STUDY ON MUSLIM FRIENDLY TOURISM BRANDING IN THE GLOBAL MARKET

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LIST OF ABBREVIATIONS

AENOR	Associacion Espanola de Normalizacion y Certificacion
ART	Arab Radio and Television
ASEAN	Association of Southeast Asian Nations
B&B	Bed and Breakfast
BERNAMA	Malaysian National News Agency
BUMITRA	Bumiputera Travel and Tour Agents Association of Malaysia
COMCEC	Standing Committee for Economic and Commercial Cooperation of OIC
DSM	Department of Standards of Malaysia
GCC	Gulf Cooperation Council
GMP	Good Manufacturing Process
GMTI	Global Muslim Travel Index
HACCP	Hazard Analysis Critical Control Point
HFA	Halal Food Authority
HFF	Halal Food Foundation
HIT	Halal International Tourism
HSIT	Halal Standard Institute of Thailand
IATA	International Air Transport Association
ICDT	Islamic Center for the Development of Trade
IIUM	International Islamic University of Malaysia
INHART	International Institute for Halal Research and Training
ITB	International Tourism Bourse
ITC	Islamic Tourism Center
JAIN	Department of State Religious Affairs of Malaysia
JAKIM	Department of Islamic Development of Malaysia
JIExpo	Jakarta International Expo
KL	Kuala Lumpur
KLIA	Kuala Lumpur International Airport
LCC	Low Cost Carriers
LEED	Leadership in Energy and Environmental Design
MAH	Malaysian Association of Hotels
MAHO	Malaysian Association of Hotel Owners
MAIN	State Islamic Religious Council of Malaysia
MANZ	Motel Association of New Zealand
MATTA	Malaysian Association of Tour and Travel Agents
MF	Muslim Friendly
MFHS	Muslim Friendly Hospitality Services
MFT	Muslim Friendly Tourism

MICE	Meetings, Incentives, Conferencing, Exhibitions
MOML	Moslem Meal
MTGC	Malaysia Tourist Guides Council
MTSI	Muslim Travel Shopping Index
MUI	Majlis Ulema Indonesia
NA	North Africa
NGO	Non-Governmental Organization
OIC	Organization of Islamic Cooperation
PERMIM	Persatuan India Muslim Malaysia
PPP	Public Private Partnership
SESRIC	Statistical, Economic and Social Research and Training Center for Islamic Countries
SME	Small and Medium Enterprises
SMIIC	The Standards and Metrology Institute for the Islamic Countries
TA	Travel Agent
TAT	Tourism Authority of Thailand
TCA	Tourism and Culture Authority
TC	Technical Committee
TO	Tour Operator
UAE	United Arab Emirates
UK	United Kingdom
UNWTO	United Nations World Tourism Organization
VMY	Visit Malaysia Year

EXECUTIVE SUMMARY

This report has been commissioned by the ICDT. It deals with Halal Tourism branding in the global market. Travel & tourism are some of the biggest economic drivers today, as they contribute greatly to the economic advancement of the world. Since the OIC countries have inherent strengths to cater to the Muslim travelers, they have a unique opportunity to gain a greater share of this growing segment. Given the demographic fact that by 2020, the Muslim population will be around 26 % of the world's population, the Muslim travel market should witness a sustained growth beyond 2020. Muslim travelers are becoming a significant segment within the global travel and tourism sector.

I. THE CONCEPT OF MFT

The study starts with the analysis of the concept of MFT tourism and its various components. It discusses the opportunities and challenges in developing and marketing MFT. Knowledge of MFT, its definition and components is pertinent to tourism industry players. It will help policy makers design specific actions.

What is MFT? The concept is built from a comprehensive literature review. There seems to be a consensus around the meaning of MFT as a type of religious tourism that is in conformity with Islamic teachings. MFT is any tourism object or action that is permissible according to Islamic teachings to use or engage by Muslims in tourism industry. The context of development of MFT is complex. Along with multiculturalism and globalization, there is a tendency of socio-political difficulties, namely that of Islamophobia. However, in spite of this current climate, researchers do predict a great success for the future of MFT industry. There is a great diversity of nations in the Muslim World, due to a historical process of cultural hybridization. The 57 OIC member states are experiencing a" moment of cultural relocation". In this regard, tourism could become one of the ways to bring higher knowledge of places, and to build bridges between different cultural identities.

This rapid growing new trend of demand for halal products is due to changes in the social and economic conditions of predominantly Muslim nations and it is requiring an **Islamic Marketing and Branding.** The concept of Islamic marketing is relatively new. Thus, a sound understanding of the MF guidelines is essential. The rising demand for halal food internationally has made the halal food market extremely lucrative. Adapting to religious needs, Islamic hospitality has also developed over the past decades and has become an important part of the hospitality and food service industry. It has been possible to identify the following aspects as essential to MFT: accommodation, design, worship facilities, halal food, banning of alcohol, gambling and sexual permissiveness, health and recreational facilities, gender segregated facilities, price, dress code of staff, location, cleanliness, personnel and service encounter, intercultural service encounters, certification and rating.

II. THE CURRENT SITUATION OF MFT. DATA AND STATISTICS

Tourism experts are expecting the number of Muslim visitors to increase and reach about 180 million by 2020. Total of tourist arrivals is expected to increase in the OIC countries. Non-OIC member states are actively seeking to attract Muslim travelers. Countries like Singapore, the UK, Germany, France, and more recently, countries like Japan, Korea and Australia have sought to attract Muslim travelers.

OIC regional grouping analysis allows discovering that by 2020, the Arab region would probably have the highest average inbound expenditure among OIC member states. The Asian region will witness a strong growth in Muslim Arrivals. However, the African region will witness a lesser strong inbound tourist arrivals. Within the top Muslim outbound markets, Malaysia is the leader in the outbound travel market from the OIC member states, followed by Indonesia and Turkey.

III. THE STANDARDS AND CERTIFICATION OF MFT

1 The Standards of MFT: The notions of halal and haram (licit and illicit, or permissible and non-permissible) remain constant regardless of any other considerations (like nationality for instance). 'Halal hotels' can also be classified or qualified as halal if their space is organized to include things like prayer facilities, separate swimming pools and/or beach areas for men and women, among other requirements. MFT also encompasses airlines, airports, cosmetics, clothing, pharmaceuticals and financial services. It means a generally MF environment.

Halal Certification is a recognition that the products are permissible under Islamic law. These products are thus edible, drinkable or usable by Muslims. It helps to build consumer's confidence without suspicion or doubt. It is an authoritative and reliable testimony to support MF requirements. Hence, it is necessary for MFT to take a holistic approach in serving Muslim needs.

The effects of halal certification on hotel performance are significant**.** Halal certification process is creating organizational competitive advantage and has a positive effect on six dimensions of performance, which are personnel qualification, employee motivation, and employee multi-skillfulness, efficiency, environmentally conscious and cost saving. However, only two variables are directly related to hotel performance: facilities at the premises, and staff policy. The main downsides of certification are: price, consistency, and implementation.

IV. MFT DESTINATIONS. CASE STUDIES FROM OIC MEMBER STATES

Both predominantly Muslim and Non-Muslim countries have embraced the idea of catering to this growing tourist market by providing goods and services. The current positioning of OIC member states in MFT can be categorized in to 4 clusters; Group A: Leaders, Group B: Best Positioned for Growth, Group C: Potential for Growth and Group D: Need to Develop. In this study, we have selected the following countries as case studies: Malaysia, Indonesia, Turkey, UAE, Thailand, UK, Spain, and New Zealand. All case studies are desk based. The reasons behind this selection are diverse.

1. MALAYSIA

Tourism is a huge sector of the Malaysian economy. Malaysia is the top tourist destination among ASEAN member states. Malaysia has been making efforts to brand itself as an Islamic and halal hub in recent years.

Malaysia's Strategy in targeting Muslim market: After the September 11 attack, Malaysia has moved more aggressively to take advantage of the Muslim market, making both **efforts through large-scale campaigns and efforts through smaller businesses.**

What are Malaysia's Islamic offerings? Inclusion of Mosques and prayer facilities, Halal food, existence of local Muslim communities, stability and safety of the country, and an online image of Malaysia as an Islamic hub. Malaysia has understood very early the opportunities of MFT: activating the whole industry to make MFT a priority market, a more aggressive branding and positioning of Malaysia in MFT, developing of new Islamic products and services, enhancing Muslim travelers' awareness about the various offerings of Malaysia, involving more media and Travel Agents, employing Muslims from other countries. Malaysia is also benefitted from identifying the Muslim market as a priority, its early political commitment, its Islamic funding and financing, the implementation of most basic services, its MF healthcare services, the visa free access for Arabs and GCC nationals, an extensive education and training programs, and the development of standards and guidelines.

Finally, **Malaysia's MFT goes beyond** the food and drink sector. It includes Halal logistics, Halal fashion, and the strong drive of other regions of the country.

2. INDONESIA

Indonesia has taken Strategic Initiatives to implement MFT. It is expected to witness an increase in the inbound Muslim tourist arrivals. The overall tourism receipt of Indonesia has also increased in a steady pace. Indonesia has a wide range of tourism experiences with availability of MF facilities at tourist spots and public premises, well-developed attractions and entertainment options offering shopping and outdoor activities, many emerging MF hotels, and the ability to cater to the needs of the Muslim tourist. It is a value for money destination in offering family Islamic tourism. Indonesia has been branding and positioning herself in MFT; engaging news media to increase awareness about MFT offerings, developing MFT infrastructure, organizing themed campaigns for Muslim families, etc.

Tourism in Indonesia is a significant source of its foreign exchange revenues.. Other parts of Indonesia are hoping to benefit from the initiative as well. Indonesia is making efforts to entice foreign investors for hotels and beach resorts, eyeing mainly potential developers from GCC countries such as Saudi

Arabia, UAE and Qatar. MFT has been recognized as "an opportunity market" by Indonesia, inspired by its neighbor Malaysia's success. To improve, Indonesia in a first step is now positioning different regions of the country as MF destinations.

3. **TURKEY**

Currently, it is ranked as the fourth most popular destinations for the Muslim tourists in 2017. (http://www.crescentrating.com/travel-index-ranking.html). . MFT market is growing fast in Turkey with strong domestic and inbound travel demand. For a long time, Turkey has been one of the top ten tourist destinations in terms of tourist arrivals. Political stability of the country in the years 2000s has resulted in improvements in many areas including infrastructure building, international relations and event management.

MFT Industry in Turkey: The start of mass tourism activity was with famous Tourism Incentive Act in 1982. The last decade (2002-2012) has been one of political stability and economic development. Turkey has made tremendous efforts to boost tourism: planning and infrastructure, recognition in European and Russian markets, promotion activities, increase in tourist numbers, product diversification, intensification of MFT, and a holistic tourism planning through the Turkish Tourism Strategy 2023. There is a large diversity in the types of MFT activities and resorts. The strong activity on the Internet has been crucial in branding the country as a tourism destination. This is also true for MFT.

Strengths of Turkey: Turkey has benefitted from the development of its middle class, and has thus designed different types of markets. In addition, it is culturally present in the Arab and GCC countries, thanks to its cultural industry products. Geographically, Turkey is close to Europe, to Arab and GCC countries. It takes the most from its natural beauty, cultural diversity, and Islamic history. It has developed a strong infrastructure. It is implementing most MFT requirements.

ABOUT KONYA

The Characteristics of Tourism in Konya: The role of Mawlawi tourism in the urban development process of Konya is important, and falls in a new modernization approach, the global local nexus approach. Within the diversification in the global tourism, Mawlana tourism can be defined as a cultural, religious, and spiritual tourism. It connects Konya to the global markets. The Mawlawi Sema Ceremony, which was proclaimed a Masterpiece in 2005 within the UNESCO Masterpieces of the Oral and Intangible Cultural Heritage of Humanity Program, was registered on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity in 2008 on behalf of Turkey and thereby introduced to the world. The year 2007 has been declared as the year of Mawlana.

A "glocal" process: marketing local to global: Differentiation and uniqueness are crucial to attract tourists. The marketing and commoditization of locality in the global capitalism can be seen in the case of the marketing of Mawlana to attract foreigners to Konya. Nevertheless, the Mawlawi tourism could be used as a tool for other aims, such as establishing business connections, articulating the city to the global markets, mainly to Islamic countries.

4. **UNITED ARAB EMIRATES**

UAE is one of the fastest growing destinations for Muslim visitors. UAE is expected to witness the fastest growth in inbound Muslim visitor arrivals. Visitors into UAE come principally from Arab and GCC countries, especially Saudi Arabia, Europe (25 percent) and Asian countries (20 percent). Emirates airlines operating out of Dubai is also a major contributor to tourism growth to UAE.

