Wilson, 1998). Van Der Wiele et al. (2005) mention that mystery shopping is a useful tool to use to get an understanding of the service delivered to consumers and the quality of the said service's delivery. An illustration of the usefulness of mystery shopping in the hospitality industry is the research conducted by Huang et al. (2014) to explore the customer experience in the Chinese economy hotel sector. The authors in the Huang et al. (2014)'s research stayed in a number of economy hotels in mainland China and evaluated their lodging experience. Some of the matters studied were staff conduct, check in/check out service, and room facilities. The exploratory research conducted by Huang et al. (2014) yielded some valuable information and an insight into the physical setting and social interactions of the emerging economy hotel market in China. Secret shopping is conducted in other areas of the service industry as well. Pinar et al. (2009) used mystery shopping to assess the quality of the service in Turkish banks, where various forms of banks' services were scrutinised, and Rood and Dziadkowiec (2010) analysed the expectations of restaurant diners in the

United States and Poland. In the case of the present study the secret shopper exercise was not used to look at the wider service attributes of the accommodation providers nor did it deal with any information with respect to individuals. Rather the approach was used to confirm the availability of specific halal attributes that had been previously identified in the content analysis of accommodation provider websites. The approach therefore serves to function, as Madlberger (2004) notes, as an analogue to mystery shopping in store-based retailing.

This study aims to find halal accommodation attributes, thus a secret shopper research method was utilised, along with the results of the content analysis of accommodation websites, to examine from a potential customer's point of view which accommodation providers are able to cater to a Muslim guest's needs. This was especially significant given the relative lack of information availability on many accommodation websites. In addition, New Zealand's tertiary institutions were contacted in order to discover if halal food preparation is the tertiary institutions' cookery course curriculum. This was also conducted as an analysis of institutional websites and brochures could find no identifying course information.

3.5.1 Accommodation Provider Secret Shopper

The accommodation providers list used in the content analysis was used for the secret shopper. The accommodation providers were contacted via phone by the researcher who played the role of a New Zealander based in Auckland who is expecting visitors from overseas. There were three versions of the script and the most used example is provided below:

The visitors will be the caller's friends and are a couple, one of which is Muslim and the other one is Jewish. A couple was chosen as it is the number of guests catered to by all accommodation providers (most bed and breakfasts do not cater to families with children or groups more than two people). The following script was used during the phone call. This was also developed on the basis of the researcher's own experiences and interests with respect to accommodation and hospitality provision for Muslim and non-Muslim guests:

"Hi, I've got an inquiry. A couple of my friends are coming to New Zealand from overseas next month and because one is Jewish and the other is Muslim, they've have some specific dietary needs, so I'm just wondering what type of food do you serve at your place?

Would you be able to provide a halal meal and a kosher meal? How about a vegetarian, dairy free or gluten free options?

Also because my friend is a Muslim she needs to be facing Mecca when she prays so would to provide her with a direction marker to let her know which way Mecca is and daily prayer times? Would you be able to provide her with a space for her to pray in?"

The script aimed to extract information in regards to the provision of halal and special dietary needs that were attributes that had also been searched for in the content analysis. Where there was a lack of certified halal food, then the vegetarian option (Yusof and Shutto, 2014; Jamal and Sharifuddin, 2015), the gluten-free option (Jamal and Sharifuddin, 2015), and the kosher options (Wilson and Liu, 2011) are also considered halal according to the Muslim guidelines. Three versions of the script were created with slightly different settings. A family version (consisting of two parents and two children) was created, a group of friends (three or four) arriving in New Zealand from overseas version was created, and couple (male and female) version were created. As mentioned above the couple version was chosen as it allowed for the suitability to all types of accommodation providers (the family could not stay at a bed and breakfast and a few establishments mentioned that their place was not suitable for children, and the friends version exceeded the number of guests allowed at many bed and breakfasts). A few changes were made to the couple script so as to have the notion of a New Zealand-based friend looking for a suitable accommodation for her New Zealand-bound friends who have particular dietary and accommodation needs. The script was trialled by the researcher on a few people so as to test the suitability of the script. It should also be noted that the researcher is Muslim herself and the script reflects her own experiences and interests in seeking to find suitable accommodation for herself, friends and family and these experiences informed both the script and the conversations that took place. Once the script was fine-tuned and its consistency was assured, then information gathering took place.

3.5.2 Content Analysis and Coding

All the accommodation providers used in the website content analysis that responded to the secret shopper questions were included in the analysis. Given the nature of the exercise the coding was the same as that of the website analysis with respect to location, accommodation category, and the establishment's Qualmark rating, Qualmark Enviro rating, and TripAdvisor rating. In addition, categories were included for serving of vegetarian food, continental breakfast, halal food, kosher food, and the availability of other food options (such as dairy free and gluten free). Categories were also included for each business on the availability of a direction marker, prayer times, and space for prayer were indicated (Appendix C). Any other comments that were deemed relevant were also noted. No other business information was gathered nor any personal information.

3.5.3 Data Analysis

Once all the data had been collected, the attributes examined in the secret shopper stage were listed together with the total of responses for each attribute and the percentage of the responses. The secret shopper data was compared with the content analysis data in order to find any differences in the results of the two research methods. Again, chi-square tests, t-tests and ANOVA were used to identify relationships in the dataset.

3.6 Halal Education in Tertiary Institutions

The final phase of the study was an examination of the cookery curriculum offered by New Zealand's tertiary institutions. The aim of this phase in the research was to explore if halal food preparation is part of a New Zealand institutions' curriculum, as those courses are undertaken by trainee chefs in order to study the culinary arts. Knowledge of halal food preparation would enable a chef to prepare halal food, and thus the food establishment can cater to the halal tourist when they request halal food. Initially, websites and brochures were read to try and ascertain the extent of halal food training in New Zealand. However, no explicit mention of halal food training could be identified on any of their sites or documents. Therefore, it was decided to approach institutions directly.

In order to gather data, 14 polytechnics and one university which offer a degree in hospitality were contacted. The Polytechnics were Open Polytechnic, Bay of Plenty Polytechnic, Otago Polytechnic, Nelson Marlborough Institute of Technology, Aoraki Polytechnic, Wintec, Weltec, Whitireia, Unitec, Christchurch Polytechnic Institute of Technology, Eastern Institute of Technology, UCOL, Te Wananga O Aotearoa, And Manukau Institute of Technology. The University was Auckland University of Technology (AUT).

3.6.1 Data Collection

The polytechnics and university were contacted via telephone, the following script was used for this activity:

"Hello, I'm interested in learning about halal and kosher food preparation, and I'm just wondering if you offer courses that teach that or is part of your cookery course curriculum? Also do you have dairy free and gluten free as part of your curriculum?"

Respondents that offer halal food preparation courses were noted with a "yes", and respondents that did not offer halal food preparation courses were noted with a "no". Additional comments responses from the respondents were also noted.

3.7 Limitations

The main limitation faced in this research is that there is no complete list of all the accommodation providers in Auckland and Rotorua. The list had to be compiled by searching through the websites and contact details for accommodation providers from many online and offline sources such as tourism websites, directories and phone books.

A second limitation is the number of accommodation providers that did not have their own websites. While a majority of accommodation providers have their own websites that they use to inform prospective guests about the services they have to offer, a total of 48 (11.7%) accommodation providers were omitted as they did not satisfy the criterion of the content analysis of having a website.

Another limitation is the amount of information included in the accommodation providers' websites. Accommodation providers might only share information about services they offer that might appeal to a wide range of audience (such as offering free Wi-Fi or dry-cleaning, services) and might not have information about specific services that appeal to a limited audience (such as halal services or halal or kosher food on offer). Indeed, the availability of information on websites – for whatever reasons – has become one of the interesting issues that this thesis

A final limitation with respect to seeking further information from tertiary institutions with respect to halal education was the level of knowledge of those answering requests for information. As the tertiary institutions were contacted via the all enquiries number listed on the tertiary institutions' websites, the person answering the call might not have extensive knowledge of the specific details of the curriculum offered by the tertiary institutions, such as knowledge of specific food preparation techniques for instance halal food preparation, or be able to pass you on to the right contact person/department but would still aim to try and answer the question themselves. This would lead to the tertiary institution being identified as not having a halal food preparation portion of the curriculum where there might be such a food preparation technique taught as part of the course. However, wherever possible request for information were also put through to relevant culinary arts staff.

3.8 Chapter Summary and Conclusions

This study's main goal is to explore the availability of halal friendly accommodation attributes in New Zealand. This study analysed New Zealand's accommodation providers in Auckland and Rotorua. Data collection was done by utilising a content analysis and two secret shopper exercises. The content analysis phase examined the accommodation providers' websites in order to document the halal friendly attributes mentioned on the websites. The first secret shopper phase was conducted by contacting the accommodation providers used in the content analysis and asked in the form of an accommodation inquiry if they serve halal food and if they would provide a Muslim guest with services that would enable the guest to perform their religious duty. The aim of the second secret shopper was to explore if halal food preparation was part of the culinary arts curriculum.

Both methods of data collection were described briefly and applied into this study. A list of attributes extracted from a number articles, but mainly from the Battour et al. (2011) and Stephenson (2014) studies, were also identified. The next chapter discusses the results of this study.

Chapter 4: Results

4.1 Introduction:

This chapter describes the results of this study. First, the results of the content analysis on accommodation providers' websites are reported with the objective of identifying halal-friendly accommodation attributes and other general attributes offered in New Zealand. The results are based on the identification of statistically significant associations, using chi-square tests, between the attributes and for example, the accommodation provider's location and type. ANOVA was used to identify significant differences in average ratings of accommodation based on availability of some attributes.

Second, the results of the secret shopper stage of the study are reported. Accommodation providers were contacted by phone and were queried about the availability of halal-friendly attributes for two prospective guests. Many of the attributes used in this stage of the study are similar to the content analysis but are also attributes that a Muslim guest would require in order to adhere to their faith and perform their religious duties. Chi-square tests were used to identify associations between the availability of attributes and the accommodation provider's location and type. ANOVA was used again to identify differences in average ratings of accommodation.

In the final section of the chapter, the results of 15 telephone interviews with New Zealand tertiary institutions on the topic of halal in tertiary education study are described. The main objective of this stage was to identify if halal food preparation is part of these tertiary institutions' culinary arts curriculum.

4.2 Results of Content Analysis

A total of 364 accommodation providers' websites were analysed for the content analysis stage. However, given the aim of the study, which was to quantify the number accommodation providers offering halal accommodation options to visitors, only accommodation providers with active websites were used for the content analysis. A total of 48 accommodation providers were excluded from this stage of the analysis as they did not meet the criteria of having a website or having an invalid website address. Of the total number of active accommodation providers' websites, 103 (28.3%) were for bed and breakfasts (B&B), of which 69 (27.38%) are in Auckland and 34 (30.36%) are in Rotorua. Of the total number of accommodation providers, 85 (23.35%) were hotels, of which 68 (26.98%) were in Auckland and 17 (15.18%) were in Rotorua. The last category of accommodation providers investigated was motels, which represented 176 (48.35%) out of the 364 accommodation providers. Of these motels, 115 (45.63%) were in Auckland and 61 (54.46%) were in Rotorua as shown in table 4.1.

