

# Halal Food Market Segmentation in New Zealand: New Opportunities for Indonesian Halal Food: A Systematic Literature Review (SLR)

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## ABSTRACT

The New Zealand halal food market is growing, presenting a significant opportunity for Indonesia's halal food industry. This market is segmented by demographics, lifestyle, and values, each with distinct needs. Indonesia has a competitive edge with its high-quality, diverse, and competitively priced products. This systematic literature review aims to identify these key market segments, understand their characteristics, and determine the implications for Indonesia's halal food industry. The review examines existing research on halal food market segmentation in New Zealand. By synthesizing the findings of these studies, this paper identifies the core consumer groups and their preferences. The analysis of these segments' characteristics provides insights that can inform targeted marketing strategies. This study is significant as it offers a comprehensive overview of the New Zealand halal food market, specifically from a segmentation perspective. The findings will assist the Indonesian halal food industry in developing effective strategies to penetrate the New Zealand market, ultimately increasing its market share and profitability. The results of this review underscore the potential for Indonesia to succeed in this promising market through a well-informed and strategic approach.

**Keywords:** *Market Segmentation, Halal food, New Zealand, Indonesian Halal Food Industry, Systematic Literature Review*

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## 1 Introduction

The global halal market has grown significantly in recent decades, not only in Muslim-majority countries but also in countries with minority Muslim populations. One of the countries showing an increasing demand for halal products is New Zealand. New Zealand, with its growing Muslim population, offers great opportunities for the global halal industry, including Indonesia, which has great potential in the halal industry.

The Muslim population in New Zealand has grown rapidly in recent years, reaching around 70,000 by 2023. This reflects a broader global trend: Islam is becoming a fast-growing religion worldwide. The growing Muslim population in New Zealand presents a significant opportunity for Indonesia's halal food industry to expand its reach and tap into a lucrative new market.

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Indonesia's halal food industry has a strong global reputation for its high-quality products and services. As the world's largest Muslim country, Indonesia has rich experience and expertise in meeting the needs of halal consumers. A strong ecosystem with an established supply chain, adequate infrastructure, and skilled human resources also supports the industry.

New Zealand, on the other hand, offers an attractive market for halal products. With a growing Muslim population and increasing awareness of the halal lifestyle, the demand for halal products in New Zealand is growing. The New Zealand halal market is also characterized by consumers with high purchasing power and a high level of education, which shows great potential for premium halal products.

Entering the New Zealand halal market presents a great opportunity for Indonesia's halal food industry. However, it is important to note that this market also has some challenges that need to be overcome. One of the main challenges is stiff competition from well-established countries in the halal industry, such as Malaysia, Australia, and Turkey.

Another challenge is the strict regulatory requirements for halal products in New Zealand. The Indonesian halal food industry needs to ensure that its products meet all these regulatory requirements to enter and compete in the market. In addition, it is important to understand the culture and preferences of local consumers to develop products and marketing strategies accordingly.

## **2 Materials and Methods**

### **2.1 Materials**

#### **2.1.1 Halal Tourism**

Halal Tourism is a tourism concept designed to meet the needs and preferences of Muslim travelers. This concept emphasizes the availability of services and facilities that follow Islamic religious principles, such as the provision of halal food and proper and accessible places of worship. Halal tourism is tourism that offers experiences following Islamic principles, and an increase in the Muslim population in the world, it can lift the growth of halal tourism (Crouch, G., 2011). Muslim tourists choose halal tourism destinations because they consider the factors of the availability of halal food, worship facilities, and a safe and friendly environment for Muslim tourists (Hussain, F. M., & Adcock, M., 2014). Halal Tourism in Malaysia can have a positive impact on the Malaysian economy by creating jobs and increasing income (Hamzah, N., & Ariff, M. S., 2016).