Strengths and challenges for the UAE' MFT segment: The UAE is taking advantage from its political stability and economic wealth. It has become a very popular tourism destination, attracting families and MFT, and a leader in Islamic finance. Dubai is considered as the Islamic Capital of the world. The government is making continuous efforts to promote tourism and travel. Tourism in UAE encompasses all types of travel: leisure, business and healthcare. Emirates connecting UAE with the world. Other LCC are developing. UAE is hosting numerous world tourism events.

V. MFT DESTINATIONS. CASE STUDIES FROM NON OIC MEMBER STATES

5. THAILAND

Thailand, like most ASEAN countries, is trying to attract more Muslim tourists from all over the world by providing more facilities in accordance with religious beliefs. It aims to become one of the world's top five halal exporters by 2020.

Thailand is targeting Muslim travelers: Thailand is positioning itself as a MF destination by pushing MF tourism, launching and adapting marketing incentives for Muslim travelers, showing prominent Muslim landmarks or visiting Muslim communities in Thailand. It was ranked second within the most popular destinations for Muslim tourists from all over world (in the category of non-Muslim countries), behind Singapore and ahead of the UK. It is focusing on source markets such as the GCC, especially the UAE, Kuwait, Qatar and Oman, as well as Iran, Egypt, Morocco, Tunisia and Algeria.

Thailand's MF destination strategy goes beyond just tourism: Thai government is mindful of building inclusive societies, preventing religious and ethnic conflict, and contributing to ASEAN integration. Thailand is already one of the world's biggest food exporters to the OIC countries. Halal certification in Thailand was initiated in 1969. Presently, Thailand gets an estimated three million Muslim visitors a year. The next generation of Muslim visitors will flow from Central Asian Republics, North Africa, Europe, South Africa and elsewhere. Muslim visitors are both a quality and quantity customer segment.

Broader development strategies: Analysis reveals that Thailand has **an e**xtensive knowledge in MFT: spa tourism, healthcare related services, entertainment, etc. It benefits from skilled labor, the tourism industry is innovative and creative, targeting market to ASEAN and GCC countries. Thai cuisine is quite famous. However, there seems to be no real integration of services.

6. UNITED KINGDOM

Some general Data: The United Kingdom is a popular destination among Muslim travelers and is home to a large percentage of Muslims. London, the capital of England, is one of the most visited cities in the world and is home to the largest Muslim population in the country. This cosmopolitan city draws visitors from around the globe including Muslims. So is also the case of cities like Bradford, Luton, Blackburn, Birmingham, Dewsbury, Leicester, Derby, Manchester and Liverpool.

Strengths and challenges for the UK's MFT segment: There is a steady growth of Muslim visitor arrivals to the UK. In 2014, Muslim Visitor arrivals to the UK accounted for 6.6 percent of the total arrivals compared to 6.0 percent in 2010. The key strength is its local Muslim population. UK has over 2.8 million Muslims people, which is a large population for a non-OIC country. This has resulted in the development of a many Halal food and MF services.

The UK has a long history with the Muslim World. The country has improved key standards in products and services, the consumers are granted more protections.Tourism supporting more jobs in UK. There is a long recognition of importance of MFT market in Tourism growth. Muslim visitor growth is from OIC countries.However, higher quality of products and services will be demanded in the future, across all tourism sectors, and other European destinations are becoming more competitive.

7. SPAIN

Some General Data on the Challenge of Conquering the Growing MFT: MFT in Spain represents 4% of all tourism of the country in 2014, reaching 2.6 million tourists. Spain is the sixteenth country most visited by Muslim travelers and the country holds annually a large trade fair, Spain Halal Expo. The MFT is one of the segments that is growing, according to all forecasts. 1.2 million Muslim tourists visited Spain in 2014 and in the first six months in 2015, 600,000, according to the Ministry of Industry, Energy and Tourism. In 2014, Spain was the preferred country among the top 10 destinations outside the OIC. It held the ninth position, ahead of Taiwan and behind the United States. In the first places, we find Hong Kong, Belgium, France, South Africa, UK, Thailand and Singapore. Globally, including member countries of the OIC, Spain occupies the position 35, according to the Muslim Travel Index 2015, an indicator that values the suitability of a country to meet the needs of tourists.

Spain has taken initiatives to promote MFT: There is a Halal Certification in Spain. Some strategies to promote MFT have been designed: Adaptation of hotels for Muslims, **stronger** promotion of the cultural and natural heritage of Spain and the different possibilities of Spain for tourism business. In addition to easy issuance of tourist visas in the Gulf countries. Tourists from the Middle East are the biggest spender visitors in Spain. Promoting Spanish tourism in the GCC countries is planned and coordinated. Increasing flights from Dubai and Qatar to Madrid and Barcelona is having a catalytic effect. Spain is very well perceived as a holiday destination by Muslim travelers. These are families especially upper-middle and upper class. There is also a high interest in leisure.

Analysis shows that Spain has a strong presence of Islamic Culture, Spanish cuisine is famous worldwide, air connections with Arab and GCC countries are available and frequent. Spain is meeting many MT expectations through its numerous offerings: gastronomy, football, climate, security, Arab Legacy, coastline, shopping, Romance, etc. Spain is announcing plans to intensify MFT promotions, especially in GCC countries. Its proximity of other European countries and Morocco is another advantage. Nevertheless, Spanish compliance with MFT requirements is still poor.

8. NEW ZEALAND

Tourism is a rather new economic activity in NZ. The second largest export category after dairy, tourism is integral to New Zealand's economy. Tourism leverages some of NZ's major assets, the scenery and cultural heritage, particularly the cultural heritage of Māori.

There are some MF accommodation providers in NZ. Some MF attributes are mentioned by accommodation providers on their websites. More accommodation providers willing to provide MF attributes. However, there is a problem with their real availability. NZ's tertiary institutions revealed that only one tertiary institution included halal food preparation as part of their curriculum. There are also efforts being made in NZ to engage in this rising phenomenon. Tourism New Zealand co-produced a halal food guide to NZ.

The role of websites in communicating MFT attributes: NZ accommodation providers are heavily relying on the Internet. Communicating on the availability of MF services is considered as essential in attracting Muslim tourists. Digital media is becoming an important step in the consumer decision-making process.

Marketing and promotion of NZ as a MFT destination: NZ Analysis shows that the country has huge touristic potential to develop MFT: Spectacular landscape, natural beauty, diversity, exotic appeal, the cultural heritage of the Maori, etc. Among the growing travel markets worldwide, NZ is trying to improve its positioning. Like the Chinese market, the MF market is emerging, especially from the GCC and South East Asia regions. However, Muslim tourists have not been identified as targets for value, and there are no explicit strategies on targeting the MFT segment. In addition, there is only a poor knowledge of MFT requirements in NZ, thus impacting the quantity and quality of offers. There are almost no promotions. Staff is not trained to meet the MF requirements.

To sum up, NZ missing the opportunity to position itself on the MFT market and segment, especially when it is trying to improve its competitiveness. Other emerging economies are on the same track. Indonesia, India and Latin America have been identified as long-term high value targets. Australia, the neighboring country is doing better to attract Muslim tourists. Concerning product and service development as a whole, there are no explicit strategies to target the Muslim segment of travelers in NZ. Although this would be economically profitable.

VI. CONCLUSIONS AND RECOMMENDATIONS

At the end of this study, we can formulate certain conclusions and recommendations related to areas covering directly the MFT sector. Their implementation will allow OIC member states to better position themselves in the MFT market and gain a higher share of the Muslim visitor arrivals. These recommendations can be classified in three categories.

Systemic and sub systemic recommendations: These are: 1. Dealing with Systemic Variables, 2. Maximizing the inherent strengths of OIC member states, 3. Developing a MFT Alliance both on a regional a sub-regional levels, 4. Developing a Global and Comprehensive MFT Policy, 5. Governments Involvement, 6. Investing in MFT Industry, 7. Enhancing Research on MFT, 8. Developing an environment for innovation and entrepreneurship on MFT related products and services.

Marketing recommendations: These are: 9. Marketing Challenges, 10. Setting an overall MFT market goal to encourage growth in the MFT sector in OIC member states, 11. Capturing opportunities in the niche sub-segment within MFT, 12. Implementing and streamlining the basic MFT related services, 13. Targeting Muslim Minority Countries, 14. Developing healthcare services and facilities for the Muslim market

Technical recommendations: These are: 15. Standardization of Certification System. Increasing awareness of the MFT market among the travel industry stakeholders, 16. Developing Handbooks and Guide, 17. MF Airlines and Airports, 18. Staff Policy, 19. The Role of the Internet in Marketing MFT, 20. Developing MF Applications.

INTRODUCTION

Since a few years, tourism industry is showing a great interest in "Muslim Friendly Tourism" and recognizing its growing importance, from the perspectives of practitioners and researchers alike. All the actors involved in this process stress the fact that any strategy to develop or market MFT products and/or services should be guided by Islamic law (Shariah). Many factors could explain this new trend.

This study deals with the MFT branding on the global market. Thus, it would be very appropriate to start with the definition of MFT tourism along with its various components. It will also discuss the opportunities and challenges in developing and marketing Halal Tourism. Marketers and policy makers who are concerned with halal issues understand the Islamic requirements related to tourism. This will help them choose suitable halal alternatives.

Knowledge of MFT, its definition and components is pertinent to industry players in developing MFT infrastructure and facilities, halal travel packages, and MF activities. It will help them design specific messages for marketing communication in order to attract Muslim tourists.

What is Tourism?

According to UNWTO, "Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes" (Goeldner & Ritchie, 2006). Tourism is also defined as "the temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations, and the facilities created to cater to their needs" (Cook et al., 2014). Thus, the above definition that tourism includes the movement of people (tourists) which represents the demand side and activities/facilities to cater to tourists' needs (destination) which represent the supply side. The United Nations World Tourism Organization estimates by 2020 from the Middle East alone, about 70 million people will travel overseas on holiday, spending about $20 billion every year.

Other researchers have tried to define Islamic tourism and Halal tourism (Battour et al., 2014; Carboni, Perelli, & Sistu, 2014; Din, 1989; Jafari & Scott, 2014; Timothy & Iverson, 2006; Zamani-Farahani & Henderson, 2010). However, most have not taken into consideration the Islamic law (Shariah), the target customers (i.e. Muslims or non-Muslims), the location of activity (i.e. Muslim vs non-Muslim countries), the products and services offered (i.e. food, facilities), and the purpose of travel. Most of these definitions are loose and used interchangeably. In other words, Halal tourism, Islamic tourism, Muslim Friendly Tourism and Sharia compliant Tourism are considered as similar concepts. In this report, we will using almost exclusively the expression MFT.

What is Halal/Islamic/Muslim Friendly 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). Islamic tourism can be 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". This trend has created a market for Muslim-friendly tourist services. (Carboni et al., 2014).

There is a challenge to identify the right terminologies. According to some academics, the use of these terms as identical is questionable. However, since this report deals mainly with the branding of this type of tourism and since this subject has necessarily multidisciplinary aspects, we will escape this problematic and use the term MFT.

Carboni et al. (2014) defined Islamic tourism "as tourism in accordance with Islam, involving people of the Muslim faith who are interested in keeping with their personal religious habits whilst travelling". Islamic tourism is not restricted only for religious purposes and is not exclusively to or within Muslim countries. It refers to tourism mainly by Muslims who prefer to stay within their culture. This definition highlights the fact that Islamic tourism is for Muslims and the location of the activities is in a Muslim country. MFT is a type of religious tourism that is in conformity with Islamic teachings regarding behaviors, dress, conduct and diet.

To sum up, MFT is "any tourism object or action which is permissible according to Islamic teachings to use or engage by Muslims in tourism industry". The definition considers the Islamic law (shariah) as the basis to deliver tourism products and services to the target customers who are mainly Muslims, such as Halal hotels (shariah compliant hotels), Halal Resorts, Halal restaurants, and Halal trips. The definition claims that the location of activity is not limited to the Muslim world. Therefore it includes services and products that are designed for Muslim travelers in Muslim and non-Muslim countries. The demand for halal resorts, hotels or transportation reveals the reluctance of religious conservative families and individuals to travel in liberal or Western style locations and the condemnation of travel behaviors regarded as un-Islamic.