Table 4.1 Accommodation types and Location

Establishment vs. Location		Location		
Type Of Establishment		Auckland	Rotorua	Grand Total
B&B		69 (27.38%)	34 (30.36%)	103 (28.30%)
Hotel		68 (26.98%)	17 (15.18%)	85 (23.35%)
Motel		115 (45.63%)	61 (54.46%)	176 (48.35%)
Grand Total		252 (69.23%)	112 (30.77%)	364 (100%)

4.2.1 Halal Attributes:

A number of halal-friendly accommodation attributes were identified from the literature (Battour et al., 2011; Stephenson, 2014; Abdul Majid et al, 2015; Yaman et al., 2012) and the objective of the content analysis stage was to identify whether these attributes are available in New Zealand accommodation such as the offering of halal food and the provision of items a halal tourist needs in order to pray in their rooms (Qibla markers, prayer mats, or prayers times). Other attributes that affect a halal tourist's choice of accommodation were also identified in the literature (Battour et al., 2011; Stephenson, 2014) and used in the content analysis such as whether the website mentions whether an establishment is close to a gambling facility or red light district, if alcohol is served in the establishment, and whether an establishment has gender segregated facilities.

The analysis also sought to identify general accommodation attributes such as whether special dietary requirements (other than halal) are catered to, availability of a pool on-site, multilingual staff, and room service offered amongst others. Most of these general attributes are mentioned in the halal-friendly literature (Battour et al., 2011; Stephenson, 2014; Samori and Sabtu, 2014) as well as the literature (Stauss and Mang, 1999; Jones and Chen, 2011; Stoller, 2005) relating to the importance of hotel attributes' to guests in general.

Almost all of the halal-friendly attributes mentioned in the literature were not mentioned on the accommodation providers' websites. As shown in table 4.2, two halal-friendly attributes were mentioned on the websites examined. The offering of halal food was the first attribute available. A total of only three accommodation providers (0.82%) out of the total number of accommodation providers examined mentioned the availability of halal food on-premises, and only one accommodation provider (0.27% of the total websites) stated that they have halal certified items. The second halal attribute mentioned was the availability of gender segregated facilities. Seven websites (1.92%) mentioned the availability of gender segregated facilities, and such facilities were in relation to gyms, day spas, saunas, and pools.

All the other halal-friendly attributes (the provision of a Qibla marker, the provision of a prayer mat, the provision of prayer times, the provision of a Quran in-room, female only floors, and the designation of a special area for prayer) were not mentioned by any of the websites examined.

Table 4.2 Accommodation attributes frequency and percentage

	Frequency	Percentage
<i>Halal Attributes</i>		
Offer Halal food	3	0.82
Halal certified food	1	0.27
Qibla marker	0	0
Prayer mat	0	0
Prayer times	0	0
Quran in-room	0	0
Female only floors	0	0
Prayer Facilities	0	0
Segregated facilities	7	1.92
Halal Mentioned	3	0.82
<i>Haram Attributes</i>		
Gambling	32	8.79
Bar On-site	103	28.30
Alcohol available on premises	130	35.71
Location to red-light district	0	0
<i>Special Attributes</i>		
In-unit cooking	233	64.01
Vegetarian	40	10.99
Gluten free options	33	9.07
Dairy free options	12	3.30
Offer off-premises food	13	3.57
Cater special dietary needs	23	6.32
Religious needs	1	0.27
In-room decorations	28	7.69
Caters to special needs	96	26.37
Multilingual staff	57	15.66
<i>General Attributes</i>		
Pool	118	32.42
Gym	66	18.13
Day spa	15	4.12
Sauna	33	9.07
Spa	182	50
Food Served on premises	242	66.48
Onsite dining facility	173	47.53
Room service	152	41.76
Mini bar	68	18.68
Entertainment	265	72.80

<i>Qualmark rating</i>		
No Qualmark rating	253	69.51
Qualmark rating of 3	3	0.82
Qualmark rating of 3 Plus	17	4.67
Qualmark rating of 4	36	9.89
Qualmark rating of 4 Plus	35	9.62
Qualmark rating of 5	20	5.49
<i>Qualmark Enviro rating</i>		
No Qualmark Enviro rating	314	86.26
Qualmark Enviro rating of Bronze	12	3.30
Qualmark Enviro rating of Silver	25	6.87
Qualmark Enviro rating of Gold	13	3.57
<i>TripAdvsior rating</i>		
No TripAdvisor rating	23	6.32
TripAdvsior rating of 1	0	0
TripAdvsior rating of 1.5	2	0.55
TripAdvsior rating of 2	5	1.37
TripAdvsior rating of 2.5	14	3.85
TripAdvsior rating of 3	38	10.44
TripAdvsior rating of 3.5	50	13.74
TripAdvsior rating of 4	84	23.08
TripAdvsior rating of 4.5	72	19.78
TripAdvsior rating of 5	76	20.88

Next, chi-squared tests were used to identify whether there were significant associations between the availability of halal-friendly attributes and establishment's type as well as location. The results showed that were no statistically significant relationships at the 5% level of significance.

4.2.2 Ratings and Halal Attributes

Using chi-square tests, the Qualmark rating and Qualmark enviro rating of each accommodation were used to identify significant associations between the availability or not of halal friendly attributes and the different ratings. The results indicated no significant associations between these variables. Based on availability or non-availability of the halal attributes, t-tests were used to identify significant differences in average TripAdvisor ratings of these accommodation providers. Unsurprisingly, the results showed no statistically significant differences in average ratings. Overall, the results indicate that websites do not report halal friendly amenities irrespective of location, and accommodation type.

4.2.3 Haram Attributes

As suggested in the literature (Battour et al., 2011, Stephenson, 2014; Samori and Sabtu, 2014; Hashim et al., 2007), the mentioning of some attributes by accommodation providers on a website might lead halal tourists to avoid such providers. Accommodation attributes such as close proximity to gambling facility, bar onsite, alcohol served on premises, and close proximity to red light district were labelled as haram attributes in this study. As shown in table 4.2 a total of 32 websites (8.79%) mentioned the accommodation provider's close proximity to or the availability of an onsite gambling facility. Specifically, for example, some motels mentioned that their establishment was within "a walking distance to a racecourse" or they had "pokies" (poker machines) onsite. A total of 130 websites (35.71%) mentioned that alcohol was served on-premises, whilst a total of 103 websites (28.30%) mentioned that the accommodation provider has a bar onsite. None of the accommodation providers mentioned whether their establishment was in close proximity to red light districts.

The results of chi-square tests revealed some significant associations between haram attributes and type of establishment as well as location. For example, there was a statistically significant association ($\chi^2=15.12$, $p=0.001$) between type of establishment and closeness or availability of onsite gambling facilities. A higher percentage of motels (75%) were close to or had onsite gambling facilities in comparison to hotels (25%). The availability of a bar on-site was more prominent among hotels (67%) in comparison to motels (21.4%) and B&Bs (11.6%). This association was statistically significant ($\chi^2=152.86$, $p=0.000$). Also, there was a significant association between location and availability of on-site bars ($\chi^2=8.69$, $p=0.003$), with accommodation providers in Auckland (80.6%) having more of this attribute than Rotorua (19.4%). A higher percentage of hotels (53.8%) were serving alcohol on premises in comparison to motels (18.5%) and B&Bs (27.7%) and this association was statistically significant ($\chi^2=117.92$, $p=0.000$). Accommodation providers in Auckland (76.9%) were serving alcohol on premises more than accommodation providers in Rotorua (23.1%) and this association was statistically significant ($\chi^2=5.62$, $p=0.018$).

4.2.4 Ratings and Haram Attributes

Significant associations between the various accommodation ratings (Qualmark and TripAdvisor) and the haram attributes were also investigated. The results revealed a significant association between alcohol served on premises and Qualmark ratings ($\chi^2=32.29$, $p=0.000$). Four-star (17.7%) and five-star (10.8%) rated accommodation had higher percentages of alcohol served on premises in comparison to three-star (0.8%) and three-star plus (4.6%) accommodation. On the attribute 'bar on-site', a similar association ($\chi^2=48.34$, $p=0.000$) was found among higher Qualmark rated hotels, four-star (15.5%), four-star plus (21.4%) and five-star (11.7%) in comparison to lower rated Qualmark accommodation, three-star (1%) and three-star plus (5.8%), as shown in table 4.3. A higher percentage of Silver (14.6%) and Gold (10%) environmental rated accommodation providers served alcohol on premises than Bronze

(2.3%). This association was statistically significant ($\chi^2=45.75$, $p=0.000$). A similar association ($\chi^2=48.92$, $p=0.000$) was also evident among the same categories of environment rating (Silver and Gold) that had higher percentages for availability of bar on site in comparison to Bronze environment rated accommodation. An independent sample t-test also revealed that the average TripAdvisor rating for accommodation providers that served alcohol on premises were higher ($M=4.01$) compared to those that did not mention this attribute on their website ($M=3.65$). This difference was statistically significant ($t=-3.03$, $p=0.003$).

Table 4.3 Qualmark Rating and Bar Onsite

Qualmark Rating/ Bar Onsite	Not Mentioned	Yes
No mention	207 (79.3%)	46 (44.7%)
3 Star	2 (0.8%)	1 (1%)
3 Star plus	11 (4.2%)	6 (5.8%)
4 Star	20 (7.7%)	16 (15.5%)
4 Star plus	13 (5%)	22 (21.4%)
5 Star	8 (3.1%)	12 (11.7%)
Total	261	103

4.2.5 Special needs

A number of attributes relating to the ability of the accommodation providers to cater to guests' with special needs were also analysed. For example, catering of special diets was examined as well as the mentioning of the in-room décor, in-unit cooking facilities, multilingual staff, and the ability to cater to special needs. A total of 40 websites (10.99%) mentioned that they offer vegetarian food options. A total of 33 websites (9.07%) mentioned that they offered gluten free food options, whilst a total of 12 websites (3.30%) revealed that they serve dairy free options. There was information on a few accommodation providers' websites that indicated their ability to cater for special dietary needs. A total of 23 websites (6.32%) mentioned this accommodation attribute with some websites alluding to having special dietary menus such as nut free or healthy meal options whilst others mentioning that they can cater to special dietary needs without giving specifics. A total of 13 websites (3.57%) stated that the accommodation provider can provide food from off premises establishments and add the price of the meal to their accommodation cost.

The websites were also reviewed to identify whether accommodation providers were able to accommodate unique guest arrangements, such as being pet friendly or family friendly. A total of 83 websites (22.80%) mentioned that the accommodation provider was family friendly, whilst 20 websites (5.49%) were pet friendly, and a total of 10 websites (2.75%) were pet and family friendly. A total of 57 websites (15.66%) suggested the accommodation provider has multilingual staff.

The mention of in-room facilities such as décor and in-room cooking facilities were also analysed. A total of 28 websites (7.69%) mentioned the room's décor, however, the descriptions were almost exclusively in relation to the room's colour scheme, including descriptions of how the colours were chosen to please guests and will help them to relax. A total of 233 accommodation providers (64.01%) mentioned that the availability of cooking amenities in their guest units, where guests are able to prepare their own meals. The mentioned in-room cooking facilities were kitchens or kitchenettes that had a stove, fridge, pots, kitchenware, and dining utensils.

4.2.6 Special Attributes and Accommodation Types/Location

Chi-square tests revealed several significant associations between the provision of amenities and facilities catering for special needs and accommodation types. For example, there was a significant association between the provision of in unit cooking facilities and types of establishment ($\chi^2=131.55$, $p=0.000$). In-unit cooking facilities were more prominent among motels (70.4%) than hotels (16.7%) and B&Bs (12.9%), as shown in table 4.4. There were also significant associations between establishment types and the provision of special food requirements such as vegetarian ($\chi^2=61.24$, $p=0.000$), gluten free ($\chi^2=57.42$, $p=0.000$), dairy free ($\chi^2=24.98$, $p=0.000$). A higher percentage of hotels were catering for these food requirements in comparison to motels and B&Bs, as specified on their websites. A significant association was also found between the availability of multilingual staff and type of establishment ($\chi^2=95.91$, $p=0.000$). A higher percentage of hotels (73.7%) mentioned multilingual staff in comparison to motels (14%) and B&Bs (12.3 %).