#### **2.1.2 Halal Market Segmentation**

Halal market segmentation refers to the systematic process of dividing the market for halal products and services into distinct consumer groups based on shared characteristics, motivations, and behavioral patterns. This segmentation is not merely a marketing tool but a strategic approach to align product development and branding with the diverse interpretations and practices of halal consumption. The segmentation process draws from classical marketing theory particularly Kotler's (1997) segmentation-targeting-positioning (STP) model adapted to the religious, cultural, and ethical dimensions of halal markets.

The evolution of the halal concept in the literature has expanded beyond its theological definition, which is rooted in Islamic jurisprudence, to include aspects of quality assurance, animal welfare, environmental sustainability, and ethical sourcing (Bonne & Verbeke, 2008; Wilson, 2014). This broader conceptualization influences how market segments are identified

and targeted, as halal consumers are not a monolithic group but vary in religiosity, awareness, and purchasing motivations. Understanding these nuances is essential for designing effective market strategies.

Halal market segmentation is the process of dividing the market for halal products and services into different groups based on their characteristics and needs. This segmentation is important to understand the needs and preferences of Muslim consumers better so that companies or countries can develop products and services that suit their target market. Halal market segmentation can be intended for 4 segments of Muslim consumers, namely highly religious Muslims, religious Muslims, moderate Muslims, and secular Muslims (Shaw, S. M., & Mohd Sabri, M. N., 2008). Halal market segmentation in Malaysia is based on demographic, psychographic, and geodemographic factors, with the results showing that there are five halal market segments in Malaysia, namely old religious Muslims, young religious Muslims, moderate Muslims, secular Muslims, and non-practical Muslims (Hamzah, N., & Musa, H., 2016).

Given the focus on Indonesia's halal food industry entering the New Zealand market, this study adopts a segmentation framework that integrates religiosity-based typologies with contextual factors relevant to minority-Muslim societies. By doing so, it aligns with the scientific evolution of the halal concept acknowledging its religious origins while recognizing its contemporary market drivers. This approach enables the identification of consumer groups whose purchasing behaviors are shaped by both faith-based requirements and broader socio-economic influences, thereby providing a more precise foundation for market entry strategies.

### 2.1.3 Characteristics of Halal Consumers in New Zealand

New Zealand is a country with a relatively small Muslim population, which is around 1.2% of the total population. Nevertheless, the halal market in New Zealand has shown rapid growth in recent years. This is driven by several factors, such as the increasing number of Muslim tourists, increasing awareness of the halal lifestyle, and increasing disposable income among Muslims. New Zealand has attractive tourism, so many Muslim tourists also choose New Zealand as a tourist destination. The motivation for Muslim tourists to choose New Zealand is the availability of halal food, worship facilities, and a safe and Muslim-friendly environment (Rahman, A., & Zainal, M. 2016). Muslim consumers in New Zealand have a positive perception of Halal products as products that are quality, safe, and follow Islamic principles (Husin, N., et al. 2017). Several factors assess Halal food purchased by Muslim consumers in New Zealand, namely halal certification, safety, and Islamic principles (Mujahid, R., & Siddiq, A. 2018).

### 2.1.4 The Indonesian Halal Food Industry in New Zealand

Indonesia, home to over 220 million Muslims, holds the world's largest Muslim population, making it both a dominant halal producer and an influential halal brand in the global market. New Zealand, conversely, is internationally recognized for its premium agricultural and livestock industries, positioning it as a high-quality supplier of raw and processed food products (Rakhmat & Zainal, 2017). The bilateral potential arises from Indonesia's capacity to meet halal certification standards and New Zealand's demand for diverse halal offerings amid a growing Muslim population.

Previous studies have highlighted several drivers of growth for Indonesian halal food products in New Zealand, including rising consumer demand, increasing awareness of halal lifestyles, and governmental support for halal industry development (Rakhmat & Zainal, 2017). Moreover, empirical evidence suggests a positive perception among New Zealand Muslim consumers toward Indonesian halal products, indicating a receptive market (Mujahid & Siddiq, 2019). However, research also identifies challenges such as high logistics costs and competition from established halal-exporting nations, including Malaysia, Australia, and Turkey (Rahman & Zainal, 2018).