The context Multiculturalism versus Social and Political Threats: Islamophobia

The growing interest in Halal tourism could be due partly to the growth of Muslim population worldwide. The reference to multiculturalism is very important to consider in this context. A multiculturalist approach is necessary for the understanding of the current practice and future of halal tourism. The sociology of tourism, especially in relation to aspects of origin ethnicity, nationality, citizenship, culture and religion can teach us a lot about the principles and practices of Islamic hotels, and highlights the various ways in which Islam intersects the hotel industry sector. In particular, these new opportunities for the development of Islamic hospitality in the West are challenged by the social difficulties that relate to Islamophobia.

Islam prescribes a system of mutual fraternal hospitality, promotes affinity, cultural curiosity and sympathy. Nevertheless, it also requires certain attributes and services based on religion values and adhesion to moral, procedures and conduct. Since the spread of terrorist threats, the perception of the Muslim community has become more vulnerable to public scrutiny, suspicion and discrimination (Stephenson, 2014). Islamophobia can affect social relationships and interactions, which represents a challenge for cosmopolitan and multicultural exchange experiences. (Stephenson, 2014). However, in spite of this current climate of Islamophobia, researchers do predict a great success for the future of Islamic tourism industry. (Stephenson, 2014).

The Muslim world and tourism. Globalization and Intercultural relations.

There is a great diversity of nations in the Muslim World, due to a historical process of cultural hybridization. There are57member states in the Organization of Islamic Cooperation, OIC. The different nationalities, countries and continents can hardly be covered as a particular segment within the tourism sector. Homogenization is almost impossible, the niche market is so broad, and requirements are very diverse, based on personal choice and level of involvement with religious guidelines set by Islam. However, there is a great hope for the future, since traditional cultures transform due to globalization. The world is experiencing a" moment of cultural relocation" (Betancourt, 2000). In this regard, tourism could become one of the ways to bring higher knowledge of places, and to build bridges between different cultural identities. Beyond its own mechanisms of regeneration, tourism will allow the rediscovery of hospitality, not in its current and trivialized form, but in a new form of freedom and respect for diversity (Perelli in Onghena, 2003).

Structure of the present Study.

In Part I of this study, we will provide a literature review, while conceptualizing FMT. In Part II, the current situation of MFT will be examined, using the available data and statistics. Part III will deal with the standards of MFT and certification processes. In Part IV, four MFT destinations chosen from OIC member states will be analyzed. While in Part V, we will address another four MFT destinations from non-OIC member states. Finally, in Part VI, the findings will be used to make general conclusions and specific recommendations for a better implementation of MFT in OIC countries.

PART I

THE MUSLIM FRIENDLY TOURISM (MFT) CONCEPT: A LITERATURE REVIEW

Our aim here is to conceptualize MFT in depth and to expose all its aspects and components. MFT role in hospitality will also be addressed and include examples of current and future plans for Islamic-friendly hospitality services.

1. The New Trend: The Demand for Halal Products

There is a current growing demand for halal products, due to changes in the social and economic conditions of predominantly Muslim nations and to an increase in migration, tourism and trade from these countries. We have been witnessing a 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).

Studies found that most Muslims had a positive attitude towards halal and would purchase halal if offered the chance. However, this positive attitude towards halal would not affect their purchase intentions. Muslims seek high involvement with products they purchase to ensure conformity with their beliefs (Henderson, 2010), and tend to take measures to ensure these products are compliant with their faith (Marranci, 2012).

Thus, a halal market does exist (Abdul et al., 2009), and 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", fulfilling such brands as "Islamic branding", and is proving popular and attracting the interests of marketing professionals and scholars alike (Wilson and Liu, 2011).

2. Islamic Marketing and Islamic Branding

Islamic branding is "a product or service that is the Sharia-compliant. Any parties involved in Halal accreditations should seriously implement strict procedures in getting the Halal logo" (Yusof and Jusoh, 2014). The notion of halal has expanded beyond food (Wilson and Liu, 2011), including products such as cosmetics, clothing, entertainment, airlines, etc. Halal has also found a favoring in the services industry. Many banking institutions are providing halal financial services to Muslim customers. Thanks to this increased awareness and affluence, some marketing professionals are now rethinking their marketing and product development strategies to better suit Muslim consumer (Bon and Hussain, 2010).

The concept of Islamic marketing is relatively new. Muslims have been trading for centuries. Historically, they have met with different peoples and have adapted their approach into an Islamic context to match the local cultures in order to market their goods and services (Wilson and Grant, 2013). Thus, 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). The halal market covers a wide range of goods and services. Muslims have special dietary guidelines. 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), especially in Europe (Bonne et al., 2007), (Lever and Miele, 2012; Stephenson, 2014).

3. **Halal in Hospitality**

Adapting to religious needs, Islamic hospitality has also developed over the past decades and has become an important part of the hospitality and foodservice industry with several recognized features (Stephenson, 2014). 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 the city of Mecca (Jafari and Scott, 2014). However, the Quran also encourages Muslim to undergo travel for non-religious purposes. Muslims are encouraged to travel in order to marvel at God's creation (Quran: 29:20) and also to witness what has happened to previous people who have incurred God's wrath (Jafari and Scott, 2014) (Quran: 6:11) In addition, many other significant motivations and factors encourage Muslims to visit foreign countries as well as to travel domestically(Bon and Hussain, 2010).

Regional travel by Muslims within predominantly Islamic regions is also important, for example tourism within the Arab world. Lebanon and until recent years Syria were among the leading destinations for Saudi Arabian tourists, (Ladki et al., 2002). But, for very obvious reasons, there has been an important shift in the preferences towards these destinations. Other destinations in predominantly Muslim countries have become favorite amongst Muslim travelers. Turkey is maybe the best example. In response to this rise in demand, many tourist destinations in Turkey are providing MF facilities, such as hotels and gender segregated beaches (Girit, 2014). From an extensive literature review, it has been possible to identify the following aspects as essential to MFT.

a. Accommodation: The number of attributes and amenities an accommodation provider offers are assessed by consumers when choosing a lodging. Essential accommodation attributes are divided into two main categories: those involving the accommodation's ambience and room comfort, and the others relating to employee attitudes and behavior (Atkinson, 1988). Consumers rank accommodation attributes according to their relative importance. Given that the service industry is intangible, consumers rely on tangible cues, such as amenities to assess the service quality (Gayatri and Chew, 2013). High service quality will result in customer satisfaction, which results in customer loyalty and positive word of mouth (Wong, 2004). Some MF attributes include:

- Meeting the religious needs, e.g. the provision of prayer mats in rooms; an indication of the Qibla (prayer direction);
- 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 to perform prayers, especially Friday prayers;

- Availability of halal food, e.g. the provision of halal meal choices by the hotel restaurants and in-room dining;
- Banning of alcohol consumption, gambling, including the removal of alcoholic beverages from the room in which a tourist is staying, and of sexual permissiveness, e.g. removing any pornographic material and any sexually suggestive programming options from being broadcast in the room or the proximity of the hotel; and
- Staff dress code, e.g. guaranteeing conservative dress by hotel staff.

b. Design: To improve the religious-friendliness of hotels, researchers suggest this could be done for Muslim tourists 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 (Stephenson, 2014). Some items should also be removed, such as decorations that are objectionable (containing nude figures, for example) or picturing animals. Halal toiletries should also be offered in rooms.

c. Worship Facilities: They are related mainly to having a clean space for prayer is an essential facility within the hotel premises, dedicated for prayer and Friday prayers (Battour et al., 2011).

d. Halal Food: Muslim travelers require halal food at the chosen destination. 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. 75% of Muslims choose to consume halal food when travelling due not only to religious guidelines but also to the perception that halal food is healthier, cleaner, and tastier(Lada et al. (2009). The availability of halal food is a decisive 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. Preference for halal food means that people favor buying a low quality product with a halal certificate to a high product that is not halal-certified (Prayag and Hosany (2014). The provision of halal food by hoteliers serves as a competitive advantage (Stephenson, 2014). The financial benefits of supplying halal food are important.

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 Muslim tourists that their product is genuinely halal by communicating about the food preparation (Bon and Hussain, 2010). Accommodation providers can also communicate the availability of halal food to potential guests.

e. Banning of Alcohol, Gambling and Sexual Permissiveness: Muslims are forbidden from the consumption of alcohol and gambling. It is therefore important for accommodation providers to make arrangements to limit contact of Muslim travelers with alcohol and gambling (Stephenson, 2014; Hashim et al., 2007). Alcohol can be removed from the in-room mini fridge, and labels can be introduced to notify the guests about food items that contain alcohol.

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 like to avoid exposing their children to situations where inappropriate actions are taking place (Battour et al., 2011). 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 broadcast in the accommodation 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 avoid those establishments (Battour et al., 2011), as many families may want to prevent their children from exposure to what they regard as inappropriate activities

f. Health and Recreational Facilities: The availability of health and fitness facilities at a lodging is an influential factor in the accommodation selection process. Muslim travelers require that the available gymnasiums be gender segregated (Battour et al., 2011; Stephenson, 2014). The availability of a swimming pool on premises also plays apart in the accommodation selection process (Jones and Chen, 2011). 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 time slots where one gender will exclusively use the pool later (Battour et al., 2011). Muslims also see favorably the presence of health facilities where a guest can get a beauty treatment onsite.

g. 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 Gender segregation allows female Muslim guests to enjoy their stay at a lodging in relative safety (Abdul Majid et al., 2015). Lodgings dedicate entire floors solely for the use of a single gender serviced by only staff of that gender (Stephenson, 2014; Samori and Sabtu, 2014), is 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 (Stephenson, 2014). It is also recommended that beachside hotels include a female only area (Battour et al., 2011; Stephenson, 2014). It has been suggested also that entertainment premises have separate queues for gender. Another example is having female only taxi drivers (Battour et al., 2014). Muslim Travelers evaluate a destination's Islamic attributes including gender segregation (Shafaei and Mohamed, 2015).

h. Price: Consumers use price to compare accommodation providers and make a choice (Hecht and Martin, 2006). Some hotel guests might be willing to pay more in order to have access to certain attributes. The provision of religious accommodation attributes might influence the room rates (Weidenfeld, 2006). When it comes to halal food, consumers express their willingness to pay a higher price for halal foods, many considering halal more important than price. (Mohayidin and Kamarulzaman (2014)

i. Dress code of staff: Muslim guests pay special attention to the destination dress code and take the accommodation providers' staff's dress code into consideration. Muslim travelers prefer the staff to abide by a conservative dress code (Saad et al., 2014). For accommodation providers, marketing efforts need to include Muslim-friendly images and messages to make their establishment more appealing. For example, Malaysian companies utilize wholesome messages and images of women dressed in traditional and modest attire in their promotional material directed at potential guests from Muslim nations.

j. Location: Location is another important asset. The close proximity to facilities is a competitive advantage. A convenient hotel location is the most influential factor for repeat visitors. Location also plays a role in Muslim visitors' accommodation selection (Chan and Wong 2006). Muslim tourists are more likely to choose a hotel within close proximity to a mosque or an Islamic center to have the ability to perform prayers. They would be most likely to avoid hotels that are within close proximity to red light districts and clubs. TO and guides should 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 (Battour et al., 2011).

k. Cleanliness: Cleanliness is another crucial factor in the accommodation selection process (Mohsin, 2007; Lockyer, 2003). Cleanliness influences customer satisfaction. As Muslims require clean bathrooms to perform ablutions, prepare for prayer and read the Quran, the cleanliness of the toilet and bathroom are the most important, followed by the cleanliness of the room as a whole(Lockyer, 2003).

l. Personnel and Service Encounter: Another crucial accommodation provider attribute is personnel. Employee behavior is a key influencer of service quality. The interaction between a guest and an employee is called a service encounter. Service quality is the attitude developed by the host, because of a service encounter. The service on offer is inseparable from the employee and thus how an employee interacts with guests has an important impact of the quality of the service delivered. 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 customers. Service providers can create a sustainable competitive advantage by manipulating employee's behavior in order to provide exceptional service delivery system (Wong, 2004). Service providers can also educate their staff in other cultural norms (Stauss and Mang, 1999).

m. Intercultural Service Encounters: It is essential for service providers to become aware of the cultural backgrounds of their clients and be able to respond accordingly. Culture plays a vital role when evaluating the quality of service received (Kong and Jogaratnam, 2007). A service encounter is called inter-cultural when the customer and the service provider are from two differing cultures. If not managed correctly, inter-cultural service encounters could have negative outcomes (Stauss and Mang, 1999). It is therefore recommended for the service provider to identify the cultural inconsistencies and educate contact employees of the correct mannerism of interaction with tourists. Service employees' behavior is more flexible and better to adjust than other 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 (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 Muslim customers must refrain from food and drink from sunrise to sunset and should not make any suggestions for meal options. Accommodation providers can also hire some Muslims who will interact appropriately with the Muslim guests (Saad et al., 2014).

n. Certification: Consumers rely on certification as a cue for decision-making. Certification appears important for Muslim consumers and rating systems are currently being created and implemented to rate the accommodation providers' halal degree of compliance, such as the CrescentRating system. The certification is an important issue when Muslim consumers choose their products, as it is the leading signifier of compliance to the religious demands (Rarick et al., 2012). 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). Halal-certified products are perceived as clean and trustworthy. 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 available there. However, there are problems with certification. See Part III on Certification Processes.

o. Rating: The star rating an establishment is awarded is based on the attributes and services offered (Román and Martín, 2016). An establishment's star rating is significant as it is used by potential lodgers to collect information and to make judgements about an accommodation (Rhee and Yang, 2015; Gu and Ryan, 2008), and to form expectations about the attributes available at a lodging (Rhee 32 and Yang 2015), such as cleanliness (Lockyer, 2003).