Table 4.4 Type of Establishment and In-unit Cooking Facilities

Type of Establishment/ In-unit cooking	Not Mentioned	Yes
B&B	73 (55.7%)	30 (12.9%)
Motel	12 (9.2%)	164 (70.4%)
Hotel	46 (35.1%)	39 (16.7%)
Total	131	233

In terms of location and the provision of amenities and facilities that cater for special needs, chi-square tests revealed some significant associations. There was a significant association between the provision of vegetarian ($\chi^2=7.04$, $p=0.008$) and dairy-free food options ($\chi^2=5.52$, $p=0.019$) and location. Accommodation providers in Auckland had higher percentages of these attributes than Rotorua. Availability of multilingual staff was more prominent among Auckland accommodation providers (84.2%) than Rotorua (15.8%) and this association was statistically significant ($\chi^2=7.11$, $p=0.008$).

4.2.7 Special Needs and Qualmark/TripAdvisor Ratings

Several significant associations were found between Qualmark environmental ratings and the availability of some amenities such as the availability of a special meal option. Silver (32.5%) and Gold (17.5%) rated establishments showed higher percentages for the availability of a vegetarian food option

than Bronze (2.5%) rated establishments. This was a statistically significant association ($\chi^2=73.31$, $p=0.000$). Silver (17.5%) and Gold (15.8%) environment rated accommodation had higher percentages for multilingual staff than Bronze (5.3%) and this association was statistically significant ($\chi^2=45.09$, $p=0.000$). There was no statistically significant difference in average TripAdvisor ratings based on the availability of any of the specific amenities or facilities.

4.2.8 General attributes

General accommodation attributes were also identified in the content analysis stage and included general amenities. For example, health and fitness amenities such as swimming pool, sauna, gym, day spa, or spa were analysed. A total of 118 websites (32.42%) mentioned that the accommodation provider had at least one swimming pool onsite. A total of 182 websites (50%) mentioned that the accommodation provider had a spa pool or spa bath onsite. A total of 15 websites (4.12%) mentioned they had a day spa at their facilities. A total of 33 websites (9.07%) mentioned the availability of a sauna to guests. A total of 66 websites (18.13%) mentioned the availability of a fitness centre for guests.

Other amenities such as dining facilities, whether a meal is prepared and served to guests, the availability of room service, and if the room has a minibar were also investigated. A total of 170 websites (46.70%) mentioned the availability of a dining facility onsite, such as restaurants and cafes as well as an outdoor barbecue area. A total of 242 websites mentioned that the accommodation provider is able to serve food to guests, mainly breakfast served as part of the accommodation package or upon request. All of the breakfast options examined on the websites were a choice of continental breakfast or a cooked breakfast. A total of 151 websites (41.48%) mentioned the offering of room service. A total of 68 websites (18.68%) mentioned the availability of a minibar in the guests' rooms.

Finally, the availability of entertainment to guests was also examined on the websites. A total of 265 websites (72.80%) mentioned the entertainment available for guests, which ranged from Sky TV (Digital subscription television) and Freeview (free to air television channels), to a selection of DVD movies for guests to choose from and pay per view movies.

4.2.9 General attributes and accommodation type

Chi-square tests revealed several significant associations between some of the general amenities and facilities and the type of type of accommodation. For example, significant associations were found between accommodation types and availability of pool ($\chi^2=20.51$, $p=0.000$), gym ($\chi^2=110.53$, $p=0.000$), and sauna ($\chi^2=32.12$, $p=0.005$). A higher percentage of motels (54.2%) offered pool facilities in comparison to hotels (32.2%) and B&Bs (13.6%) as shown in Table 4.5 below. A higher percentage of hotels (45.5%) offered sauna facilities in comparison to motels (39.4%) and B&Bs (15.2%). The provision of entertainment facilities was more prominent with motels (57%) than hotels (24.2%) and B&Bs (18.9%), and this association was significant ($\chi^2=45.89$, $p=0.000$).

Table 4.5 Type of Establishment and Availability of Pool

Type of Establishment/ Availability of pool	Not Mentioned	Yes
B&B	87 (35.4%)	16 (13.6%)
Motel	112 (45.5%)	64 (54.2%)
Hotel	47 (19.1%)	38 (32.2%)
Total	246 (67.6%)	118 (32.4%)

4.2.10 General attributes and location

The location of the accommodation provider played a part in the availability of certain attributes. For example, the availability of a spa was associated with establishment location ($\chi^2=22.75$, $p=0.000$), where Rotorua accommodation providers had less of this attribute (42.3%) than Auckland (57.7%), as shown in table 4.6. Similarly Auckland accommodation providers had a higher percentage of availability of food on premises (74%) compared to Rotorua (26%) as shown in table 4.7. This association was statistically significant ($\chi^2=7.60$, $p=0.006$).

Table 4.6 Location of Establishment and Availability of a Spa

Location of Establishment/ Availability of a Spa	Not Mentioned	Yes
Auckland	147 (80.8%)	105 (57.7%)
Rotorua	35 (19.2%)	77 (42.3%)
Total	182 (50%)	182 (50%)

Table 4.7 Location of Establishment and Food on Premises

Location of Establishment/ Food on Premises	Not Mentioned	Yes
Auckland	73 (59.8%)	179 (74%)
Rotorua	49 (40.2%)	63 (26%)
Total	122 (33.5%)	242 (66.5%)

4.2.11 General attributes and Qualmark/TripAdvisor ratings

Several significant associations were found between Qualmark ratings and the availability of some amenities such as pool ($\chi^2=23.37$, $p=0.000$), on-site dining facilities ($\chi^2=28.69$, $p=0.000$), and entertainment ($\chi^2=17.53$, $p=0.004$). For example, 4-star plus (15.3%) and five star (9.3%) accommodation had higher percentages for availability of pool than 3star plus accommodation (7.6%). A similar observation was evident for on-site dining facilities and entertainment. Based on the Qualmark environment rating, Silver rated accommodation (11.9%) had a higher percentage for offering pool facilities in comparison to Bronze rating (5.1%) and this association was statistically significant ($\chi^2=12.46$, $p=0.006$).

4.3 Results of the Secret Shopper

A total of 326 accommodation providers were analysed in the secret shopper stage. Any accommodation provider that was closed permanently or for the season were excluded from the analysis resulting in 86 accommodation providers being omitted.

As shown in table 4.8, the types of establishments used in the secret shopper stage were 68 B&Bs (20.9%), 175 Motels (53.7%), and 83 Hotels (25.5%).

There were 226 accommodation providers located in Auckland (69.3%) and 100 accommodation providers located in Rotorua (30.7%) as shown in table 4.8.

Table 4.8 Secret shopper type of establishments and location

	Frequency	Percentage
<i>Type of Establishment</i>		
B&B	68	20.9%
Motel	175	53.7%
Hotel	83	25.5%
<i>Location</i>		
Auckland	226	69.3%
Rotorua	100	30.7%

Dietary attributes such as vegetarian options, continental breakfast, halal options, kosher options, and others such as gluten free and dairy-free were also examined in the secret shopper stage and were evaluated using three categories: yes, no and unsure.

4.3.1 Halal Attributes

The provision of halal food was explored in the secret shopper stage in addition to the provision of a Qibla (prayer direction) marker, a daily prayer timetable, and a designated area for guests to perform prayer.

As exhibited in table 4.9, 46 respondents mentioned that they are able to provide guests with halal food (14.1% of respondents).

Table 4.9 Secret Shopper Frequencies and Percentages

	No Freq.	No %	Unsure Freq.	Unsure %	Yes Freq.	Yes %
<i>Halal Attributes</i>						
Offer Halal food	262	80.4	18	5.5	46	14.1
Qibla marker	199	61	21	6.4	106	32.5
Prayer times	239	73.3	16	4.9	71	21.8
Prayer Facilities	321	98.5	2	0.6	3	0.9

Other Meal Options

Vegetarian	202	62	2	0.6	122	37.4
Continental Breakfast	92	28.2	0	0	234	71.8
Other	227	69.6	8	2.5	91	27.9
Kosher	276	84.7	26	8	24	7.4

As displayed in table 4.10 below, 14 B&B establishments (30.40%), six motels (13%), and 26 hotels (56.5%) mentioned that they serve halal food to guests. A chi square test was used to assess whether a significant association existed between the provision of halal food and the type of establishment, location, Qualmark rating, and Qualmark enviro rating. The chi square test results ($\chi^2=53.89$, $p<0.05$) revealed a significant association between the provision of halal food and type of accommodation. Halal food is most likely available in B&Bs (30.40%) and hotels (56.5%) in comparison to motels (13%).

Table 4.10 Cross tabulation halal vs. type of accommodation

Type of Establishment/ Availability of halal food	No	Unsure	Yes
B&B	47 (17.9%)	7 (38.9%)	14 (30.4%)
Motel	166 (63.4%)	3 (16.7%)	6 (13%)
Hotel	49 (18.7%)	8 (44.4%)	26 (56.5%)
Total	262 (80.4%)	18 (5.5%)	46 (14.1%)

The second halal attribute studied was the provision of a Qibla marker. As shown in table 4.4, 106 respondents (32.5%), indicated their willingness to provide a Muslim guest with a direction marker in their room in order for the guest to preform prayer. Several chi square tests were used to identify significant associations between the provision of a Qibla marker and the type of establishment, location, Qualmark rating, and Qualmark enviro rating. The results were statistically not significant for the provision of a Qibla marker and the establishment's type, location and Qualmark ratings.

As for the availability of prayer times, 71 respondents (21.8%) indicated they would provide a Muslim guest with a timetable of the daily prayer times in order for the guest to know when to perform the five daily prayers (Table 4.9). As shown in table 4.11, 15 B&B establishments (21.1%) would provide a Muslim guest with a prayer timetable, 42 motel (59.2%) mentioned they would provide a prayer timetable, and 14 hotels (19.7%) mentioned that they provide a prayer timetable to guests.

Table 4.11 Cross tabulation Type of Establishment vs. Prayer Times

Type of Establishment/ Prayer time	No	Unsure	Yes
B&B	52 (21.8%)	1 (6.3%)	15 (21.1%)
Motel	129 (54%)	4 (25%)	42 (59.2%)
Hotel	58 (24.3%)	11 (68.8%)	14 (19.7%)
Total	239 (73.3%)	16 (4.9%)	71 (21.8%)

Chi square tests were used to assess whether significant associations existed between the provision of prayer times and the type of establishment, location, Qualmark rating, and Qualmark enviro rating. The results ($\chi^2=17.41$, $p<0.05$) indicated a significant association between the provision of prayer time and type of accommodation. Motels (59.2%) are most likely to provide a Muslim guest with a prayer timetable in comparison to B&Bs (21.1%) and hotels (19.7%).

The results were statistically not significant for an association between the provision of prayer times and location or Qualmark, and Qualmark enviro rating.

The final halal attribute studied was the prayer space. Only three respondents, (0.9% of total respondents), indicated their willingness to dedicate a space on their premises for Muslim guests to perform their prayer (Table 4.9). A chi square test was used to assess whether a significant association existed between the dedication of prayer space and the type of establishment, location, Qualmark rating, and Qualmark enviro rating but yielded insignificant results

To analyse any significant differences between TripAdvisor ratings and the provision of halal attributes, ANOVA was used. ANOVA with Bonferroni post-hoc results, revealed that there was a statistically significant difference in average TripAdvisor rating based on the provision of halal attributes ($F(2,307)=5.90$, $p=0.003$). On average, accommodation providers that said ‘No’ had a lower TripAdvisor rating ($M=3.89$) in comparison to those that either said ‘Yes’ ($M=4.20$) or were ‘Unsure’ ($M=4.36$).