While these studies provide valuable insights, they remain largely descriptive and fragmented, lacking an integrated framework for understanding Indonesia's market positioning in New Zealand. The literature rarely interrogates how consumer perceptions, regulatory compliance, and supply chain efficiencies interact to shape market outcomes. Furthermore, there is limited analysis of competitive differentiation strategies or long-term sustainability in market engagement. Addressing these gaps requires a synthesized approach that combines theoretical perspectives on halal market segmentation with empirical data on trade flows, consumer behavior, and regulatory environments.

Indonesia has the largest Muslim population in the world, with more than 220 million Muslims. This makes Indonesia a potential market for halal food products. New Zealand, on the other hand, is famous for its high-quality agricultural and livestock products. This makes New Zealand a potential source for Indonesian halal food products. The Indonesian halal food industry in New Zealand is still in its early stages of development. However, the industry has shown rapid growth in recent years. This is driven by several factors, such as the increasing demand for halal food products from Indonesia. Increasing awareness of the halal lifestyle in New Zealand and the New Zealand government's support for the development of the halal food industry. There are great opportunities for Indonesia to export halal food products to New Zealand (Rakhmat, R., & Zainal, M. 2017). Several challenges need to be overcome to develop the halal food industry in New Zealand, such as competition from other countries that also export halal products to New Zealand and logistics costs that tend to be high (Rahman, A., & Zainal, M. 2018). There is a positive perception of New Zealand Muslim consumers towards Indonesian halal food products (Mujahid, R., & Siddiq, A. 2019).

#### 2.1.5 Challenges and Opportunities for the Indonesian Halal Food Industry in New Zealand

The Indonesian halal food industry possesses considerable potential for expansion in the New Zealand market, supported by demographic and cultural shifts. New Zealand's Muslim population—although a minority—has grown steadily, accompanied by rising consumer awareness of halal standards as a marker of quality, safety, and ethical production. From a market segmentation perspective, this creates a niche segment that values authenticity, religious compliance, and premium product attributes, which Indonesian producers are well positioned to deliver.

However, several structural and operational challenges must be addressed to capitalize on this potential. First, consumer awareness of Indonesian halal food brands in New Zealand remains limited, reducing brand recognition and market penetration (Rahman & Zainal, 2018). Second, competition in the halal segment is intense, with established exporters from Malaysia, Pakistan, and various Middle Eastern countries already holding significant market

shares. These competitors often benefit from strong bilateral trade relations and longstanding brand presence, creating barriers to entry for new players. Third, regulatory requirements for halal certification in New Zealand, while stringent, lack full harmonization with Indonesian standards. This misalignment can result in delays in product approval and additional compliance costs. Moreover, high logistics expenses for exports from Indonesia to New Zealand can raise final retail prices, reducing price competitiveness in a market sensitive to value-for-money considerations.

Despite these challenges, notable opportunities exist for Indonesian halal food exporters. Government-level cooperation between Indonesia and New Zealand could facilitate mutual recognition of halal certification, streamlining market entry processes. Furthermore, if Indonesian halal products consistently meet or exceed quality expectations, this can enhance brand reputation and foster long-term consumer trust (Mujahid & Siddiq, 2019). Such credibility not only strengthens the food sector but can also indirectly reinforce Indonesia's image as a global halal hub. Additionally, segmentation data suggest that Muslim consumers in New Zealand hold favorable perceptions of Indonesian halal products, indicating an opportunity for targeted marketing campaigns and distribution strategies that cater specifically to this consumer group.

Critically, while previous studies have highlighted either the opportunities (Mujahid & Siddiq, 2019) or the challenges (Rahman & Zainal, 2018) in isolation, few have offered an integrated view that examines both dimensions in the context of market segmentation. This study contributes by synthesizing these perspectives, situating them within the broader theoretical framework of halal market development, and identifying strategic pathways for Indonesian exporters to compete effectively in the New Zealand halal food sector.