Online reviews are popular amongst travelers nowadays. Online reviews are useful as they inform other consumers about a product from the point of view of a user and provide recommendations about the product (Zhang et al., 2011). People turn to online reviews of products as they are perceived as more reliable than the opinions of experts (Williams et al., 2010; Barreda and Bilgihan, 2013).

4. Current practice in Halal tourism

In some countries, several Tourism Industry operators are organizing seminars to train their staff to satisfy Muslim tourist needs. Therefore, some non-Muslim destinations such as Japan, Philippines, and Brazil offer MF solutions/options to questions seen as problematic by Muslim travelers. Recently, some practices related to MFT have been observed. These practices, which are applied in some destinations, could be used as a benchmark for other destinations to target Muslim tourists and/or to market the destination as 'Muslim friendly destination'.

From the previous practices, it is noted that availability of MF hotels is considered one of the most important attributes that attract Muslim travelers and encourage them to visit the destination. The availability of Halal food and beverages is vital for destinations that target Muslim travelers.

According to Euromonitor International report (2015), Halal food market will grow in non-Muslim destinations due to the growth of MFT. For example, global Muslim expenditure on Food and Beverages (F&B) has increased by 10.8% to reach $1,292 billion in 2013. This expenditure is expected to increase to a $2,537 billion by 2019 and will account for 21.2% of the global expenditure. Furthermore, Middle Eastern full-service and fast food restaurants, which serve Halal food for Muslim tourists, are very prevalent in France, Germany and the UK and some of their customers may be frequently non-Muslim. The availability of Halal food in the destination allows Muslim tourists to experience famous cuisine in accordance with their beliefs and will motivate them to visit the destination.

A new travel package in the tourism industry that provides full holiday services in accordance with Islamic beliefs and practices is called ‘Halal Holiday’ (halal Booking, 2015; Khalil, 2010; the guardian, 2010). These include Halal resorts and hotels serving only halal foods and non-alcoholic drinks. Other services offered may include separate pools, spa and leisure facilities for men and women, open separate or private beaches, private women female only beach, family oriented facilities such as mixed beach areas for families with Islamic swimming dress code, and Muslim prayer facilities. Some may even offer Islamic Heritage tours for tourists to explore and discover the history and culture of the Islamic civilization. Availability of MF holiday can increase the recognition of destination to be MF.

One of the recent trends in global halal market is Muslims friendly cruise. The first MF cruise was launched by the Antalya based Fusion Tour Company in Turkey. It sails to Greece without alcohol, pork-related products and gambling on board. It also includes segregated sports centers, single-sex spa facilities, separate Turkish baths and prayer rooms (Salama, 2015).

Conclusion:

The major components of MFT are similar to those of conventional tourism like hotels, restaurants, logistics, finance, and travel packages. Evaluation of the value of MF products in case of MFT, however, entails a completely different process due to the requirements of Islam. It covers all tourism related goods and services that are designed, produced and presented to the market according to the Islamic rules (Hamza et al., 2012). Muslim tourists usually travel with family members and therefore, this concept is tailored around the travel needs of Muslim tourists who predominately seek a family friendly environment (DinarStandard, 2015). All destinations that provide services and facilities that cater to at least some of the faith-based needs of Muslim visitors are categorized as 'MF Destinations' (CrescentRating, 2015).

PART II

THE CURRENT SITUATION OF MFT.
DATA AND STATISTICS

According to the State of the Global Islamic Economy report (Reuters, 2015), produced by Thomson Reuters in collaboration with Dinar Standard, the global Muslim travel market was worth billion U$140 in 2013, which represents 11.5% of global expenditure. The same report predicts that the segment is expected to be worth billion U$238 in 2019 and represent 13% of global expenditure. The tourism industry is increasingly competitive. In this section of our study, we will give some important data and statistics about the current situation of MFT. We will be using mainly the data gathered and provided by SESRIC, Crescent Rating and Dinar Standard.(See Bibliography)

1. The Current Situation of OIC Member Countries in MFT

In the year 2014, the travel sector represented by Muslim travelers was worth $121 billion. The total number of Muslim visitor arrivals amounted to 116 million, thus representing 10.2 % of the global visitor arrivals. Moreover, tourism experts are expecting the number of Muslim visitors to increase and reach about 180 million by 2020. The Muslim tourism sector will then constitute 11.4% of the global market with an expenditure projected to be $212 billion. Table 1 shows Muslim visitor arrivals and expenditures for the years 2000 and 2014, and the growth forecast for 2020.

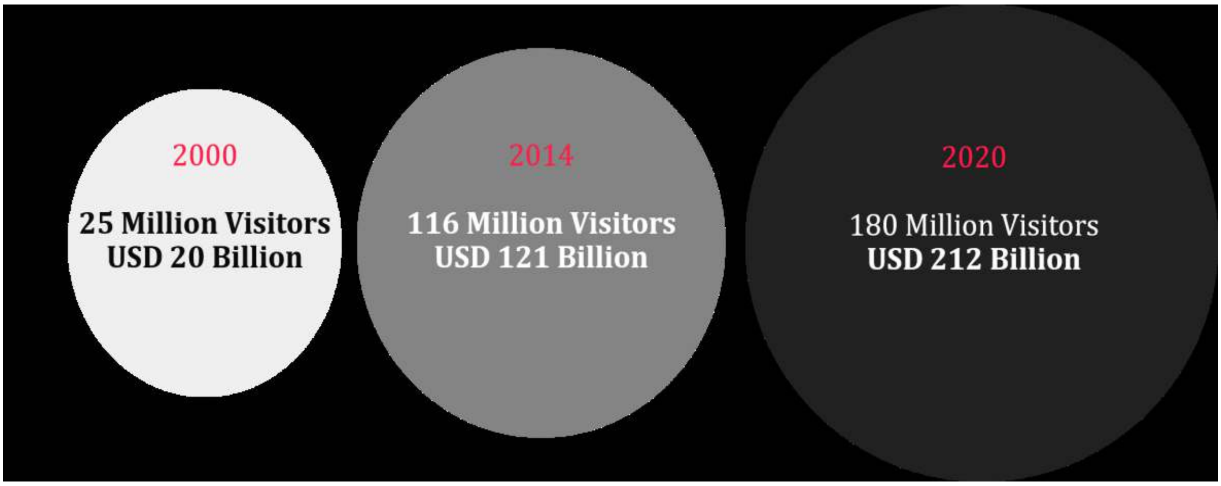
Table 1: Muslim Visitor Arrivals (2010 – 2020)

	Year 2010	Year 2014	Year 2020	Growth Forecast (2015-2020)
Total Muslim Visitor Arrivals (Millions)	98	116	180	54.50
Total Muslim Visitor Arrivals to OIC (Millions)	53	64	98	51.87
Total Muslim Visitor Arrivals (Millions)	45	52	82	57.75

Source: CrescentRating, 2015

These main data can be completed with the following figure.

Figure 1: Muslim visitor arrivals and expenditure, 2000 to 2020



Source: CrescentRating (2015); UNWTO Tourism Highlights (2015)

Total tourist arrivals are expected to increase in the OIC countries. By the year 2020, Muslim visitor arrivals would be about 98 million into the OIC member states and this represents a growth rate of 51.8% over the forecast period. Although most of the arrivals would be from OIC member states, travel by Muslims from non-OIC member states would have grown by 42.95% over the same period. This means there is an opportunity that could be explored by the OIC member states.

Total Muslim Visitor Arrivals to non-OIC member states growth over the forecast period will be 57.75%. Non-OIC member states are actively seeking to attract Muslim travelers. We know that countries like Singapore, the United Kingdom, Germany and France have traditionally attracted Muslim tourists. However, more recently countries like Japan, Korea and Australia have sought to attract Muslim travelers. Thus, the growing number of Muslim visitors from OIC countries to Non-OIC countries is expected to represent 76.38%. Table 2 follows.

Table 2: Muslim Visitor Arrivals (2010-2020)

	Year 2010	Year 2014	Year 2020E	Growth Forecast 2010-2020 (Percentage)
Total Muslim Visitor Arrivals (Millions)	98	116	180	54.5
From OIF to OIC (Millions)	42	51	79	54.1
From non OIC to OIC (Millions)	11	13	19	42.9
Total Muslim Visitor Arrivals to OIC (Millions)	53	64	98	51.8
% of Muslim Visitors to OIC	53.9%	55.3%	54.3%	
From OIC to non OIC (Millions)	21	22	40	76.3
From non OIC to non OIC (Millions)	24	30	42	43.6
Total Muslim Visitor Arrivals to non OIC (Millions)	45	52	82	57.7
% of Muslim Visitors to non OIC	46.1%	44.7%	45.7%	

Total Visitor Arrivals to OIC (Millions)	**169**	**190**	**249**	**31,1**
% of Muslim Arrivals	**31.1%**	**33.8%**	**39.1%**	

Table 3 lists the top 15 OIC destinations by Muslim visitor arrivals

Table 3: Muslim Visitor Arrivals to the top 15 OIC Member States for the period 2014

	Country Name	Muslim Visitor Arrivals (Inbound Tourist)	Muslim Visitor Arrivals Expenditure (Inbound Tourist)
1	Saudi Arabia	11.2	$ 7,718.1
2	Turkey	7.1	$ 6,606.9
3	United Arab Emirates	6.5	$ 7,734.2
4	Bahrain	5.9	$ 1,175.3
5	Malaysia	5.3	$ 4,290.9
6	Kazakhstan	4.3	$ 1,456.1
7	Iran, Islamic Republic	4.1	$ 942.5
8	Tunisia	3.0	$ 1,316.5
9	Jordan	2.0	$ 2,696.4
10	Egypt, Arab Republic	1.9	$ 1,470.4
11	Kyrgyz Republic	1.7	$ 293.9
12	Indonesia	1.2	$ 1,328.4
13	Morocco	0.8	$ 592.1
14	Algeria	0.6	$ 70.0
15	Albania	0.3	$ 139.1

Source: CrescentRating, 2015

We will not discuss the obvious case of Saudi Arabia. Most visitors to this country are performing religious tourism, Haj and Umra, the two forms of pilgrimage.

Turkey remains the largest tourist destination among the OIC member states. This might be explained by the increasing marketing activities from the Turkish Government, (Ministry of Culture and Tourism) and the offering of improved travel infrastructure (such as new airports, new hotel openings and improvements) and other travel services that have positively impacted the tourism sector.

It is interesting to note that Kazakhstan has had the fastest growth in inbound tourism. The determining factors of this success are a fast developing economy, greater government investments, and an improving business environment. All this resulted in a growing number of inbound tourists. Moreover, the government of Kazakhstan financially supports travel agencies' participation in international tourism fairs.

Muslim visitor arrivals continue to increase in the OIC member states. The overall key trend is that these top 15 destinations heavily dominate Muslim travel. Tourism in the OIC member states has a vast potential to develop as a sustainable industry. However, if we consider this very modest share of OIC member states in the global tourism market, we can conclude that the potential for the development of tourism has not yet been manifested and/ or exploited on a satisfactory level in many OIC countries, or in the OIC region as a whole. The following factors could help discuss the current trends of tourism in the OIC member states.

1. Competition; Asia-Pacific, and especially South East Asia, is strongly attracting

Muslim tourists. The governments in these countries have developed all kinds of means to help visitors access what they need, for example, Halal services.

2. Normally, Muslim tourists would travel to OIC countries since Muslim friendly facilities are available. However, with the increased competition on that level from non-OIC countries, the number of Muslim tourists traveling to these destinations is quickly growing.

3. African countries are in a particular situation, having been left outside this tourism growth. However, this setback may be only temporary.

2. OIC Regional Grouping Analysis

Here, we offer to analyze the OIC group through its three regional groups: the Arab Group, the Asian Group and the African Group. All the data presented here are for inbound tourism only. For the years 2010 and 2014, data are actual and for 2020,data are forecast.