4.3.2 Non-Halal Attributes

There was a significant association between type of establishment and the provision of continental breakfast ($\chi^2=33.26$, $p=0.000$). A higher percentage of motels (44%) would serve continental breakfast in comparison to B&Bs (26.9%) and hotels (29.1%). Also a significant association existed between provision of kosher foods and establishment type ($\chi^2=45.59$, $p=0.000$). A higher percentage of B&Bs (50%) would serve kosher food in comparison to motels (25%) and hotels (25%). A significant association existed between establishment location and continental breakfast ($\chi^2=7.44$, $p=0.006$), Auckland accommodation providers (65%) were more likely to serve this type of breakfast than providers in Rotorua (35%).

4.3.3 Qualmark/TripAdvisor Ratings and Accommodation Attributes

Qualmark ratings and environmental ratings did not have any significant associations with the variables mentioned in table 4.9. However, an independent sample t-tests revealed a significant difference between TripAdvisor rating and location of hotels ($t=-4.69$, $p=0.000$), where Auckland accommodation providers ($M=3.84$) had a lower Qualmark rating than Rotorua ($M=4.23$). ANOVA with Bonferroni post-hoc comparisons revealed that significant differences existed on TripAdvisor ratings and type of establishment ($F(2,307)=46.08$, $p=0.000$). On average, B&Bs had a higher TripAdvisor ratings

(M=4.76) in comparison to hotels (M=3.85) and motels (M=3.77). Average TripAdvisor ratings were also statistically different on the basis of provision of vegetarian options ($F(2,307)=3.664$, $p=0.027$), where accommodation providers that said ‘no’ (M=3.87) had lower TripAdvisor rating than those that said ‘yes’ (M=4.11). ANOVA also revealed a statistically significant difference in average TripAdvisor ratings on the provision of kosher foods (($F(2,307)=9.503$, $p=0.000$). On average accommodation providers that said ‘No’ had a lower TripAdvisor rating (M=3.88) in comparison to those that said ‘Yes’ (M=4.41) and ‘Unsure’ (M=4.37).

4.4 Analysis of Qualitative Comments from Secret Shopper

Whilst gathering data for the secret shopper stage of research, some respondents’ replies were noted and these were analysed using thematic analysis to identify major similarities and differences in the replies. Based on the thematic analysis, a few themes emerged.

4.4.1 Guests bring their own

This theme is the most commonly mentioned by the accommodation providers. The theme suggests that accommodation providers would prefer if Muslim guests brought their own Qibla marker and prayer times information before arriving in New Zealand. One accommodation owner suggested that the guest should bring all the halal amenities they require and they can set it up in their own room "*Bring their own and put it up themselves in the room*".

Five respondents suggested that they did not provide halal amenities as to not offend their Muslim guests by providing inaccurate prayer time information or placing a Qibla marker that does not point to Mecca. They were of the opinion that the guest should provide their own prayer timetable and the Qibla marker as they are more knowledgeable about their own religion. This is based on their past experience, given that they mentioned the example of previous Jewish guests who brought their own amenities (cutlery and plates) when lodging at their establishment and that Muslim guests can do the same and bring their own items.

4.4.2 Online Request for halal attributes

Another common theme was that Muslim guests with special requests (food, Qibla marker, and prayer timetable) should make a note of their requests when booking online. Seven respondents suggested that the guests should mention their special request in detail in the notes section when booking online. Two respondents also suggested that the guests should contact the accommodation provider before they arrive at the establishment to ensure that their requests can be accommodated.

Sixteen respondents indicated that although they did not serve halal food they could provide it to guests if they requested it. One respondent said that if the guest gave her a recipe she could provide halal food for that guest. However, one respondent did mention that they could provide halal food but that the guest will have to be charged extra for the special request. Another respondent operating a bed and

breakfast suggested that he take the Muslim guest to the local supermarket and purchase for them food that they are comfortable consuming.

Fifteen respondents mentioned that they would be happy to cater to Muslim guests' needs if they were provided with the information. Respondents mentioned that if the guest would tell them where the location of Mecca was in comparison to Auckland or Rotorua they would point out the Qibla using a compass or the compass on their iPhones. Respondents also mentioned that if the guest can inform the owner where to acquire a prayer timetable, the owner would be more than happy to get a prayer timetable and place it in the room of the guest.

4.4.3 Lack of knowledge of Mecca

Another theme is the lack of knowledge of what Mecca is and where it is. Eleven respondents did not know what the city of Mecca was when contacted. When it was explained to the owners what Mecca is, they said that they could not provide a direction marker. One owner mentioned this: "I wouldn't have a clue where Mecca is" and thus he would not be able to provide a Qibla marker. Two respondents mistook the city of Mecca for Macca's! (A slang term used in New Zealand and Australia to refer to the fast food chain McDonald's).

4.4.4 Familiarity with halal attributes

Nine respondents expressed their knowledge of the needs of Muslim guests by catering to previous Muslim guests that stayed in their establishment. For example, one owner said that they have had a group of Muslim guests stay at their establishment and that they had dedicated a room for their guests to pray in. Another owner said that he was willing to figure out the Qibla and would scratch an arrow in the guest room's floor so any Muslim guests he hosts in the future know which way the Qibla is. A motel owner mentioned that they have had a request for a Qibla marker and prayer timetable when a group of Indonesian guests stayed at the motel, and that those guests used to pray in the garden. Two motel owners mentioned that they lived in close proximity to a mosque so the guests can walk to the mosque to pray.

Three owners who were willing to accommodate to Muslim guests' needs mentioned that they have lived in a predominantly Muslim country, and are familiar with Muslim customs. For example, the owners of a bed and breakfast in Auckland mentioned that they have lived in Indonesia for five years, and are familiar with the customs of Muslims. They also mentioned that they are fluent in Bahasa Indonesia. Another Bed and Breakfast owner mentioned that they had lived in Saudi Arabia for 10 years, thus he knew what a Qibla marker and a prayer timetable were. He said that he'd get in touch with a local mosque to get the information for the guest.

Two accommodation providers mentioned that have Muslim employed. The Muslim employees might be able to help the guest with any questions they might have in regards to the food, the direction of Mecca, and the times of prayer.

However, three accommodation providers mentioned that they would not cater to Muslim guests. A respondent for a hotel in Rotorua said that she would “absolutely” not provide a Qibla marker and prayer timetable, suggesting that the guest should provide that themselves. Another respondent for a different accommodation provider mentioned that it is: *“irrelevant if she (guest) can have a Qibla marker if we don't serve her the food she needs”*, suggesting that since halal food is not on offer, it should not matter if they provide all the other halal amenities, and the guest should seek other accommodation providers that cater to Muslim guest’s needs.

4.5 Tertiary culinary courses

In the final stage of this research 15 tertiary institutions from around New Zealand were contacted (14 polytechnics and one university) by phone (Table 4.12). Five tertiary institutions mentioned that halal food preparation was not part of their culinary arts curriculum, one of which said that halal food preparation is a specialist topic and needs to be learned from a professional which the institution did not have. Three institutions mentioned that halal and kosher food preparations are discussed briefly as part of food safety, one institution commented that they taught French style cooking techniques which also included which foods that are considered as halal. One tertiary institution said that halal and kosher food preparation might be part of food safety and cross contamination part of the curriculum. One tertiary institution mentioned that halal food preparation is taught as part of the curriculum. Two tertiary institutions mentioned that they did not have halal and kosher food preparation as part of the curriculum but gluten free and dairy free is part of their curriculum. Three tertiary institutions did not offer cooking courses.

Table 4.12 New Zealand tertiary institutions, the courses they offer, and halal in curriculum

Name of Tertiary Institution	Courses on Offer	Comments
Open Polytechnic	No cooking courses	No cooking courses
Bay of Plenty Polytechnic	Food hygiene for food handlers, New Zealand certificate cookery (level 4), New Zealand certificate cookery (Level 3), New Zealand certificate baking (level 4), New Zealand diploma in cookery	No halal part in the curriculum. They do have ethnic cuisine (global and local) part of curriculum
Otago Polytechnic	Bachelor of culinary arts, New Zealand certificate in cookery, New Zealand diploma in cookery,	No halal but do cover gluten free and dairy free

Nelson Marlborough Institute of Technology	Culinary arts (level 4), Culinary arts (level 5)	They said it was discussed briefly as part of food safety and cross contamination
Aoraki Polytechnic	New Zealand diploma in cookery (level 5), New Zealand diploma in cookery (level 5) patisserie strand, New Zealand diploma in cookery (level 5) cookery strand, New Zealand certificate in cookery (level 4)	No halal courses offered
Wintec	Culinary arts year 1 (New Zealand certificate cookery (level 4)), culinary arts year 2 (New Zealand certificate cookery (level 5)), food safety for food operators, NZQA food safety	Discussed briefly
Weltec	New Zealand diploma in cookery (advanced) with strands in cookery and patisserie (level 5), New Zealand certificate in cookery (Level 4), New Zealand certificate in cookery (Level 3), New Zealand certificate in hospitality (level 2), certificate of achievement in food safety (level 2)	Halal discussed briefly/what constitutes as halal, Taught French style cooking
Whitireia	New Zealand certificate in cookery (Level 4), New Zealand diploma in cookery (advanced) (level 5)	Halal part of curriculum
Unitec	No cooking courses	No cooking courses
Christchurch Polytechnic Institute of Technology	New Zealand diploma in cookery (level5), New Zealand diploma in cookery (level5) patisserie strand, New Zealand diploma in cookery (level5) cookery strand, New Zealand certificate in cookery (level 4)	Halal not part of curriculum
Eastern Institute of Technology	New Zealand certificate in cookery level 3, New Zealand certificate in cookery level 4, New Zealand diploma in cookery (advanced) level 5	No halal, said it was a specialist thing
Ucol	International diploma in cookery (level 5), New Zealand diploma in cookery (Advanced) (level 5), New Zealand certificate in cookery (level 4), New Zealand certificate in baking (level 3),	No halal, said they do discuss dairy free food preparation

	New Zealand certificate in cookery (level 3)	
Te Wananga O Aotearoa	No cooking courses offered	No cooking courses
Manukau Institute of Technology	New Zealand certificate in cookery (level 3), New Zealand certificate in cookery (level 4), New Zealand diploma in cookery (Advanced) (level 5) cookery strand, New Zealand certificate in baking (level 3), New Zealand certificate in baking (Generalist) (level 4), New Zealand diploma in baking (level 5).	Said they might have halal
AUT	Professional culinary arts, commercial culinary practice, culinary values, contemporary cuisine in Aotearoa, food and senses, gastronomy, sociology of food, food industry legislation	Halal not part of curriculum

4.6 Summary and Conclusion

The results yielded from this study shed a light on the halal-friendliness of New Zealand's accommodation providers. The content analysis portion showed that there were two halal attributed mentioned by accommodation providers on their websites, whilst the majority of halal attributes were not mentioned on the websites. Other attributes were mentioned more on the websites such as the availability of a pool onsite and having multilingual staff. The secret shopper results, that were used to cross-check the results of the content analysis, revealed that more accommodation providers were willing to provide halal attributes than the results of the content analysis stage. Quotes gathered during the secret shopper stage revealed some valuable information, such as some accommodation providers' lack of knowledge of halal was and some accommodation providers mentioned that they would not provide Muslim guests with services they might need.

Finally, an examination of the culinary curriculum taught by New Zealand's tertiary institutions revealed that only one tertiary institution included halal food preparation as part of their curriculum. Most tertiary institutions either covered halal food briefly or did not cover halal food preparation at all.