## 2.2 Methods

### 2.2.1 Research Approach

This study used a systematic literature review to answer the formulated research questions. A systematic literature review is a structured and systematic research method to identify, evaluate, and synthesize evidence from the literature relevant to a particular topic. This approach was chosen because of the possibility to collect and analyze comprehensive and accurate information about the main market segments for the halal food industry in New Zealand.

### 2.2.2 Determination of Research Questions

The main research questions to be answered are: "What are the main market segments for the Indonesian halal food industry in New Zealand?" This research question is formulated by considering the research objectives, namely to identify and understand the different market segments for halal food in New Zealand. This question is focused and specific enough to enable the collection of relevant and useful data.

### 2.2.3 Literature Search

Relevant literature was identified through a search of various Science Direct academic databases. The keywords used in the search were “New Zealand Halal Tourism” and “Indonesia Halal Food Industry”.

#### 2.2.4 Literature Selection

The literature retrieved is the result of the two keyword searches above, each taking a 10-year time interval, starting in 2013 and ending in 2023, with a relevant literature base and evaluated based on its quality and relevance to the research question.

#### 2.2.5 Data Analysis

The data extracted from the literature was analyzed thematically to identify the key market segments involved in the study.

#### 2.2.6 Synthesis of Findings

Findings from data analysis are processed to produce a comprehensive conclusion about the main market segments for halal food in New Zealand. This conclusion is expected to contribute to the understanding of the halal market in New Zealand and help the Indonesian halal food industry to develop appropriate strategies for reaching this market.

#### 2.2.7 Research Limitations

This research has several limitations, namely, the availability of data on the halal food market segment in New Zealand tends to be limited, which may affect the comprehensiveness and generalizability of the research findings. Second, focusing on literature in English, it is feared that there will be bias in the research findings because literature published in Indonesian cannot be identified. Thirdly, this research is qualitative, which is interpretive and subjective, hence, the research findings may vary depending on the interpretation of the data.

### **3 Results and discussion**

#### 3.1 Journal Publication Trends “New Zealand Halal Tourism”

In Figure 1, it is found that there are a total of 180 journal publications in the span of ten years starting in 2013-2023 found in the Science Direct database, of which only 32 are included in open access, assuming that the majority of journals are not publicly available and must pay if you want to get the journal. The trend of journal publications about New Zealand Halal Tourism has initially existed since 2003, but from 2014 to 2023, the trend shows that every year the publications per year consistently take dozens to dozens of journals. Shows that interest in New Zealand halal tourism began to increase in 2014. Since then, the trend shows consistency above 10 journals per year, where there is a spike from 2019 to 2022, according to the graph in Figure 1. It is concluded that the world of New Zealand halal tourism shows a good trend based on the academic database of research journals declared feasible and relevant.

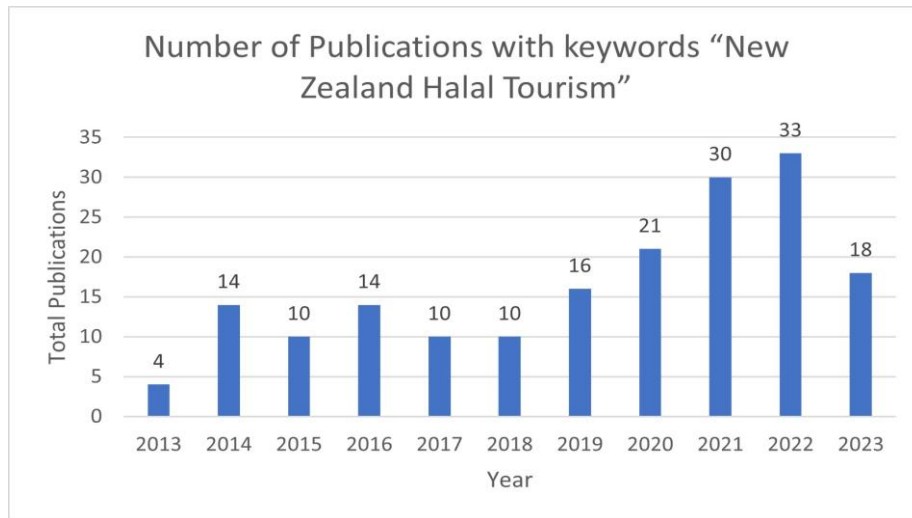


Fig 1. Graph of Number of Publications with the keyword “New Zealand Halal Tourism”