Table 4: Inbound Tourist Arrival Data to Three Regional Groups of OIC Member States

Year (Inbound Tourism)	2010	2014	2020
OIC			
Inbound Muslim Arrivals (Millions)	52.82	64.32	97.69
Inbound Expenditure by Muslims (US$ M)	41,209	52,080	95,733
ARAB GROUP			
Inbound Muslim Arrivals (Millions)	34.46	38.70	52.48
Inbound Expenditure by Muslims (US$ M)	27,679	35,385	66,113
ASIAN GROUP			
Inbound Muslim Arrivals (Millions)	17.53	25.16	44.59
Inbound Expenditure by Muslims (US$ M)	13,099	16,321	28,990
AFRICAN GROUP			
Inbound Muslim Arrivals (Millions)	0.83	0.46	0.61
Inbound Expenditure by Muslims (US$ M)	430	372	629

Source: CrescentRating, 2015

By 2020, the Arab region would probably have the highest average inbound expenditure among OIC member states. Muslim Inbound tourist arrivals would be the largest for the Arab group. The Asian region will witness a strong growth in Muslim Arrivals, with a forecast growth rate of 41.7%. The African region will also witness strong inbound tourist arrivals over the same period. However, the growth would be relatively low, compared to the Asian and Arab groups.

Arab Region

The Arab region is expected to witness a strong growth in tourist arrivals over the forecast period. In 2014, the region received 38.7 million tourists. This could reach 52.5 million by 2020, which represents a growth rate of 23.9%. Table 5 shows the OIC Arab region visitor arrivals to the top five countries in 2014.

Table 5: OIC Arab Region Visitor Arrivals (Inbound Tourist) of top five Countries, 2014.

S/N	Country Name	Total Visitor Arrivals (Millions)	Muslim Visitor Arrivals(Millions)	Percentage of Muslim Visitor Arrivals
1	**United Arab Emirates**	**13.20**	**6.52**	**49.4%**
2	**Saudi Arabia**	**13.18**	**11.23**	**85.2%**
3	**Morocco**	**10.45**	**0.76**	**7.3%**
4	**Bahrain**	**9.27**	**5.86**	**63.2%**
5	**Egypt, Arab Republic**	**8.82**	**1.92**	**21.8%**

Source: Crescent Rating, 2015

What factors could explain this growth? Muslim visitor growth will be faster than the total visitor arrivals. In 2014, total tourist arrivals into the Arab region were 82.22 million and by 2020, this would have grown up to 96.83 million, which translates into an average yearly growth rate of only 1.2%. Hence, most of the travel to the Arab region will be from OIC member states. The percentage of Muslim tourist visitors in 2014 was 39.4% of total arrivals, and this would increase to 82.5%. Hotels and other attractions are focused towards catering to the needs of Muslim travelers. Shopping is a major activity of Muslim tourists, especially amongst the Arabs.

Asian Region

The Asian region is expected to witness strong tourist arrivals over the forecast period. In 2014, the leading country with tourist arrivals was Turkey followed by Malaysia and Indonesia. Table 6 shows the OIC Asian Region visitor arrivals to the top 5 countries in 2014.

Table 6: OIC Asian Region Visitor Arrivals (Inbound Tourist) of top 5 Countries, 2014.

S/N	Country Name	Total Visitor Arrivals (Millions)	Muslim Visitor Arrivals (Millions)	Percentage of Muslim Visitor Arrivals
1	**Turkey**	**39.28**	**7.12**	**18.1%**
2	**Malaysia**	**26.43**	**5.27**	**19.9%**
3	**Indonesia**	**9.33**	**1.16**	**12.4 %**
4	**Iran**	**5.48**	**4.13**	**75.4%**
5	**Kazakhstan**	**5.29**	**4.26**	**80.5%**

Source: Crescent Rating, 2015

Muslim visitor arrivals to the Asian region are expected to witness a strong increase in the next five years to reach 44.59 million by 2020. Arab tourists and Muslim intra-Asian travelers will represent the largest part of inbound tourism. In 2014, Muslim tourist arrivals were 25.16 million. This translates into a growth rate of 15.3%. Travel to Asia becomes very popular among Muslim tourists. Asian destinations are more affordable and provide high value for money (as compared to other places around the world). In 2014, total tourist arrivals in the Asian region was 100.25 million. By 2020, this would probably grow up to 140.49 million. This means an average yearly growth rate of 5.9%. Hence, most of the travel to the Asian region will be from Middle Eastern or Asian Muslim countries. The percentage of Muslim tourist visitors in 2014 was 24.5% of total arrivals, and it is expected to reach 41.5%.

African Region

The leading tourist destination in the African region is Mozambique. However, for many countries in this region, opportunities in the tourism sector still remain largely untapped. Travel warnings relating to Africa issued by several countries and other domestic factors have contributed to the low volume and slow growth of African tourism. Table 7 shows the OIC African region visitor arrivals to the top 5 countries in 2014. Most of the Muslim travel in Africa will be internal. Travel by Asian and Arab Muslims will be limited, at least in the next five years.

Table 7: OIC African Group Visitor Arrivals (Inbound Tourist) of top 5 Countries, 2014.

S/N	Country Name	Total Visitor Arrivals (Millions)	Muslim Visitor Arrivals (Millions)	Percentage of Muslim Visitor Arrivals
1	Mozambique	2.03	0.06	3.1%
2	Uganda	1.28	0.14	10.9%
3	Senegal	1.10	0.06	5.2 %
4	Cameroon	1.01	0.01	1.0%
5	Nigeria	0.53	0.08	15.1%

Source: Crescent Rating, 2015

3. Top Muslim Outbound Markets

Malaysia is the leader in the outbound travel market from the OIC member states. Popular destinations for Malaysian tourists remain the ASEAN nations. Indonesia follows next, with most travel to countries relatively close, like Malaysia, Singapore and Australia. However, Indonesians are more and more traveling to further destinations like Japan and South Korea. Turkey holds the third position in the outbound travel market within the OIC member states. In the past, most Turkish citizens would travel to neighboring countries. Recently, the trend is also traveling to Western Europe and North Africa. Table 8 shows the total visitor departure (outbound tourism) of the OIC member states for 2014.

Table 8: Total Visitor Departure (Outbound Tourist) of OIC Member States, 2014

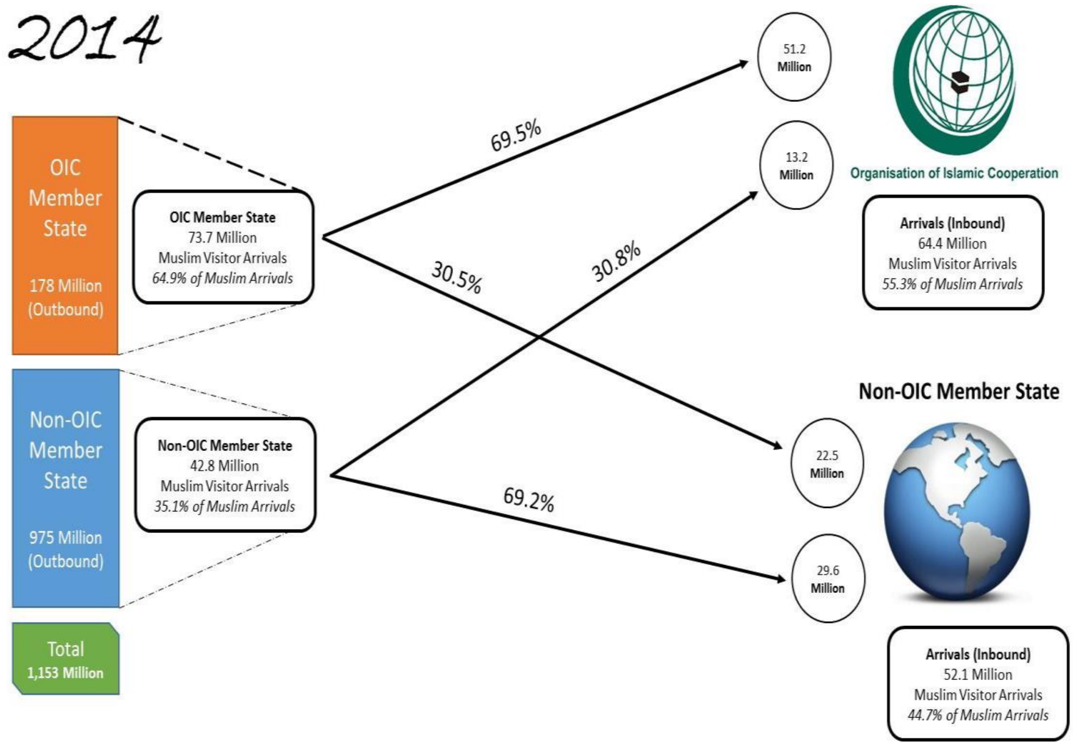
S/N	Country Name	Total Visitor Departure (Millions)	Muslim Visitor Departure (Millions)	Percentage of Muslim Visitor Departure (Outbound)
1	Malaysia	10.1	4.3	42.9%
2	Indonesia	9.8	6.1	61.7%
3	Turkey	7.5	7.5	99.8%
4	Uzbekistan	6.2	5.3	86.7%
5	Saudi Arabia	5.0	4.8	97.1%
6	Iraq	4.2	4.1	96.9%
7	Iran, Islamic Republic	3.8	3.7	99.7%
8	Azerbaijan	3.2	2.9	89.3%
9	Kazakhstan	3.1	1.9	63.2%
10	United Arab Emirates	3.0	2.3	77.0%
11	Kuwait	2.9	2.5	86.4%
12	Libya	2.8	2.7	95.6%
13	Pakistan	2.8	2.5	91.6%
14	Jordan	2.4	2.4	98.8%
15	Egypt, Arab Republic	2.1	2.0	94.7%

Source: CrescentRating, 2015

4. Intra OIC Tourism Market Overview

Although competition was relatively strong to attract Muslim tourists from the non-OIC member states, intra OIC tourism demonstrated a sustained growth. It is expected that Muslim intra-OIC tourist arrivals will grow by 21.8% from 2014 to 2020, in comparison to Muslims arrivals from non-OIC markets that will grow by 17.4%. This highlights the fact that more Muslims residing in OIC countries are traveling to other OIC countries. It also means that non-OIC Muslim market could be a target segment for OIC countries seeking to increase visitor arrivals.Figure 2 is a representation of Muslim arrivals to both OIC and non-OIC member states.

Figure 2: Muslim Arrivals to OIC and Non-OIC member states, 2014.



Source: CrescentRating, 2015

PART III

STANDARDS AND CERTIFICATION OF MFT

1. The Standards of MFT

Research carried out by Dinar Standard showed that Muslims travelers spent $137 billion on tourism in 2012. It is expecting to reach $181 billion by 2020. This figure is not including the pilgrimage to Saudi Arabia. In general, travelers' requirements depend on their culture and lifestyle. However, the notions of halal and haram (licit and illicit, or permissible and non-permissible) remain constant regardless of any other considerations (like nationality for instance). The main need is adhering to a halal diet. This means eating only meat that has been slaughtered in the halal way. Any derivatives of pig are not permissible. A halal diet also means not consuming alcohol.

'Halal hotels' can also be classified or qualified as halal if their space is organized to include things like prayer facilities, separate swimming pools and/or beach areas for men and women, among other requirements. Halal tourism also encompasses airlines that do not serve alcoholic beverages and offer food with halal certificates. It concerns also cosmetics, clothing, pharmaceuticals and financial services. It means a generally MF environment.

Research has also shown that Muslim travelers from the GCC countries may be more attracted by shopping, whereas Muslims from other countries may be more interested in sightseeing. Actors in the travel and tourism industry have recognized the increase in Muslim travelers. In order to respond to this trend, they need to learn how to deal with it and to market to these specific needs and to gain Muslim travelers as customers. This may be an important factor of competition (Case of Thailand, for instance). As we shall see in the fourth part of this study dedicated to chosen case studies, more and more countries are now catering to Muslim travelers' needs. For example, Japan has relaxed visa requirements for travelers from Malaysia and Indonesia. Japan has also organized the Japan Halal Expo in November 2014 to see how it could improve addressing the needs of its Muslim visitors.

Like in any other business, the best strategy to increase the client base begins with obtaining halal certification. In many Muslim and non-Muslim countries, some specific organizations are working hard, with different partners, to create a uniformed "halal certification system".