Chapter 5: Discussion

5.1 Introduction

The concept of halal tourism is attracting attention and gaining momentum in the international hospitality sector (Henderson, 2010; Stephenson, 2014). The recent increase in international Muslim travellers, most of whom choose to adhere closely to Islamic teachings and need to practice their religion whilst travelling (Carboni et al., 2014; Henderson, 2010), has been recognised as a growing market with substantial potential (Souiden and Rani, 2015; Mohsin et al., 2015). Both predominantly Muslim and Non-Muslim countries have embraced the idea of catering to this growing tourist market by providing goods and services that are designed to attract the halal tourist. Services range from providing more halal food options in menus, to providing halal friendly accommodation (Henderson, 2010; Weidenfeld and Ron, 2008). There are also efforts being made in New Zealand to engage in this rising phenomenon. Tourism New Zealand co-produced a halal food guide to New Zealand (Tourism New Zealand, 2012b), and a hotel in New Zealand's capital, Wellington, received halal certifications from the Muslim ratings company CrescentRating (100% Pure New Zealand, n.d.a). However, given the limited research that has been undertaken on halal hospitality and accommodation in New Zealand, there is a need to investigate the halal-friendliness of New Zealand's accommodation providers to see the extent to which it is possible to cater to this market. This research also makes a significant contribution to the halal accommodation literature as the vast majority of work on halal tourism and hospitality is based in predominantly Muslim countries or countries with at least a substantial Muslim population and/or workforce.

The purpose of this research was to study the status of New Zealand accommodation providers in terms of halal friendliness and explore which halal attributes are available to the halal tourist. Content analysis of accommodation websites and secret shopper research were carried out, as well as an inquiry into the curriculum of New Zealand tertiary institutions. The websites of accommodation providers were analysed and a secret shopper exercise were employed to explore the provision of the attributes a halal tourist requires whilst lodging in New Zealand.

5.2 The Role of Websites in Communicating Halal Attributes

Using websites as portals to communicate the availability of halal services is regarded as essential in attracting halal tourists (Hashim et al., 2007). Digital media is becoming an important step in the consumer decision making process. Websites and social media are the predominant forms of digital communication used (Phelan et al., 2011). In order for an accommodation provider to attract halal tourists, it has been suggested that it is essential that they must mention on their websites that they offer halal amenities (Hashim et al., 2007). However, the majority of websites analysed in this research did

not mention their ability to cater to halal tourists. Only three websites of the 364 websites analysed mentioned the availability of halal food, all of which were hotels in Auckland. This stands in substantial contrast to accommodation providers in Malaysia (Khan and Khan, 2015; Khan and Khan, 2016; Henderson, 2015), a predominantly Muslim country, and Singapore (Stephenson, 2014). If the results obtained from the content analysis stage were treated in isolation it would suggest that most of the accommodation providers studied were not suitable for halal tourism. However, as noted below, the number of accommodation providers offering halal attributes rose significantly once the secret shopper stage was employed.

Nevertheless, a clear communication strategy by accommodation providers with respect to the provision of halal related information to prospective visitors would be required if the New Zealand hospitality industry wants to tap in the growing halal tourism phenomenon. Hospitality providers must think of content, message, layout and options of languages in which their websites can be viewed by an international audience of Muslim travellers. From the outset, the lack of accomdation websites outlining halal friendly amenities challenges the notion of New Zealand offering a ‘friendly’ atmosphere to Muslim tourists. In this respect, the destination is not actively seeking positioning of its offer among Muslim travellers. As indicated in the findings in Chapter Four only two halal-friendly attributes were mentioned on the websites analysed, which were the availability of halal food on-premises and gender segregated facilities. The availability of halal food is a decisive element for making an accommodation decision for Muslim travellers (Lada et al., 2009; Prayag and Hosany, 2014). However, only three hotels mentioned that they have halal menu items.

5.3 Preparedness of the Accommodation Industry for Halal Tourism

As suggested in previous studies (Battour et al., 2011; Stephenson, 2014) some accommodation requirements are critical to attract halal tourists. For example, the lack of gender segregated facilities is frowned upon according to some interpretations of Islamic teachings (Eid, 2015; Battour et al., 2011). A handful of websites mentioned that a gender segregated facility was available on-site. Only one accommodation provider had both halal food items and gender segregated facilities. The majority of websites that mentioned the availability of health and fitness facilities did not have gender segregated facilities. The availability of health and fitness facilities have been proven to be an important accommodation attribute when choosing an accommodation provider (Jones and Chen, 2011), and many Muslim tourists have expressed their desire to use an accommodation provider’s health and fitness facilities (Battour et al., 2011). However, the lack of gender segregated facilities prevents many Muslim tourists, especially females, to enjoy those facilities. The lack of such facilities would hinder accommodation providers’ capacity to target Muslim travellers and hence raises pertinent questions with respect to New Zealand’s hospitality industry preparedness for visitors from predominantly Muslim countries.

Nevertheless, despite the absence of formal information for halal tourists, a number of attributes that might be helpful to halal tourists were mentioned on the analysed websites. These attributes provide the foundation for building a hospitality industry that is active in attracting halal tourists and cater for not only Muslim travellers but also travellers of other faiths. For example, the availability of an in-room cooking facility would allow a halal tourist to prepare their own meals. This was in line with the research of Yusof and Shutto (2014) and Wan Hassan and Hall (2003), the latter in a New Zealand context, who explained that when there is a lack of halal food available at a destination, many Muslims choose to prepare their own meals. A few of the websites analysed (10.99%) mentioned the availability of vegetarian meals, which is a possible option for Muslim tourists to choose from when halal is lacking at a dining facility. This was also recognised by Yusof and Shutto (2014).

5.4. Dealing with Haram Attributes

A number of accommodation attributes that are prohibited under Islamic law were mentioned on the websites of accommodation providers in both Auckland and Rotorua. Muslims are instructed to avoid the consumption of alcohol and gambling in the *Quran* and Islamic teachings, and many halal tourists may choose to avoid places that do engage in such activities (Battour et al., 2011). Many websites also mentioned the serving of alcohol on-premises. Some websites indicated their close proximity to a gambling facility (mainly racecourses and casinos), whilst others specified that they have gambling facilities onsite. Both the availability of alcohol and gambling facilities are contrary to the recommendations of Battour et al. (2011); Stephenson (2014); and Samori and Sabtu (2014) to attract Muslim guests.

For these accommodation providers, their websites could potentially be in explicit in suggesting that their offer is not suitable for Muslim travellers as they are located close to gambling facilities. Provision of such information would not only inform prospective Muslim travellers that the facilities are unsuitable for them but also improve such tourists confidence in choosing New Zealand as a holiday base. Transparency in information provision with respect to serving alcohol on site would also shift the onus to prospective travellers to make the right decision when choosing accommodation options.

5.5 The Gap between Online information and Actual Service Delivery

It is clear from the results of the content analysis and secret shopper that a significant difference in information on halal amenities and services from the accommodation providers exist. This also reinforced the value of cross-checking web site information. Once contacted directly, 14.1% of the accommodation providers explained they do in fact serve halal food on their premises, while others indicated halal food is available upon request, this was stated in Battour et al. (2011) and Battour et al. (2014) who indicated that if there is a lack of an attribute, a Muslim guest can request it.

The availability of halal friendly attributes on request emerged as a recurring theme during the secret shopper stage. Accommodation providers that were willing to offer halal friendly amenities stated that

they would provide the required amenities if the guests requested them whilst booking. This would suggest that when a Muslim guest is looking for accommodation, they need to contact the accommodation provider directly in order to ensure that the accommodation provider is able to cater to their special needs. Although, of course, this clearly raises issues about how might potential Islamic tourists know this when at the initial stage of destination or even accommodation selection. Two accommodation providers also indicated that they would charge the guest more for the provision of halal attributes. The charging of extra costs for such services is similar to the findings of Weidenfeld (2006).

The lack of knowledge as to what constitutes halal and halal friendly amenities is potentially a major hurdle to attracting halal tourists to New Zealand. Some accommodation providers only associated halal with food, and several accommodation providers did not know what halal food was. Food was not the only attribute accommodation providers had a lack of knowledge of. Many providers did not know what a Qibla marker, prayer timetable, or the city of Mecca was. On the other hand, some accommodation providers mentioned their familiarity with the requirements of halal (see Bon and Hussain, 2010; Hashim et al., 2007, for comparison) or that they have a Muslim person on their staff who would be able to assist. The availability of Muslim staff to assist halal tourists is also mentioned in Saad et al. (2014).

The findings of this study suggest that many accommodation providers in New Zealand are able to provide some halal-friendly services, but this fact is not conveyed on the accommodation providers' websites. Reviewing websites is one of the first steps consumers take in the accommodation decision making process (Hashim et al., 2007), and the absence of available information regarding halal attributes would require Muslim guests to take further steps in order to ensure their needs can be catered to by an accommodation provider (Marranci, 2012). In order for a Muslim tourist to find the amenities they are look for, that tourist would need to directly contact the accommodation provider in order to find out if the accommodation provider can cater to their needs.

In order to accommodate Muslim guests, accommodation providers need to familiarise themselves more with the halal procedures and practices (Hashim et al., 2007) so as to deliver a quality service that is halal compliant and be able to address any concerns Muslim guests might have with a service correctly. The need for such awareness is also noted in Wong (2004) and Skogland and Siguaw (2004). However, there appears to be no clear mechanism by which accommodation providers can do this. Obviously, they may choose to look online for information although there is little New Zealand specific advice. In terms of halal information for providers there is only very limited information on Tourism New Zealand, Regional Tourist Organisation or Qualmark websites. Indeed, the results of the statistical analysis suggested a positive relationship between some accommodation attributes that would be regarded as haram, such as the availability of alcohol, and quality ratings and assessments. This raises some interesting issues therefore with respect to the unintended cultural biases of Qualmark ratings and the

extent to which they would be useful for halal tourists. Such situations may therefore be one of the drivers for the development of special apps for halal tourists, as noted in Chapter One.

Despite interest in attracting more Islamic tourists to New Zealand (see Chapter One) an examination of hospitality education in New Zealand suggests that students training in the culinary arts at most of New Zealand's tertiary hospitality providers are not being given significant amounts of training in the techniques of halal food preparation. Most institutions are either choosing to cover halal food preparation only briefly or not at all. This lack of halal food preparation skills might be therefore be contributing to the shortage of halal food at accommodation providers as well as broader failings in management awareness.

5.6 Qualmark Ratings and Hotel Attributes

An accommodation provider's rating can be used to provide potential guests information regarding the quality level of the service delivered by the accommodation provider (Gössling et al., 2016). The rating is meant to be based on the attributes and services provided. A large number of accommodation providers examined did not have a Qualmark rating, although this is in line with Lockyer and Roberts (2009) findings with respect to quality assessments in New Zealand. However, the accommodation provider's rating did appear to be influenced by the availability of certain attributes such as the availability of an onsite bar or serving of alcohol which were available more in establishments that were highly rated. This result could influence the expectations of some potential lodgers (Rhee and Yang, 2015). However, the accommodation provider's rating did not have a significant influence on the availability of halal attributes, however the availability of haram attributes such as onsite-bar and serving of alcohol may deter Muslim tourists from staying in highly rated establishments that have more of these attributes.

5.7 TripAdvisor Ratings and Hotel Attributes

Online reviews created by customers are a popular means of service assessment at the moment. Customers are turning increasingly to online review websites in order to gather information regarding travel destinations and accommodation providers as they are created by people who are meant to have experienced the facilities themselves and are seen as more reliable (Williams et al., 2010; Barreda and Bilgihan, 2013; Gössling et al., 2016). The findings of this study showed that the availability of most accommodation attributes were not influenced by the establishment's TripAdvisor rating. However, the secret shopper stage revealed that an accommodation provider's average TripAdvisor rating was higher amongst establishments that do offer halal attributes. This may potentially be helpful to Muslim travellers who are planning a future trip to New Zealand, as per the findings of Barreda and Bilgihan (2013), but the use of TripAdvisor by Muslim tourists for service quality assessment versus applications that have been specifically designed for the Islamic traveller is an area of research that is yet to be developed.