### 3.2 Journal Publication Trends “Indonesia Halal Food Industry”

In Figure 2, it is found that there are a total of 517 journal publications in the ten years starting in 2013-2023 found in the Science Direct database, where there are only 124 that are included in open access, assuming that the majority of journals are not publicly available and must pay if you want to get the journal. The trend of journal publications on the Indonesia Halal Food Industry has initially existed since 2000 but began to show massive publications from 2013 to 2023. The trend shows that the publications per year consistently take dozens to dozens of journals. Shows that interest in the Indonesian Halal Food Industry began to increase in 2014. Since then, the trend has shown consistency above 30 journals per year, where there are spikes in 2014, 2016, and 2019 to 2023, according to the graph in Figure 2. It is concluded that the world of the Indonesian Halal food industry shows a good trend based on the academic database of research journals declared feasible and relevant.

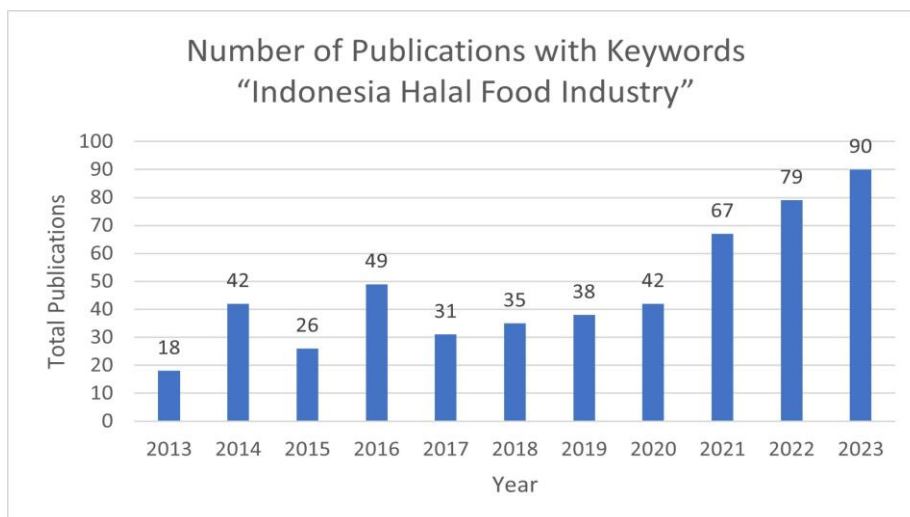


Fig 2. Graph of Number of Publications with the keyword “Indonesia Halal Food Industry”

### 3.3 Area Analysis on “New Zealand Halal Tourism” Research

Halal tourism is a growing industry with various research groups working on this topic. As the table below shows, Business, Management, and accounting are the main focus of halal

tourism. This finding may occur because the most discussed research topics in the fields of business, management, and accounting related to halal tourism are the motivation of Muslim tourists to choose New Zealand as a halal tourism destination and Muslim tourists' perceptions of halal tourism products and services in New Zealand. Challenges and opportunities for the development of halal tourism in New Zealand. Other fields of study are social sciences with 56 publications, economics; then there is environmental science with 39 publications, agricultural and biological sciences with 37 publications, then economics, econometrics, and finance with 21 publications. The findings show that halal tourism can be researched through several fields of study so that it can influence policymakers. As a result, tourism can increase the country's foreign exchange.