To stress the growing importance of MFT, let us mention the following example. The Muslim Travel Index launched by McCann Reach showed that, out of the £21 billion spent by tourists in the UK in 2013, the biggest spenders were Muslims from the Middle East. Although these countries are not among the top 15 visitors to the UK (as far as numbers are concerned), their tourists spent a daily average of £179 per person, amounting to £1.1billion for that year in the UK alone.

Some online booking systems like Halalbooking.com and Halaltrips.com that are at the forefront in the activity of booking MF holidays. There are organizations like Crescent Rating who advise businesses on how to market and connect to Muslim travelers. The Shaza Hotels Chain is building luxury 5* hotels that serve halal food and no alcohol, have separate swimming facilities and prayer rooms and provide many other services.

In terms of destinations, Malaysia remains at the forefront of MFT with an important offer of halal hotels and restaurants as well as mosques, cultural festivals, shopping and beaches. Malaysia is also enjoying two key factors. Its political stability and its natural beauty that play a big role in attracting Muslim tourists. We can also mention many other examples like Spain, Turkey, etc. (See Bibliography).

Travelling has become easier and affordable for all sections of society. Moreover, Muslims from the 57 OIC member states and Muslims in minority Muslim countries make up a young and important demographic group. Key Muslim majority countries like Malaysia, Indonesia and Turkey have constantly growing economies. With a global population of 1.8 billion Muslims, the market is huge and so is the potential for businesses to take advantage of it.

An Example of Halal Tourism Standards: The Muslim Friendly Hospitality Services Standard of Malaysia.

The Muslim Friendly Hospitality Services (MFHS) standard is Malaysia's first standard dedicated to MFT sector. It was initiated in 2012 and led by INHART) of IIUM.It is the result of the efforts of a large combination of organizations: ITC, MAHO, MAH, MATTA, BUMITRA and MTGC. The document was released in August 2014, and in January 2015, the standard was officially published, providing guidelines on three critical component: the accommodation premises, tour packages and tourist guides. The adoption of the standard is however solely on voluntary basis.

2. Halal Certification Practices

About Halal Certification

Halal Certification is a recognition that the products are permissible under Islamic law. These products are thus edible, drinkable or usable by Muslims. It helps to build consumer's confidence without suspicion or doubt over the consumption of products or services. It is an authoritative and reliable testimony to support Halal requirements. It is estimated that 70% of 1.6 billion Muslims worldwide follow Halal food standards, and that the global Halal market is currently estimated at USD $600 billion. Today, Halal trademark is an important marketing tool in the international arena. Literature on halal markets procedure focuses mainly on global halal food. Although, halal encompasses three major categories:

- Abattoir or slaughtering of animals,
- Manufactured processed products Including food products, ingredients for food products, food snacks, sea food and dairy products and non-food products such as cosmetics, pharmaceuticals and other consumables, and
- Food premises**:** Restaurants, hotels, canteens, hostels, food chains, catering companies, airlines, railway, hospitals, etc.

How to obtain an Authentic Halal Certificate

Some Islamic halal certificate organizations provide both food quality and halal requirements. That is why most of the global halal markets are looking for these organizations to get certificates. Halal certification organizations want assurances for consumers that the products must be free from (1) a part of animal prohibited in sharia (2) impure things according to the Islamic law (3) should not be prepared and manufactured with impure instruments. (4) No close proximity with any impure and haram materials. Standard norms for product manufacturer and for food premises can be found in specialized literature (See Bibliography). Here, we will give a special attention to the standard norms at hotel outlets:

- The inspection and certification process must be carried out in the hotel kitchen only.
- The availability of two (2) full times Muslim cooks working in the kitchen.
- All cutleries must be for Halal only
- Only halal product are prepared in the Halal kitchen.
- Any non-halal, suspicious ingredients or raw materials are not used for all kind of dishes like Western and Chinese food;
- Kitchen for Halal food is separated from the non-Halal kitchen and they are not accessible to each other.
- Same Staff are not allowed to enter both Halal and non-Halal kitchen.
- Wine and any item of the same kind are strictly prohibited in the Halal kitchen.

From2005 onwards, the MF trend hotels has spilled over, with a number of hotels positioning themselves as MF-oriented hotels. They do not serve alcohol drink and non-Halal food. They provide facilities, support services and food which meet Islamic requirements. The Islamic concepts have received good response not only from the Muslim guests, but also from the hotel clients coming from Europe, Germany, and Australia as well. The demand of Halal food and MF hotel has led some countries, like Malaysia, to believe that they can become attractive destinations for Muslim and non-Muslim travelers alike.

Hence, it is necessary for hotels to take a holistic approach in serving Muslim needs.. Halal certification can be used as a marketing tool in promoting the Halal brand/products or services (Rajagopal, Ramanan, Visvanathan and Satapathy (2011)). Hotels with Halal certification in their kitchen and premises can give an added competitiveness advantage to the hotels in attracting not only foreign but also local tourists (Zailani, Omar and Kepong (2011).

In Malaysia, Halal certification is granted by the Department of Islamic Development Malaysia (JAKIM) and other government agencies such as State Islamic Religious Department (JAIN) and State Islamic Religious Council (MAIN). Halal certification processes can be the benchmarking tool for other hotels, organizations or industries to pursue for Halal certification.

JAKIM has listed four benefits of Halal certification;

- Consumers confidence: allowing them to make an informed choice of their purchases;

- Competitive advantage the manufacturers can use as a marketing tool;
- Quality aspect indicating that the products is not only fulfilling Halal requirements, but also following strict hygiene practices;
- Providing an authority to be used as a mechanism to audit and monitor Halal products.

In the sector of tourism, Halal certification practices refer to the hotel initiative/activities and behaviors towards managing the Halal certification and ensuring that these practices are used in achieving the Halal certification for the hotel. These practices would include Halal documentation, management responsibility, raw material, location, exterior area, premise, facilities, tool and equipment, staff characteristic, staff policy, pest control and waste management.

a. Halal Documentation Practices: Halal documentation is all the documents explaining the manufacturing processes and procedures, such as HACCP and GMP, name/s and address of manufacturer/s or supplier/s of ingredients, the products to be certified and regions in which the products will be sold/marketed, along with specific information about the component ingredients(Noordin, Noor, Hashim, & Samicho, 2009,JAKIM, 2012; Rahman, 2008). The term Halal documentation refers to the activities and behaviors of hotel in providing the Halal documents containing information such as company's profile, registration of company, documents control, standards operating procedures and processing, administration system, and training program.

b. Management Responsibility Practices: Management responsibility refers to the activities and behaviors of hotel management in establishing the committee, which consists of Muslim personnel who are responsible to ensure the effectiveness inimplementation of internal Halal control system (Halal Industry Development Corporation, 2008). The company shall appoint Muslim Halal executive officer to handle and ensure Halal procedures are applied. The management shall also ensure that they are trained on the Halal principles and their application. The owner of Halal certificate is required to train staff and understand the Halal Certification Manual Procedure and is required to attend training on Halal certification. Finally, the management shall ensure that sufficient resources (i.e. work force, facility, financial and infrastructure) are provided in order to implement the Halal control system.

c. Raw Material Practices: Raw material is a basic substance in its natural, modified or semi-processed state that has been used for manufacturers as an input to a production process for subsequent modification or transformation into finished products (Kolovoes, 2006). Processing of Halal food refers to the source of Halal food and drink. The content of raw materials, processed materials or additives must be Halal. The hotel needs to provide the food ingredients and additives that should be Halal. Suppliers or sub-contractors, which supply these materials, should have Halal certification. List of these materials should be identified as the same declared in the application form.

d. Location Practices: The location may affect innovation activities, production process, and efficiency(Cooke, Heidenreich and Braczyk, 2004). The premises/hotels have to be isolated from pig farm and waste disposal area to prevent cross contamination through personnel and equipment (HDC, 2008).

e. Exterior Area Practices: Exterior area or operating environment refers to conditions, entities, events, and factors surrounding an organization that influence its activities and choices, and determine its opportunities and risks. It refers also to the activities and behaviors of hotel in providing the areas and surrounding that should be clean and comply with Good Manufacturing Practices (GMP) (HDC, 2008).

f. Premise Practices: The term premise refers to the activities and behaviors of hotel in providing the building or any other structure (such as floor, drainage system, walls, ceiling, doors, window, changing/locker room, lighting system, ventilation and others) with a good condition, clean and suitable for the Halal operations. Premise shall be designed and constructed or renovated to enable the process flow to control the risk of product contamination and suitable for intended use. Layout of premises shall permit proper process flow, proper employee flow good hygiene and safety practices, including protection against pest infestation and cross-contamination between and during operations. Premises also should be kept in good repair and condition to prevent pest access and to eliminate potential breeding sites (HDC, 2008).

g. Facilities Practices: Facilities include the water supply, storage, freezing room, sinks, toilets and transportation means that should be sanitized, cleaned, and not mixed with other non-Halal materials. For example, transportation vehicles shall be only dedicated, appropriate to the type of the Halal food, and satisfy hygiene and sanitation conditions. (HDC, 2008).

h. Tool and Equipment Practices: Tool and equipment is defined as a method of use and refers to the activities and behaviors of hotel in providing the devices, utensils, machines and processing aids that should be clean and free from najas (impurity) or hazardous to health. It means that tools and equipment used for processing Halal food shall not be made of or contain any materials that are decreased as najas by Islamic law and shall be used only for Halal food.

i. Staff Characteristics and Policy Practices: An organization's effectiveness depends on the knowledge and skill of staff who develop and deliver services. (HDC, 2008). All workers are required to have certain vaccinations and shall practice health care and personal hygiene, especially those who work as the production operators. Open wound and ill staff that could affect the product quality should not be allowed working until recovering. Permanent staff, temporary staff, management staff, visitors and others shall wear special clothing according to the general health care procedures and personal hygiene procedures: proper clothing, hair and mouth cover, gloves and suitable shoes. The company also should assign staff at checkpoint for Halal quality and purchase of Halal raw ingredients. Every staff is encouraged to undergo Food Handlers training and should adhere to safety and cleanliness measures.

j. Pest Control Practices: Pest control refers to the activities and behaviors in keeping hotel premises in good condition to prevent pest access and to eliminate potential breeding sites. Pest control is an application and sometimes monitoring of a variety of chemicals used to kill insects and rodents, because they are detrimental to a person's health, the ecology or the economy (Kromp, 1999).

k. Waste Management Practices: Waste management is now one of the most important environmental issues in developing countries around the world (Begum & Jacqualine, 2008). It is crucial in reducing the organization's impact upon the environment (Ackerman, 2000). It refers to the activities and behaviors of the hotel in managing the waste and waste disposal area at the premises to achieve efficient cost savings and a better financial return for hotel performance.

3. The Effects of Halal Certification on Hotel Performance

Halal certification process is creating organizational competitive advantage and has a positive effect on six dimensions of performance, which are: personnel qualification, employee motivation, employee multi-skillfulness, efficiency, environmentally conscious and cost saving. (Razalli, Abdullah and Yusoff (2012). It has been argued that, in order to achieve green performance, a well-established Halal certification practice is required for the hotel. (Razalli et al. (2012). Halal certification is perceived to have an impact on customer trust and return visits. To be effective, Halal certification practices must be aligned with organizational objectives. (Marzuki, Hall, and William (2012).A framework of Halal certification practices has been proposed and tested the above-mentioned key variables that determine the success of the Halal certification process. All those variables are viewed in terms of practices, which mean they are perceptual measures on the activities and behaviors of the hotel (management and staff). However, only two variables were positively and significantly related to the hotel performance.

First: facilities and hotel performance were found to have significant relationship. In this case, facilities at the premise such as water supply, storage, shelves, freezing room, chemical materials, sinks, toilets and others would enhance the hotel performance. Furthermore, activities in the hotel should be coordinated and all functions in the hotel especially in the kitchen need to comply with the Halal certification. Second: staff policy, was found to have significant relationship with hotel performance (Collis and Montgomery (1995), Likert (1961), Salamon (2000), Cascio (1992). Therefore, to improve performance of Halal certificated hotels, the staff should be trained adequately in understanding Halal hygiene and practices.

The other variables of Halal certification practices such as Halal documentation, management responsibility, raw material, location, exterior area, premise, tool and equipment, staff characteristic, pest control and waste management are not significantly related to hotel performance. In other word, any improvements made by hotel on these variables may not give influential impact on the hotel performance (Noordin et al. (2009), Cooke et al. (2004), Kromp (1999) and Ackerman (2000). Let us not forget finally, that these standards need to be continuously improved by practitioners in the sector of Halal tourism.