5.8 Conclusion

This study was undertaken to explore which halal accommodation attributes were available for Muslim tourists in New Zealand. Most of the halal attributes studied in the content analysis stage were not mentioned on the accommodation providers' websites, whilst many other accommodation attribute were mentioned more by the analyses websites. However, once the accommodation providers were contacted by phone, many revealed that they do offer or were willing to offer some halal attributes. A Muslim traveller in New Zealand is required to contact the accommodation provider directly in order to ensure that the accommodation provider is able to supply the attributes needed. An inquiry into the availability of halal food preparation courses was also conducted, which revealed that halal food preparation is not offered by many tertiary institutions in New Zealand, whilst other institutions' curricula discuss halal food preparation briefly and do not delve in-depth into the complexities of the halal food requirements.

Chapter 6: Conclusion

The growth in the popularity of halal tourism has influenced the introduction of halal-compliant goods and services by many service providers around the world to attract the Muslim traveller to their establishments. Accommodation providers are amongst the service providers aiming to cash in on the halal tourist segment. This is also the case of New Zealand, which has been making efforts to attract Muslim travellers to its shores. Accordingly, this study explored the halal friendliness of the New Zealand's accommodation providers. The results shed some light on the halal attributes available for Muslim tourists in New Zealand and therefore offer several managerial implications for accommodation providers and destination marketers. The chapter starts with a summary of the contributions of the study, followed by the managerial implications. The chapter concludes with some limitations of this study as well as suggestions for future research in the field of halal tourism.

6.1 Contribution to knowledge

This study offers a better understanding of halal-friendly amenities available in different types of accommodation in New Zealand, hence fulfilling an important gap regarding halal-friendly accommodation in New Zealand and other non-Muslim countries. By exploring the availability of suitable halal amenities and services as well as more general amenities on offer to halal-conscious tourists arriving in New Zealand using two different methods (content analysis and secret shopper), the study highlights the gap between what is stated on accommodation provider websites and the information they can provide in personal communication. As such the results provide insights into how New Zealand accommodation providers may promote themselves via their websites to potential Islamic guests. The current lack of communication on websites about halal attributes offered in New Zealand, accentuate the need for educating and coordinating the efforts undertaken by New Zealand's accommodation providers to make the country a more halal-friendly destination and the ability to promote the country as a place that welcomes Muslim tourists. Hence, another contribution of the study is that it highlights the need for education of accommodation providers on halal tourism.

6.2 Managerial Implications

Based on the findings of this study a number of implications for management and marketing are identified with consequent recommendations.

6.2.1 Marketing and Promotion of New Zealand as a Halal Friendly Destination

Foremost, if the country's tourism industry wishes to pursue the Islamic tourism market then New Zealand needs to promote itself to Muslims around the world as a halal-friendly destination. The findings from the content analysis show that very little information is offered to tourists on

accommodation websites. This potentially impacts Muslim travellers' decision making processes negatively. To improve destination selection, Tourism New Zealand can follow the example of Tourism Australia (HalalTrip, 2015) and co-produce with HalalTrip a halal guide to the country to showcase the natural beauty, its attractions, and the halal-friendly amenities including halal food outlets available to Muslim travellers.

The lack of halal amenities and facilities mentioned on websites also suggest that there should be a more holistic approach in marketing, promotion and communication by accommodation providers targeting the Muslim traveller segment. Accordingly, another recommendation to Motel Association of New Zealand for example, is a coordinated effort in the promotion of halal attributes in existing travel guides (e.g. AA NZ Travel Guide) and websites such as New Zealand Tourism Guide. Also, individual hotels, motels and B&Bs should state that they have halal amenities in the public domain rather than potential guests having to communicate with the provider to find availability of such amenities. The visibility of halal services on accommodation providers' websites would help Muslim tourists make an accommodation decision when planning their tour and may also potentially influence the initial holiday decision-making process. This may be especially so for family groups if there are concerns over children's access or exposure to non-desirable activities (Carr, 2011; Ram et al., 2014; Ram & Hall, 2015).

6.2.2 Accommodation Providers' Marketing of Amenities for Muslim Travellers

When different types of accommodation providers market themselves to Muslim guests, each accommodation provider type needs to emphasize the halal attributes that they are able to provide. B&Bs can promote the ability to provide halal food and Qibla markers upon request. Motels can emphasize that their rooms have kitchens which would enable a Muslim traveller to prepare their own halal meals. Hotels can promote the halal menu items they offer and their ability to provide in-room halal attributes such as Qibla markers and prayer times as well as having segregated facilities if they are available. In this way, accommodation providers can package their products to satisfy the requirements of Muslim travellers in general. However, targeting this segment of travellers will require accommodation providers to consider religious needs holistically, taking into account all requirements of 'halal' tourism and developing service offers that include all of the above mentioned attributes. Indeed, an improvement in the capacity of accommodation providers to meet the specific requirements of different religions is something that would benefit not only Muslim travellers but travellers of other faith as well such as Jewish.

6.2.3 Exposure to Halal Practices in the Accommodation Sector and Education

Accommodation providers and tourism professionals in New Zealand are recommended to actively participate in the halal forums being held globally. Accommodation providers can get an insight into the latest trends and methods to attract the patronage of Muslims and they can take an active role in

shaping the future of halal tourism. Participation in the halal forums can also help promote New Zealand on the global halal scene as a Muslim-friendly place and a must visit destination. It is clear from the findings that limited knowledge exists among accommodation providers on halal practices in the accommodation sector worldwide. Therefore, an important implication of this study is the need for training and education on such practices. Short-courses delivered by Tourism New Zealand for example, can be a starting point to educate accommodation providers on ‘halal tourism’ and the needs of ‘halal tourists’. Accommodation providers need also to train their staff in cultural and religious norms and practices so the staff are well informed and able to provide assistance when needed.

Also, New Zealand’s tertiary institutions offering culinary arts courses in their curriculum are recommended to give halal food preparation techniques a bigger role in their courses or offer courses exclusively for training in halal or religious guided food preparation techniques. The need to have cooking staff that are well versed in halal food preparation is essential in order to offer halal food, which in turn would help attract Muslim tourists to choose the accommodation provider employing staff well versed in halal practices.

6.2.4 Positioning of New Zealand as a Halal Friendly Destination

Given that accommodation providers are not engaged in targeting the Muslim traveller explicitly from what they communicate on their websites and information gathered from the secret shopper, this is a missed opportunity for New Zealand to position the destination in the growing market of Muslim Travellers. Unlike Australia that has taken an active step in producing a halal guide, tourism authorities in New Zealand are lagging behind in formulating clear segmentation, targeting and positioning strategies in markets such as Malaysia and Indonesia to attract Muslim travellers. As competition to attract the increasingly discerning Chinese travellers intensifies, it may be worthwhile for New Zealand to put some resources into attracting Muslim travellers. Differentiating the destination from other Western destinations would also be required to attract Muslim travellers. Emphasizing availability of kitchen facilities, Qibla markers in rooms, halal food amongst others would be a starting point to create awareness about the destination being halal friendly.

6.2.5 Product and Service Development

Related to the previous point, the fact that no explicit strategies to target the Muslim segment of travellers exist, it would be worthwhile for accommodation providers to design products and services aimed at this group. For example, accommodation providers can have specially dedicated rooms on their premises that include prayer mat, prayer times, copy of Quran, Qibla marker and certified halal items. They can also design pool, gym and spa facilities to be segregated on the basis of gender.

6.3 Limitations

Careful consideration was taken in the creation and implementation of this study. However, a few limitations did arise when conducting the research. The first limitation was timing. The data gathering was conducted in a time period when a number of accommodation provider owners, primarily bed & breakfasts and similar providers, chose to close their premises for the season. This limitation made those closed properties ineligible to be studied.

The second limitation was language. Many accommodation providers use different terms to describe the same attribute, for example referring to a spa pool as hot tub or Jacuzzi. This might leave some attributes unaccounted for. Language was also a problem when contacting some accommodation providers to whom English is a second language. This might have hindered the accuracy of the information gathered from them.

6.4 Suggestions for future research

There are a number of suggestions for future research into the topic of halal tourism. This research was only a masters level exploratory study of halal and accommodation providers in New Zealand that utilised content analysis and secret shopping to gain information. Therefore, an obvious first recommendation is to use other research means such as the conduct of a survey, the hosting of focus groups, and/or interviews to gain a further understanding of New Zealand accommodation providers and gauge their knowledge and willingness to cater for halal tourists. Application of these research methods will help identify if the accommodation providers are willing to cater to the growing market of halal tourists and the amount of knowledge those accommodation providers have regarding halal amenities.

A second suggestion is conducting a comparative research between countries and/or regions in order to explore the halal-friendliness of accommodation providers internationally and compare results with New Zealand's accommodation providers in order to determine New Zealand's position in terms of halal-friendliness compared to other nations.

A further suggestion is to undertake more observational and ethnographic type research, that may also include interview based research. Interviewing accommodation providers will allow an in-depth look at opportunities and barriers into providing halal-friendly attributes to Muslim guests from their perspective. This could be complimented by observation and ethnography that would help gain insights into the interactions between hosts and guests with respect to halal. The information gathered from this sort of research will help develop strategies into incorporating halal amenities into the offering of accommodation services. Finally, it can be noted that there is an overall paucity of research on Muslim travellers in New Zealand which needs to be met in order to better identify their needs and constraints in travelling.

6.5 Conclusion

This study aimed to explore the state of halal-friendly attributes offered by accommodation providers in New Zealand. This topic has never been addressed in the literature, therefore, this study is the first of its kind designed to explore halal tourism in New Zealand.

Accommodation providers that do serve halal items at their establishments have not been promoting this fact on their websites. Such items are essential for Muslim tourists when choosing accommodation and having that information included in the marketing communication would help steer potential guests to that accommodation provider. Yet many establishments expressed their willingness to provide halal items when requested. Therefore, when Muslim tourists decide to stay at an accommodation establishment in New Zealand, they need to let accommodation providers know about their special lodging requirements before making any arrangements to ensure the availability of the items they need. Accommodation providers can also indicate that they are able to provide halal-compliant attributes upon request.

Halal tourism is growing and is recognised internationally. New Zealand accommodation providers need to review their offering and create opportunities to allow for the accommodation of Muslim guests as part of their offering. Staff training and a sound understanding of halal amenities would help give a business get an edge and be able to get a share of the halal tourism benefits.

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Appendix A: Razzaq, S., Hall, C.M. & Prayag, G. 2016, The capacity of New Zealand to accommodate the halal tourism market – or not. *Tourism Management Perspectives*, in press. [Version provided here is the accepted manuscript]

The capacity of New Zealand to accommodate the halal tourism market – or not

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HIGHLIGHTS

- Assesses provision of halal-friendly information on New Zealand lodging websites
- Provides model of value of accommodation attributes for halal tourism
- Less than one per cent of accommodation websites specifically mentioned halal

The capacity of New Zealand to accommodate the halal tourism market – or not

Abstract

Halal tourism and hospitality, also referred to as Islamic or sharia tourism, has implications for both the consumption and production of tourism and hospitality products. A number of potential attributes of halal accommodation are identified and applied to an analysis of accommodation provider websites in Auckland and Rotorua, two major tourist destinations in New Zealand, a country that is increasingly seeking to position itself as an halal friendly destination in Asia and the Middle East. The analysis of 367 accommodation websites found only three sites that specifically mentioned halal and also identified a number of attributes that may deter more conservative halal tourists. The findings raise significant questions with respect to the capacity of the New Zealand accommodation sector to both convey appropriate accommodation information to the Islamic market as well as provide satisfying experiences to those who do stay. Substantial improvements in training, education and communication strategies are recommended.