Table 1. Research Area table with keywords "New Zealand Halal Tourism"

Rank	Research Area	Publications
1	Business, Management, and Accounting	69
2	Social Sciences	56
3	Environmental Sciences	39
4	Agricultural and Biological Sciences	37
5	Economics, Econometrics, and Finance	21

### 3.4 Area Analysis on "Indonesia Halal Food Industry" Research

Indonesia's halal food sector is a growing industry with various research groups working on this topic. As the table below shows, there are 182 publications in agricultural and biological sciences related to the halal food industry. This shows that there is high interest in this topic from academics and researchers. The fields of agricultural and biological sciences discuss this the most with a total of 182 publications and discuss several matters related to the halal industry, namely halal food product development, halal certification, halal food safety, and marketing of halal food products. Then, following other fields of study are social sciences with 99 publications, environmental sciences with 87 publications, business, management, and accounting with 71 publications, and then economics, econometrics, and finance with 41 publications. These findings indicate that the Indonesian halal food industry can be researched through several fields of study to see the sectors that are strengthened in the industry. Indonesia's halal food industry has great potential to grow. However, this industry still faces several challenges that need to be overcome. The government, industry players, and the community need to work together to improve the quality of halal food products, strengthen industry competitiveness, and develop human resources in the halal food industry.

Table 2. Research Area table with keywords "Indonesia Halal Food Industry"

Rank	Research Area	Publications
1	Agricultural and Biological Sciences	182



2	Social Sciences	99
3	Environmental Sciences	87
4	Business, Management, and Accounting	71
5	Economics, Econometrics, and Finance	41

### 3.5 Source New Zealand Halal Tourism Journal

The journal sources that issued many publications were Tourism Management and Tourism Management Perspectives, which issued the same number of publications with 9 publications then followed by the International Journal of Hospitality Management, Annals of Tourism Research, and Journal of Hospitality and Tourism Management with 6 publications each. The journal focuses on research on tourism management, with several topics such as choosing halal destinations in New Zealand, as well as halal tourism products and services in destination countries. Some journals also discuss the impact of halal tourism on the economy and society of New Zealand, as well as how effective strategies can market halal tourism well and on target. With several publications that have been published by the journal, it can make a significant influence on the development of the halal tourism industry in New Zealand by understanding the needs and preferences and the quality offered.

Table 3. Journal Sources with keywords "New Zealand Halal Tourism"

Rank	Research Area	Publications
1	Tourism Management	9
2	Tourism Management Perspectives	9
3	International Journal of Hospitality Management	6
4	Annals of Tourism Research	6
5	Journal of Hospitality and Tourism Management	6

### 3.6 Source Indonesia Halal Food Industry Journal

The source of journals that issued many publications was Procedia - Social and Behavioral Science, which issued 22 publications, followed by Heliyon with 13 publications, then Food Control with 10 publications, and Tourism Management with 9 publications and Meat Science with 8 publications. The journal focuses on research on halal food, including the halal food industry, as well as consumer behavior towards halal food products, by discussing topics such as the motivation of Muslim consumers to buy halal food products and the influence of social and cultural factors on the consumption of halal food products. Some journals also discuss how to control the quality of halal food, including halal food safety such as analyzing halal content in food products and strategies to ensure halal food safety. With several publications that have been published by the journal, it can make a significant impact on the development

of Indonesia's halal food industry by helping to analyze the development of the halal food industry abroad, as well as improve product quality in order to compete when exporting abroad, so that it can increase competitiveness and human resources in the field of Indonesia's halal food industry.