4. Dealing with the downsides of Certification

The main downsides of certification are price, consistency, and implementation.

a. Price: Often in order to achieve certification an establishment has to comply with strict guidelines. 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.

b. 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. 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.

c. Implementation: It is another downside associated with certification. Ensuring that establishments are following guidelines 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. They cite the example of Klang Valley in Malaysia where there have been many cases of products falsely labelled as halal created a degree of mistrust and apprehension amongst the consumers.

PART IV

MFT DESTINATIONS.
CASE STUDIES FROM OIC MEMBER STATES

Both predominantly Muslim and Non-Muslim countries have embraced the idea of catering to this growing tourist market by providing goods and services. These range from providing more halal food options in menus, to providing halal friendly accommodation (Henderson, 2010; Weidenfeld and Ron, 2008).

As the purchasing power of Muslims increases, the Islamic economy is creating value for consumers and the economies involved. Efforts are being made to develop intra-OIC trade, as the OIC countries are becoming more and more integrated with the global economy, as suppliers and consumers, as well as providers and seekers of foreign investments. With a population growing twice as fast as the global population, the Muslim world is poised to take center stage in this new "new economy". The Islamic economy sectors are creating opportunities and building an unstoppable momentum. Muslims are increasingly emerging as investors, manufacturers, bankers and traders, competitors and suppliers in the global economic system. The fast-growing and predominantly young Muslim population of 1.7 billion people represents a major opportunity.

To optimize the development of strategy, a differentiated approach towards various markets needs to be adopted. The current positioning of OIC member states in MFT can be categorized in to 4 clusters; Group A: Leaders, Group B: Best Positioned for Growth, Group C: Potential for Growth and Group D: Need to Develop as shown in Table 9

Table 9: Mapping and Positioning of the OIC Member States in Terms of MFT. Grouping of 57 OIC member states into 4 clusters

Group A Leaders	Group B Best positioned for growth	Group C Potential for growth	Group D Need to develop
Malaysia Turkey United Arab Emirates	Saudi Arabia Qatar Indonesia Oman Jordan Morocco	Brunei Tunisia Kuwait Iran Bahrain Maldives Egypt Comoros Turkmenistan	Kazakhstan Bangladesh Algeria Azerbaijan Pakistan Kyrgyz Senegal Uzbekistan Tajikistan Lebanon Albania Nigeria Mozambique Djibouti Iraq Libya Mauritania Palestine

			Somalia Sudan Syria Yemen Afghanistan Guyana Surinam Benin Burkina Faso Cameroon Chad Cote d'Ivoire Gabon Gambia Guinea Guinea Bissau Mali Niger Sierra Leone Togo Uganda

Source: CrescentRating, 2015

The Leaders: The first cluster of markets consists of those that traditionally have sizeable contribution to tourism receipts and there would be a need to continue defending this base for top source markets. Even within this basis a differentiated approach could be adopted. This group of 3 countries are currently leading the MFT market. They have been the biggest beneficiaries of the growth in the Muslim travel market.

Table 10: Top 10 MFT, OIC and non OIC Member States Destinations

Top 10 MFT Destinations (OIC Member States, 2014)		Top 10 MFT destinations (Non OIC Member States, 2014)	
1	**Malaysia**	1	Singapore
2	**UA Emirates**	2	**South Africa**
3	**Turkey**	3	**Thailand**
4	**Indonesia**	4	**Great Britain**
5	**Saudi Arabia**	5	**Bosnia Herzegovina**
6	**Morocco**	6	**India**
7	**Jordan**	7	**Hong Kong**
8	**Qatar**	8	**Germany**
9	**Tunisia**	9	**Australia**
10	**Egypt**	10	**Tanzania**

Source: CrescentRating, 2015

In this study, we have selected the following countries as case studies.

OIC Member States	Non OIC Member States
Malaysia **Indonesia** **Turkey** **UAE**	**Thailand** **UK** **Spain** **New Zealand**

The reasons behind this selection are diverse:

These countries are in different development stages, when it comes to MFT; each case allows learning more about MFT implementation.

Malaysia, Indonesia, Turkey, and the UAE because they are very well positioned as MFT destinations within the group of OIC Member States, and

Thailand, the UK, Spain and New Zealand, because they are at different stages on the level of MFT development within the group of non OIC Member States. The availability of documentation was also a contributing factor in this selection. All case studies are only desk based studies.

In this study, and for some case studies, we have used the same strategy followed by COMCEC, in their 2016 "Muslim Friendly Tourism: Understanding the Demand and Supply Sides in the OIC Member Countries" Report: borrowing their conceptual framework for the evaluation of MFT, and comprising of three components; faith based needs, demand and supply side themes.

The six faith based needs refer to halal food, prayer, water usage friendly toilets, Ramadan services and facilities, facilities with no non-halal activities and recreational facilities with privacy. The demand side key themes refer to the reasons and motivation for travel. Four main travel reasons are identified by COMCEC. However, we have retained only three: leisure, business and medical. The religious reasons apply primarily to Hajj and Umra travel and concern mainly Saudi Arabia (which has not been retained as a case study). The supply side key themes refer to the travel hospitality services and facilities comprising transport terminals, transportation and accommodation services, attraction and activities, TA and TO, human capital and destinations as whole.

1. MALAYSIA

Malaysia is a multicultural country consisting of three major cultures namely Malay, Chinese, and Indian with a total population of 29,566,417 people (Department of Statistics, Malaysia, 2012). The official religion of the country is Islam while other religions are welcome as well because of the existence of Buddhists, Hindus and Christians in the country.

Tourism is a huge sector of the Malaysian economy. United Nations World Tourism Organization (UNWTO) listed Malaysia as the 12th most visited country in 2014. Malaysia competes with Thailand and other countries in South East Asia in attracting inbound tourism. Malaysia is ranked amongst the best destinations in the world for Muslim travelers by *GMTI 2015*. The country has shown consistent growth in visitor arrivals in recent years and is a popular place for international Muslim tourists.

Malaysia is the top tourist destination among ASEAN member states. The number of Muslim visitors to the country surged to over 5 million in 2012, more than triple the number in 2000, with the government expecting it reach 6.5 million in 2015. The government has been encouraging hotels to provide Shariah-compliant facilities, usually including a non-alcoholic environment, adequate prayer facilities, gender-segregated swimming pools, an ample choice of halal food and in-room signage indicating “Qibla”. While it may seem logical to assume the sector is dominated by OIC countries, in fact, many of the global specialty MFT companies are from non-Muslim countries, including Singapore’s CrescentRating and Halaltrip.com, and the UK’s Crescent Tours and Halalbooking.com. Table 11 shows the Muslim visitor arrivals and expenditure for the years 2010, 2014 and projection for to 2020.

Table 11: Muslim visitor arrivals to Malaysia for the period 2010 to 2020

Year (Inbound Tourism)	2010	2014	2020
Inbound Muslim Visitor Arrivals (Millions)	4.64	5.27	6.59
Inbound Expenditure by Muslim Visitor (US$ Millions)	3,427	4,290	5,228

Source CrescentRating, 2015

Malaysia received around 24.6 million from international tourists in 2010 compared to only 5.5 million tourists in 2009, representing an increase of around 347 % over tourist arrivals. In this context, Muslim tourist is seen to be the highest growth rate of international tourist arrivals in Malaysia. Statistics from Malaysia Tourism Industry indicate that Muslim tourists spent 4,735,775 U$ in 2007 to 5,784,884 million in 2010, which represented approximately 23.5 percent from the total tourist arrivals in Malaysia in 2010 (BERNAMA, 2011). Majority of these Muslim tourists were from Middle East, Iran, Indonesia, Singapore, Brunei, Pakistan, Bangladesh and Turkey.

When it comes to Islamic tourism, Malaysia boasts two of its biggest strengths: a well-developed halal industry and an extensive network of halal eateries around the country. The success of Malaysia's halal industry is largely due to the development of halal standards and a systematic halal assurance system, implemented nationwide. Malaysia is a pioneer in the development of halal standards and to-date has published no less than ten Malaysian Standards (MS), used as a guideline both nationwide and globally. The UN's Codex Alimentarius Commission has cited Malaysia as the best global example for halal food. In addition, food producers in Malaysia are encouraged to adopt and maintain standards that meet global benchmarks such as ISO 9000, Codex Alimentarius, the Quality Assurance Program, Hazard Analysis and Critical Control Point (HACCP), Good Hygienic Practice (GHP), and Sanitation Standard Operating procedures (SOPs).

Malaysia's MFT sector is taking the same route as its halal sector with its own set of standards and guidelines. These standards play a crucial role in establishing Malaysia's credibility in the global Islamic trade and tourism industry through streamlining best practices, creating systematic development and avoiding misuse and abuse by irresponsible, profit-motivated operators.

Muslim visitor arrivals are expected to witness a strong increase in the next years to reach 6.59 million by 2020. Malaysia has successfully positioned itself to be ideal for Muslim family tourism. Government authorities are branding their destination to offer "Muslim friendly tourism". In 2014 the Muslim tourist arrivals was 5.27 million. Malaysia receives a good number of inbound tourist from the GCC countries each year. It is providing for the faith-based needs of Muslim Travelers. These are:

a) Halal Food: Access to Halal food is easy and has been one of the top reasons why Muslim tourists feel at home in Malaysia. Almost all types of cuisine (Malaysian, Korean, Japanese, etc.) and all types of fast food are available.

b) Prayer Facilities: Thousands of mosques are located in Malaysia. Most shopping malls have Halal restaurants as well as prayer rooms.

c) Ramadan Services: Cities such as Kuala Lumpur and Penang offer Ramadan night markets with street food and their hotels offer Iftar buffets.

d) Water friendly Washroom: Most Hotels and public toilets are water usage friendly.

e) No non-Halal Activities, Recreational facilities and facilities with privacy: There are growing numbers of facilities, especially Hotels that are catering to these needs.

Table 12: Malaysia Demand Side Analysis

Types of travel	Key Demand Factors
1 **Leisure Travel**	Key source markets are neighboring countries Indonesia, Singapore and Brunei, and GCC counties. Leisure products: shopping, dining, sightseeing and beaches. Competition in attracting Muslim tourist remains strong from Singapore, Indonesia and non-OIC member state countries like Japan and Korea.
2 **Business Travel**	Malaysia is a major MICE destination in the region. Kuala Lumpur is a major venue for Islamic or halal themed global events. It is also a regional financial and service center attracting businesses. Major multi-nationals have regional headquarters in Kuala Lumpur.
3 **Healthcare Travel**	Medical tourism is a significant sector of Malaysian economy. An estimated 1 million tourists visited Malaysia for medical treatments in 2014, representing US$200 million. Malaysia is one of the most preferred medical tourism destinations, providing modern private healthcare facilities and highly knowledgeable medical professionals. In 2014, Malaysia was ranked the world's best destination for medical tourism by the Nomad Capitalist. Malaysia was also included in the top 10 medical tourism destinations list by CNBC.

Table 13: Malaysia Supply Side Analysis

Factors	Key Supply Factors
1 **Transport terminal services**	Airports, cruise terminals, railway stations, etc.Kuala Lumpur International Airports (KLIA 1 and KLIA 2) are the major airports of the country and offer MF facilities ranging from prayer areas to halal dining.
2 **Transportation services**	Airlines, cruises, railways, etc. Malaysian Airlines is the country's national carrier. AirAsia and Malindo Air are the country's budget airlines. All provide Halal food. Leading OIC Member State destinations from Malaysia: Indonesia, UAE, Bangladesh, Brunei and Qatar.
3 **Accommodation services**	Hotels, resorts, etc. Most accommodation facilities in Malaysia are MF. They offer halal-certified food, other MF facilities: availability of the Quran, in-room Qiblah signage, prayer mats, women-only level, separate prayer rooms for males and females, separate spa facilities.
4 **Attractions & Activities**	Shopping, beaches, sightseeing etc. Almost all attractions in the country offer MF environment. Halal food and prayer facilities are available on the different attraction sites. Muslim tourists enjoy the modern shopping environments in Malaysia.
5 **Travel agents/Tour operators**	Many Muslim tour operators are providing MF holidays to Malaysia. TO taking initiatives in understanding the Muslim travelers, and offer customized tours

6 **Human capital**	Extensive workshops and seminars are organized to educate all stakeholders in the travel industry. The trainings cover many areas and not just customer service: promotion, marketing, sustainable tourism and community tourism.
7 **Destinations**	Middle East tourists in particular have now started traveling to other destinations in Malaysia, like Langkawi and Penang.