Key words: halal tourism; halal hospitality; halal lodging; Islamic tourism; Sharia tourism; accommodation sector; hotel web sites; content analysis

The capacity of New Zealand to accommodate the halal tourism market – or not

As the Muslim consumer market expands in many Western countries as a result of migration, international education and tourism so the hospitality and tourism sectors have become increasingly interested in catering to its needs. These are usually described under the rubric of Islamic or halal tourism and/or hospitality (Din, 1989; Henderson, 2002; Battour et al., 2010; Scott & Jafari, 2010; Syed Marzuki et al., 2012a, 2012b, 2013). Tourism research has long been interested in religious tourism in the guise of pilgrimage and religious attractions (Rinschede, 1992; Poria, et al., 2003; Haq & Jackson, 2009). However, given its role in identity and personal behaviour religion clearly has major implications for the consumption and provision of tourism and hospitality products outside of a specified religious activity as part of, for example, the ‘everyday’ consumption of leisure tourism and hospitality as part of the emergence of an Islamic middle class (Delener, 1994; Wan Hassan & Hall, 2003; Wong, 2007; Battour et al., 2011; 2012; Prayag & Hosany, 2014).

This paper provides an examination of the extent to which the New Zealand accommodation sector promotes attributes that fulfils the notion of halal tourism. Using a template that has been developed from relevant literature an analysis is conducted of accommodation websites in Auckland and Rotorua, two of New Zealand’s leading urban tourism destinations. Importantly, the paper emphasises that halal tourism and hospitality is not just about the provision of halal food but a range of product attributes that would be relevant to Muslim customers and which New Zealand accommodation operators fails to promote and provide.

Halal

The idea of halal is often thought to relate only to food and what is allowed to be consumed by Muslims (Regenstein, 2003; Riaz & Chaudry, 2004; Bonne & Verbeke, 2008). However, although important, the notion of halal is much wider than just food (Chaudry, 1992; Wilson & Liu, 2011). The source of what constitutes halal and *haram* is derived from the *Quran*, The prophet’s *Hadith* (the Prophet Mohammed’s teachings), and what Islamic jurists have deemed as *haram* (forbidden), such as animals with long pointed tusks or fangs, birds of prey, and animals that are strictly forbidden from being killed in Islam such as the hoopoe (a type of bird that is also forbidden in the Old Testament and Torah) and the honeybee (Bon & Hussain, 2010).

The main source of a Muslim’s dietary requirements come from the *Quran* which states what foods are considered permissible and what is strictly forbidden, such as the *Ayat* (verses) mentioned in *Surat Al Maaidah* (5:4) that outlines that apart from the foods that were forbidden in other verses all foods are considered halal, as well as the catch from birds of prey trained for hunting. The *Quran* further mentions that the foods of *Ahlul-Kitab* (translated as People of the scripture, e.g. Jews and Christians) are also considered as halal as well as the food of Muslims are considered as permissible for them (*Surat Al Maaidah*, 5:5). The *Quran* also sets out what is strictly forbidden for Muslims to consume: “Only carrion, blood, flesh of swine and that which is consecrated for anything other than God is prohibited for you. Even, in these things, whoever is driven by necessity, intending neither sin nor transgression, there shall be no sin upon him. Indeed God is extremely Forgiving, Eternal in mercy” (*Surat Al-Baqarah*, 2:173).

The issue of halal and haram food has long been debated by Muslims scholars and jurists. A number of lists have been created based on the Quran and the teachings of the prophet Muhammed [SAW] of what is permissible and what is forbidden (Regenstein et al., 2003). However, while there are clearly a number of common elements some differences in interpretation exist between different Islamic traditions and the socio-cultural practices that affect consumption.

However, as noted above, the concept of halal and haram is not reserved only for food. Some verses from the *Quran* also mention other things that are considered haram. The *Quran* mentions that gambling and the consumption of alcohol are also considered haram, as mentioned in *Surat Al-Maaidah* (5:90) “O ye who believe! Intoxicants (all kinds of alcoholic drinks), gambling, Al-Ansab, and Al-Azlam (arrows for seeking luck or decision) are an abomination of Shaitan’s (Satan) handiwork. So avoid (strictly all) that (abomination) in order that you may be Successful”. Thus, a Muslim must be watchful of their consumption in a wider context than just food with respect to fulfilling the teachings of the Prophet [SAW] (Syed Marzuki et al., 2013). This means not only paying attention to what is consumed or produced but where it comes from and the processes and, arguably, intentions behind consumption and production. Halal must therefore be understood within the context of what is in Islam *fard* (compulsory), *mustahabb* (recommended), *makruh* (disliked), and *haram* (forbidden) that, together with halal defines the morality of all human action.

The framing of consumption and production by adherence to Islamic teachings and traditions is therefore critical to understanding and meeting the needs of a market identified by their religious adherence. Within Muslim countries the provision of halal products tends to be taken as a given. However, increased international trade together with the growth of Islamic populations in and visitors to countries that are predominantly non-Muslim has led to the perception of the existence of new market opportunities, including with respect to tourism and hospitality.

Halal Tourism

The phenomenon of the rise in demand for commercial tourism and hospitality services that adhere to the laws of Islam has been described as ‘Halal tourism’, ‘halal hospitality’ , ‘sharia tourism’ or ‘Islamic tourism’ (Henderson, 2010; Carboni et al., 2014). Halal or Islamic tourism is defined here as tourism and hospitality that is co-created by consumer and producer in accordance with the teachings of Islam. Many nations in the Islamic world are capitalizing on the rise in demand for Muslim-friendly tourist services (Pavlova, 2011). Henderson (2010) argues that the concept of Islamic tourism is a recent one, and one that has been gathering pace in some countries in south East Asia such as Malaysia and Singapore. Although, in some ways, such a perspective is surprising given the significance attached to travel in Islam both with respect to the duties of a Muslim with respect to pilgrimage as well as the importance that the *Quran* attaches to travel and knowledge of the world. Malaysia has been trying to brand itself as a global halal hub (Bon & Hussain, 2010; Syed Marzuki et al., 2012a, 2012b), and is capitalizing on catering to Muslim tourists’ needs especially the ones from Middle Eastern countries by offering halal tourism products. Similarly, Singapore has also begun to promote itself as a Muslim-friendly country to the Muslim world, both of those countries have seen a significant rise in Muslim tourists arriving at their shores (Henderson, 2010).

New Zealand has been increasingly trying to position itself as a destination for Muslim tourists since the late 1990s. This is a result of several influences. First, New Zealand is a major exporter of halal meat supplies. Second, the country has a small though growing Muslim population which is complimented by a significant international student market from Muslim countries. Finally, Tourism New Zealand, in conjunction with other tourism actors has increasingly been seeking to promote New Zealand in major Muslim markets in the Middle East, India, Indonesia and Malaysia (Sulaiman, 2001; Wan Hassan & Hall, 2003; Tourism New Zealand, 2014). In order to help attract Islamic visitors Tourism New Zealand and Christchurch International Airport supported the production of an halal food guide entitled *New Zealand A Culinary Haven for Muslims* that stated that the country “boasts a present and growing halal industry and offers an array of halal eateries, restaurants and grocers for Muslim travellers” (KasehDia Sdn Bhdi, 2012, p. 3).

However, although there is official interest in promoting New Zealand to Islamic tourists substantial uncertainties remain over the capacity to provide appropriate services to Muslim visitors. For example, at the time of writing the above mentioned halal culinary guide is no longer available from the Tourism New Zealand web site. The next section discusses some of the attributes of accommodation that may prove attractive to Islamic tourists.

Islam and Accommodation Attributes

Battour et al. (2011) found that during the destination decision-making process, a Muslim tourist would often consider Sharia (Islamic law) to guide their choice of travel destination and accommodation. They listed six attributes an accommodation provider should have to appeal to the Muslim traveller (see also Henderson, 2010, on sharia compliment hotels which have similar attributes to those identified by Battour et al., 2011; see also Stephenson, 2014). These include

- Hotels meeting the religious needs of patrons, e.g. the provision of prayer mats in rooms along with an indication of where the *Qibla* (prayer direction) is. It may also be appropriate to remove bibles from rooms occupied by Muslim guests;
- Information about places of worship is provided to guests e.g., the accommodation’s proximity to a mosque or the dedication of a space in the hotel for the congregation of Muslims to perform prayers or Friday prayers;
- Availability of halal food, e.g. the provision of halal meal choices by the accommodation provider in restaurants and in-room dining. Provision of halal food may also be accompanied by appropriate certification;
- The banning of alcohol consumption and gambling, e.g. the removal of alcoholic beverages from the room in which a tourist is staying,
- Removal of any pornographic material and any sexually suggestive programming options from being broadcasted in the room. The proximity of the hotel to the local red light district may also be an issue. Concerns over sexual promiscuity may also include the provision of separate swimming quarters for men and women; and
- An appropriate dress code, e.g. the use of conservative dress by hotel staff.

Cleanliness is another important accommodation provider attribute. Battour et al. (2011) note that the cleanliness of a hotel room and its bathroom are essential for Muslims, as Muslims require clean bathrooms to perform ablutions and prepare for prayer, and a clean room would be suitable for praying and reading the Quran. Another dimension that is also significant is the need to ensure that hotel

supplied toiletries, such as soaps, are also halal. In other countries that cater to an Islamic tourist market, such as Mauritius, this information is often clearly indicated on hotel supplies.

In order to suit the needs of the halal tourist, a number of accommodation design requirements may need to be fulfilled. Ideally, any area dedicated for worship needs to have the *Qibla* clearly marked and prayer mats provided as well as an area where the worshipper can perform ablutions or *widhu* which every Muslim is required to perform before every prayer or handling the *Quran* (Battour et al., 2011; Jafari & Scott, 2014).

Accommodation providers need to also ensure their exercise facilities are segregated according to sex with separate exercise facilities and pools for both sexes, as well as spas (Battour et al., 2011). Some Muslim communities frown down on the free mixing of the sexes and thus prefer the separation of sexes. For example, it is customary in Saudi Arabian culture that the sexes be separated, and Saudi Arabian tourists ensure they are able to have separate quarters for males and females when choosing accommodation whilst traveling (Ladki et al., 2002). If there is a lack of separate areas for both sexes, Saudi Arabian tourists tend to book more than one room when staying at hotels for the purpose of dedicating an area for males and females (Ladki et al., 2002).

Figure 1 outlines various attributes of accommodation provision in New Zealand developed by the authors through a review of accommodation directories and websites combined with attributes identified as being relevant to halal accommodation derived from the literature. These are then organised as to whether they are a positive (attractive to Islamic tourists) or negative attribute (a disincentive to stay at the provider). A number of attributes are also identified as neutral. However, it should be noted that this assumes, for example, that there are controls on entertainment services so that certain channels may be blocked. Information is not usually available on websites to confirm whether the alcoholic contents of mini bars can be removed although this is often the case. Figure 1 also suggests that some accommodation attributes may also affect female Muslim travellers more than others given requirements for appropriate modesty and, in some interpretations of Islam, to segregate sexes altogether.