Table 4. Journal Sources with keywords “Indonesia Halal Food Industry”

Rank	Research Area	Publications
1	Procedia - Social and Behavioral Science	22
2	Heliyon	13
3	Food Control	10
4	Tourism Management	9
5	Meat Science	8

### 3.7 Comparison with Other Halal Market Contexts

The segmentation findings in New Zealand can be enriched by comparing them with two well-documented halal market contexts: the United Kingdom (UK) and Australia. Lever et al. (2025) demonstrate that the UK halal sheep market has evolved through ongoing *performance struggles*, where controversies surrounding slaughter methods (stunned vs. non-stunned) have never completely disappeared but instead shifted through processes of *b/ordering* and value negotiations. This has resulted in an interdependent “dual market,” in which the sustainability of the sheep farming sector relies heavily on Muslim consumers with differing preferences. Such segmentation indicates the importance of dual strategies: on the one hand, emphasizing authenticity and strict Shariah compliance, and on the other hand, aligning with industry standards and animal welfare to meet broader ethical, political, and economic demands.

The Australian case complements this picture. Nurrachmi (2017) highlights that although the Muslim population in Australia is relatively small, the country has become one of the largest global halal exporters due to commercialized farming systems, strong government support through the *Australian Government Authorized Halal Program*, and its export orientation toward OIC member countries. Interestingly, non-Muslim consumers also purchase halal products because they are perceived as safer, more hygienic, and fresher. This demonstrates that halal is not only understood as a religious requirement but also functions as a universal proxy for food quality. In the context of global trends, the acceptance of halal by non-Muslims as a marker of safety and quality further broadens the reach of halal markets beyond religious identity.

From an SLR perspective, these cases affirm an emerging global trend: halal markets in minority-Muslim societies (such as the UK, Australia, and New Zealand) tend to construct a dual narrative—halal as *faith-based authenticity* and halal as *market-based quality assurance*. This duality illustrates the dynamic nature of halal, shaped not only by religious values but also by political (e.g., Brexit in the UK), economic (e.g., global food crises), and cultural (e.g., non-Muslim perceptions of quality) factors. New Zealand, as an export-oriented country with

a small Muslim population, occupies a similar position, making lessons from the UK and Australia directly relevant.

### 3.8 Strategic Implications of Segmentation for Marketing and Product Development

The identification of consumer segments in New Zealand provides significant strategic implications for Indonesian halal food exporters. First, for the *authenticity-driven segment*, product strategies should highlight certification from credible halal authorities, ensure transparency of slaughter methods, and design offerings tied to religious occasions, such as Qurbani packages during Eid. This mirrors developments in the UK, where the growing Qurbani market reshaped supply chain practices and demonstrated how spiritual obligations can evolve into high-value niche markets.

Second, for the *safety- and quality-conscious segment*, marketing should emphasize freshness, hygiene, and traceability, appealing to both Muslim and non-Muslim consumers. This is consistent with Nurrachmi's (2017) finding that non-Muslims in Australia are drawn to halal products because of their perceived safety and cleanliness. Thus, halal can be positioned not only as religious compliance but also as a broader food quality standard.

Third, for the *value-oriented segment*, exporters should develop family packs, bulk offers, and affordable cuts to meet household economic needs, while also improving carcass utilization. In the UK, yield management strategies have been applied to optimize the value of cuts for both domestic and export markets, providing a model that Indonesian exporters could adopt to reduce waste and increase competitiveness.

From a distribution perspective, marketing channels should be aligned with segment needs: independent halal butchers for authenticity-seeking consumers, supermarkets and online grocery platforms for quality-driven buyers, and discounters for price-sensitive households. Marketing communication should also be differentiated: emphasizing Shariah compliance, spirituality, and authenticity for Muslim audiences, while promoting safety, cleanliness, and quality for broader audiences. This reflects an emerging global trend where halal serves as a *bridge* between religious identity and mainstream consumer needs.

## 4 Conclusion

Our findings align with the objectives of this SLR in identifying emerging trends in halal markets. Consumer segmentation not only explains current purchasing behaviours but also provides valuable insights into future developments, including the increasing commercialisation of halal, the growing acceptance among non-Muslims, and the need for adaptive marketing strategies. Thus, this study contributes not only to understanding the empirical case of New Zealand but also to the broader global literature on the diffusion and transformation of halal markets.

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