<INSERT FIGURE 1 ABOUT HERE>

Service encounters

In addition to staff dressing conservatively it is also appropriate for staff to have a degree of knowledge of other cultures and their service needs and cultural norms. Arguably, this should be something that all staff that deal with international visitors should possess (Kong & Jogaratnam, 2007). However, it may be especially valuable when dealing with customers of different religious persuasions and may prove valuable when seeking, for example, to manage different tour groups with different culinary demands. Similarly, Muslims are required to fast during the month of Ramadan, and therefore contact staff must be aware of the fact that Muslim patrons must refrain from food and drink from sunrise to sunset and not make any suggestions for meal options such as what the soup of the day is on the lunch menu.

One little discussed attribute of accommodation services for Muslims is the significance of Islamic finance. Arguably, if strictly applied the financial operations of a sharia-compliant hotels must also adhere to Islamic financial principles. The funds to set up and run a sharia-compliant hotel must be sourced from halal avenues and not from bank loans with interest. Perhaps more importantly for hotels in countries where business finance are not usually run on Islamic financial principles, all transactions must not have any interest added on as it is strictly against Islamic teachings (Stephenson, 2014). Hotel management should also ensure that *Zakat* be paid from the hotel's revenue to help the poor and needy (Stephenson, 2014).

The halal attributes of Auckland and Rotorua accommodation providers

Given the importance of online information in influencing customer decision making with respect to accommodation (Sparks & Browning, 2011; Díaz & Koutra, 2013; Hernández-Méndez et al., 2013; Tian & Wang, 2014; Manganari, et al. 2015), a content analysis of accommodation provider websites in Auckland and Rotorua was conducted in February and March 2015. A database of accommodation providers in the two cities was developed via use of on-line databases, tourism information websites, *Yellow Pages™*, local government websites and guidebooks. In all 289 accommodation providers were identified in Auckland and 123 in Rotorua. Of these 31 providers in Auckland did not have a dedicated website, and six were not working at the time of analysis. For Rototua the figures were seven and one respectively. The final analysis was therefore conducted on the websites of 252 accommodation providers in Auckland and 115 in Rotorua. Rental apartments and properties were not included in the database.

The content analysis of accommodation providers websites is detailed in Table 1. What is remarkable in the analysis is the extent to which the Islamic accommodation attributes noted by authors such as Battour et al. (2011), Henderson (2010) and Stephenson (2014) are not readily available in the two locations. Only three providers in Auckland mention halal on their website and none in Rotorua. Indeed, there are more pet-friendly accommodation providers than hotels and motels that promote their appropriateness to the Islamic market on their web sites. Many other specific religious needs are not recognised. Mention of the availability of alcohol and entertainment options is geared towards a secular market, rather than a Muslim or teetotal market segment. Of course, such information may nevertheless be useful for accommodation selection even if not in the manner intended by providers.

<INSERT TABLE 1 ABOUT HERE>

With only three providers stating on their websites that they supply halal food, the perceived lack of halal food may potentially be compensated by the availability of vegetarian food which may be acceptable to some Muslims or even use of self-catering facilities, assuming that halal supplies can be obtained by visitors. Although in strict terms vegetarian food per se may not be suitable for Muslims unless the kitchen and supply chains are also halal, i.e. they ensure that there is no contamination, it nevertheless may provide one eating option for Muslim travellers (Syed Marzuki et al., 2013). Indeed, a closer examination of the KasehDia Sdn Bhdi (2012) halal food guide for New Zealand suggests that where noted many of the restaurants and cafés served vegetarian food rather than being halal certified.

However, the body of data identified in table 1 raises more questions than answers with respect to the capacity of New Zealand accommodation providers to meet the halal tourism market. A clear issue is that can the frameworks developed for halal tourism in the Middle East or South-East Asia be applied to the New Zealand? One obvious response is that New Zealand accommodation has developed within a particular socio-cultural context in which some conservative interpretations of sharia are not going to translate in design terms. Nevertheless, questions still remain as to the extent to which the promotion of current accommodation offerings are going to be sufficient to attract moderate Islamic tourists.

Given that details of accommodation offerings was based on website content analysis rather than site visits it is possible that there may be more halal offerings available than what is promoted on-line. In reporting on halal food providers in New Zealand Wan Hassan and Hall (2003) and Wan Hassan (2008) noted that some providers felt that they did not need certification to prove the validity of halal claims as they relied on trust and the fact that they were good Muslims (see also Syed Marzuki et al., 2012a, 2012b for this in a Malaysian context), while word-of-mouth was also important to reinforce such claims. This may be the case with some of the accommodation providers in Auckland and Rotorua however while such an approach may be satisfactory for communicating to some VFR travellers it is not going to be appropriate for promoting accommodation to international tourists. Follow up mystery shopping checks of some accommodation providers only serves to reinforce the understanding that there is a potential gap with respect to the online promotion of the availability of halal offerings versus the willingness of some lodging operations to assist Islamic visitors. Although this situation creates significant issues for the promotion of halal tourism to New Zealand it does also provide a potentially fascinating line of research into online vs offline communication to potential Islamic and other guests that needs to be explored in the future.

Conclusion

New Zealand has been increasingly promoting itself as a Muslim-friendly destination in order to attract halal tourists. Long a major exporter of halal beef and lamb the country is now seeking to promote other halal offerings. However, the provision of halal tourism and hospitality and tourism is a much more complicated process than halal meat. It requires a substantially more nuanced understanding of Islamic consumers and their socio-cultural positioning and the different demands that this will have on suppliers. A number of different attributes of halal accommodation were identified from the literature (Battour et al., 2010; Henderson, 2010; Stephenson, 2014) and applied to a content analysis of accommodation provider websites from Auckland and Rotorua. Only 3 of the 367 websites analysed mentioned halal and, of these, only one noted certification.

Although options such as vegetarian food and self-catering are available in accommodation offerings. The overall level of appeal to Muslim tourists is likely to remain relatively limited in comparison with other countries that are seeking to attract Islamic tourism and which understand both the diversity within Islam and Islamic tourism. At the time of writing the level of knowledge of halal tourism and hospitality within the industry is limited, especially with respect to different understandings of halal and the degrees of tolerance that Muslim consumers may have for ‘standard’ accommodation services. To adequately respond to this situation will likely not only require changes to education and training so that halal knowledge becomes part of curricula but also changes in accommodation practices, including communication and promotion, and potentially, in the long run, design.

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Table 1: Content analysis of accommodation provider websites in Auckland and Rotorua

Attributes Noted on Accommodation Provider's Website	Auckland	%	Rotorua	%	Total	%
Mention halal	3	1.19	0	0.00	3	0.82
Multilingual staff	48	19.05	9	7.83	57	15.54
Family friendly	59	23.41	30	26.09	89	24.25
Pet friendly	13	5.16	9	7.83	22	6.00
Proximity to 'red light' district	0	0	0	0	0	0
Can cater to specific religious needs	1	0.40	0	0	1	0.27
Can provide prayer times	0	0	0	0	0	0
Can provide a prayer mat	0	0	0	0	0	0
Can provide a copy of the Quran	0	0	0	0	0	0
Provide Sky television (TV service)	141	55.95	58	50.43	199	54.22
Provide DVD players	58	23.02	29	25.22	87	23.7
Provide satellite or cable television	13	5.16	5	4.35	18	4.90
Provide multilingual TV channels	1	0.40	2	1.74	3	0.82
Provide movies	17	6.75	2	1.74	19	5.18
Pool onsite	83	32.94	43	37.39	126	34.33
Spa bath or pool onsite	109	43.25	79	68.70	188	51.23
Day spa onsite	10	3.97	5	4.35	15	4.09
Sauna onsite	22	8.73	11	9.57	33	8.99
Gym onsite	53	21.03	15	13.04	68	18.53
Proximity to gambling venues*	25	9.92	7	6.09	32	8.72
Serve food on their premises	196	77.78	65	56.52	261	71.17
Have in unit cooking facilities	170	67.46	74	64.35	244	66.49
Have a dining establishment onsite	123	48.81	50	43.48	173	47.14
Alcohol is served onsite	102	40.48	31	26.96	133	36.24
Have a bar onsite	85	33.73	21	18.26	76	20.71
Have room service	117	46.43	42	36.52	159	43.32
Have a mini bar	49	19.44	20	17.39	69	18.80
Certified halal items	1	0.40	0	0	1	0.27
Vegetarian options	35	13.89	5	4.35	40	10.90
Gluten free options	28	11.11	5	4.35	33	8.99
Dairy free options	12	4.76	0	0	12	3.27
Offers off-premises food options	10	3.97	3	2.61	13	3.54
Able to cater to special dietary needs	19	7.54	4	3.48	23	6.27
Have a <i>qibla</i> marker	0	0	0	0	0	0
Have a special prayer facility onsite	0	0	0	0	0	0
Female only floors	0	0	0	0	0	0
Gender segregated facilities	3	1.19	4	3.48	7	1.91
Total	252	100%	115	100%	367	100%

* Casino, TAB (betting agencies), racecourses

Figure 1: Value of Accommodation Attributes for Halal Tourism

	Positive	Neutral	Negative
All Muslim Tourists	<ul style="list-style-type: none"> Offers halal Can cater to specific religious needs Can provide prayer times Can provide a prayer mat Can provide a copy of the Quran Have a special prayer facility onsite Have a <i>qibla</i> marker Able to cater to special dietary needs Certified halal items Supports Islamic financial principles 	<ul style="list-style-type: none"> Multilingual staff Family friendly Provide Sky television Provide DVD players Provide satellite or cable television Provide multilingual TV channels Provide movies Offers off-premises food options Dairy free options Gluten free options Vegetarian options 	<ul style="list-style-type: none"> Pet friendly Proximity to 'red light' district Proximity to gambling venues Have a mini bar Have a bar onsite Alcohol is served onsite Proximity to gambling venues
Female Muslim Tourists	<ul style="list-style-type: none"> Gender segregated Female only floors 	<ul style="list-style-type: none"> Sauna onsite Day spa onsite 	<ul style="list-style-type: none"> Gym onsite Spa bath or pool onsite
Male Muslim Tourists		<ul style="list-style-type: none"> Gym onsite Day spa onsite Sauna onsite 	

Note: Assumes that onsite saunas and day spas are segregated by sex

Appendix B: Content Analysis Coding

Coding Key:

In all categories:

Not Mentioned = 0

Yes = 1

Location:

Auckland = 1

Rotorua = 2

Number of rooms:

Not Mentioned = 0

Type of establishment:

B&B = 1

Motel = 2

Hotel = 3

Qualmark rating:

No Qualmark rating = 0

3 Stars = 1

3 plus Stars = 2

4 Stars = 3

4 plus Stars = 4

5 Stars = 5

Qualmark enviro rating:

No Enviro rating = 0

Bronze = 1

Silver = 2

Gold = 3

TripAdvisor rating:

No TripAdvisor rating = 0

1 = 1

1.5 = 1.5

2 = 2

2.5 = 2.5

3 = 3

3.5 = 3.5

4 = 4

$4.5 = 4.5$

$5 = 5$

Appendix C: Secret Shopper Coding

Coding key:

Closed = 0

No = 1

Maybe = 2

Yes = 3

Location:

Auckland = 1

Rotorua = 2

Number of rooms:

Not mentioned = 0

Type of establishment:

B&B = 1

Motel = 2

Hotel = 3

Qualmark rating:

No Qualmark Rating = 0

3 Stars = 1

3 plus Stars = 2

4 Stars = 3

4 plus Stars = 4

5 Stars = 5

Qualmark enviro rating:

No Enviro Rating = 0

Bronze = 1

Silver = 2

Gold = 3

TripAdvisor rating:

No TripAdvisor Rating = 0

1 = 1

1.5 = 1.5

2 = 2

2.5 = 2.5

3 = 3

3.5 = 3.5

$4 = 4$

$4.5 = 4.5$

$5 = 5$