The key and unique strength of Malaysian success story on MFT is the commitment of Tourism Ministry as early as 2009 to identify the Muslim market as a priority market. This has led to the creation of the Islamic Tourism Centre (ITC). It is a commitment that has been embraced by many travel service providers. The country has made strong efforts in making the destination a competitive holiday option for Muslims. MFT is not about changing or creating new products and services. Instead, destinations would only need to make adaptations and adjustments to fully accommodate the needs of Muslims. MFT is a concept that Malaysia discovered earlier than others. This commitment also has led to rolling out extensive education programs across the industry and developing guidelines and standards for the key services. This has led to the implementation of most basic services such as halal food, prayer rooms and water friendly toilets across all facilities. They have been also very well maintained. One of Malaysia's advantages is visa-free access where Arabs and Gulf States nationals do not require visas to visit Malaysia and they can stay for a maximum of three months in the country.

Most Arab and Asian Muslim tourists also enjoy modern shopping environments in Malaysia especially for luxury goods. Key challenge facing Malaysia in terms of the MFT market is the growing competition for the same source markets in the region. Malaysia could not rely solely on the current trend of foreign arrivals as factors such as the changing tourists needs and other Asian competitors are among challenges that need to be confronted. The ''new tourism'' is beginning to take up the demand characteristics such as quality products and experience, free and independent travelers (FIT) as opposed to mass tourism, use of new technologies in information seeking and distribution, maximize yield not volume, environmental concern and protection and direct marketing.

Thus, Malaysia has to enhance the tourism industry in the future in order to remain competitive and ensure what it offers fulfils the global demand of the Muslim tourism industry. The key lesson learnt in Malaysia's success story is that a government led commitment is required to activate the whole industry to make MFT a priority market for the destination. This has led to it now becoming the best destination for Muslim visitors in the world with all facilities, services aligning to cater to this segment. The other lesson from Malaysia is that it was committed to promoting itself as a Muslim friendly destination.

In terms of tourist arrivals, Malaysia has been the topmost Muslim tourism destination in the world, having Indonesia and Singapore as its top market countries (Dinar Standard and CrescentRating LLC,2012). It registered an estimated 5.44 million Muslim tourists in 2012 (equivalent to 21.75% of Malaysia's total tourist arrivals for the same year) compared to 5.22 million in 2011 (ITC, 2014).

Malaysia has been making efforts to brand itself as an Islamic and halal hub in recent years. It has formed rules on unacceptable tourist behaviors which are forbidden by Islam (Henderson, 2003a), yet some activities such as drinking alcohol, wearing scanty clothing, sun bathing naked, and serving pork in restaurants are found in the country, especially in touristic places.

Malaysia's Strategy in targeting Muslim market

After the September 11 attack, Malaysia has moved more aggressively to take advantage of the Muslim market. The Islamic factor was used by Malaysia to attract the Muslim niche market (Salman & Hasim, 2012). Although, (Din, 1989), Malaysia continues to provide a double standard (two sets of laws for Muslims and non-Muslims) which prohibits and restricts sensitive actions only for Muslims while non-Muslims are not restricted to follow the same Islamic laws. This strategy seemed to work well in balancing tourist needs with religious values (Din, 1989). Malaysia has been attempting to portray itself as an Islamic destination both through large-scale campaigns and through small businesses such as hotels and travel agents. These efforts may be divided into several measures as follows.

Efforts through large-scale campaigns

1. Islamic Civilization: Promoting Islamic civilization: opening new horizons to Malaysia's tourism industry.

2. Developing MFT as a promising approach to attract Muslim tourists: through numerous Government Departments and agencies, universities, industries and NGOs.

3. The Halal Master Plan: developed in three phases (1: 2008-2010, 2: 2011-2015 and 3: 2016-2020) and addressing the issues of certification.

4. Adopting a strategy to encourage ME tourists to travel beyond the Klang Valley as early as 2005: promoting other destinations like Langkawi and Penang (according to MATTA).

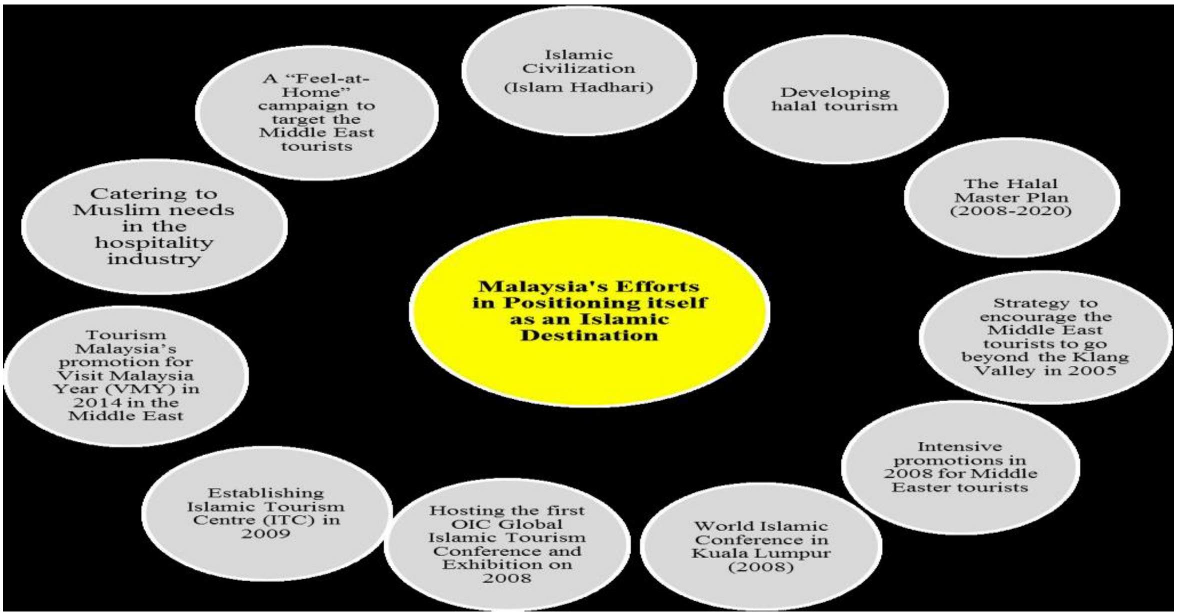
5. Intensive promotions in 2008 for Middle Eastern tourists: emphasizing Malaysian life and culture, eco-tourism, medical and health tourism, spa, honeymoon, and Malaysia My Second Homeprogram (Ariffin & Hasim, 2009).

6. Hosting the first OIC Global Islamic Tourism Conference and Exhibition and World Islamic Conference in Kuala Lumpur in 2008: sending the message of Malaysia as an Islamic destination.

7. Establishment of Islamic Tourism Centre (ITC) by Tourism Malaysia in 2009: enhancing the development and expansion of Islamic tourism market.

8. Malaysia's promotion of VMY 2014 in the ME: offering Malaysia as a platform to market and create awareness of VMY 2014 to the ME travel and tourism industry players in the Dubai ATM, launching of apps to find information on tourist destinations in Malaysia, book flights and hotels, and get the best travel deals and packages to Malaysia, organizing regular familiarization trips for journalists and travel agents from the Middle East (Ariffin & Hasim, 2009).

Figure 3. Malaysia's Efforts in Promoting as an Islamic Country



Efforts through smaller businesses

1. Catering to Muslim needs in the hospitality industry: This strategy requires first-class hotels to provide prayer rooms fully equipped with prayer mats, the Quran, the Surah Yasin, the tasbih, and Qibla stickers.

2. Adopting the strategy under a "Feel-at-Home" campaign to target the Middle East tourists: There were different schemes in this strategy (Ariffin & Hasim, 2009) including:

- Having "Ain Arabia" (Arab street) located in KL providing ME cultures and food.
- Putting signage in Arabic texts and placing Arabic-speaking employees at KLIA Airport, hotels, restaurants and shopping complexes.
- Arranging special events such as the "Arabian Nights" serving Arab food in some hotels.
- Adding the Arab Radio and Television (ART) into some hotel's TV channel offerings.

- Arabic printed guestroom letters, leaflets and brochures.
- Providing limousines at the KLIA Airport for Arabs who travel in a family of up to eight members.
- Launching the first local Arab newspaper titled "Ahlan Wasahlan", provide detailed information on Malaysian tourism activities.

Malaysia's Islamic offerings in perspective

There are plenty of tangible and intangible Islamic attributes in Malaysia that may inspire Muslim tourists to visit the country:

1. Inclusion of Mosques and prayer facilities:

2. Halal food paradise for Muslims: Availability of halal food is of a great importance to Muslim tourists. Malaysia particularly promoted its halal food in the ME and has increased the size of its halal food market from US$ 6.6 billion in 2004 to US$ 8.2 billion in 2009 (Bon & Hussain, 2010).

3. Existence of local Muslim communities: Malaysia's Muslim population is mainly concentrated in Terengganu, Kelantan, Pahang, and Kedah. In fact, Malaysian Indian Muslim Associations (PERMIM) and Malaysian Chinese Muslim Association (MACMA) were established in order to protect Chinese and Indian Muslim minority groups' interest and welfare. In a study on Islamic tourists in Malaysia, Rahman (2104) found that the friendliness of local people which facilitate communication with them was amongst the important destination attributes that manifest Malaysia's image as a worthy tourist destination.

4. Islamic stability and safety of the country: Malaysia paved the way for Middle Eastern tourists by giving them travel visa for a longer period while attempted to enhance the image of the country as an Islamic and safe country.

5. Online image of Malaysia as an Islamic hub: Tourism Malaysia website is featuring prominent pictures of Malay religious cultures, crafts, customs, and traditions. Islamic arts and architecture, Islamic dress code, Quranic calligraphy, mosques, Muslim prayer schedules appear on some homepages of Penang, Perlis, Kedah, Kelantan, Labuan, Melaka and Terangganu.

The following SWOT analysis indicates points or areas of strengths, weaknesses, opportunities and threats that Malaysia may find strategically useful in moving its international Islamic tourism forward (Figure 4):

Figure 4. SWOT Analysis of Malaysia's Branding as an Islamic Hub

STRENGHTS	WEAKNESSES
Rich Islamic artifacts around the country, Identifying the Muslim market as a priority, Early political commitment, Islamic funding and financing, Creation of ITC, Creating new products and services, Adaptations, adjustments to accommodate Muslim tourists needs, Implementation of most basic services, MF healthcare services,	Existence of parallel non-MFT alcohol, gambling, entertainment, non-separation of recreational spaces for men and women, etc. Frequent featuring of Malay cultures and traditions rather than Islamic aspects, Low advertising for dominant Islamic places in Malaysia, such as Kedah and Kelantan,

Visa free access for Arabs and GCC nationals, Extensive education and training programs, Development of standards and guidelines	
OPPORTUNITIES	**THREATS**
Activating the whole industry to make MFT a priority market, More aggressive branding and positioning of Malaysia in Halal Tourism, Developing of new Islamic products and services, Enhancing Muslim travelers' awareness about the various offerings of Malaysia, Involving more media and Travel Agents, Employing Muslims from other countries	Growing competition from same region countries, "New tourism" taking up demand characteristics, Free and independent travelers, Displaying of non-Islamic images in Tourism websites, contradicting the MFT image of the country, Loss of non-Arab tourists, due to overemphasizing on Arab tourists

Conclusion

The growing number of Muslim tourists in Malaysia provides the occasion for evaluating the country's branding and marketing strategies as a preferred Islamic destination. Actually, Malaysia with its multicultural setting, cuisine, and heritage is already a worthy destination, but it needs further enhancement with respect to Islamic tourism. By focusing on Malaysia's efforts in positioning itself as an Islamic hub this study has highlighted, by means of a SWOT analysis, critical issues pertaining to the branding of the country as an Islamic destination.

a. **Beyond food and drink sector:** Halal, however, extends beyond the food and beverage (F&B) sector and has an impact on many other products and services. Notably, Malaysia is one of the world's leaders in Islamic finance, for example.
b. **Halal logistics:** The growth of the halal trade globally has created opportunities along the halal supply chain in a number of areas, notably manufacturing, warehousing and transportation.
c. **Halal fashion:** So-called 'halal fashion' is a booming sector and one driven by the rising incomes of many Muslims and by the growing desire of (particularly female) young Muslims to look fashionable while observing their religious faith.
d. **Penang's Strong Drive for Tourism:** Penang's strong drive for tourism has managed to draw quite a substantial number of high spending power tourists from the Middle East countries, particularly from Saudi Arabia and the United Arab Emirates. While most of the leisure oriented Muslim tourists are attracted mainly by the sea, beaches, shopping, and some even by the diversified culture/customs or architecture/heritage buildings in Penang, food is one of the essential elements of the tourist experience.

2. INDONESIA

Indonesia is the largest archipelago in the world, with more than 17.000 Islands. There is a population of 250 million, 88% of which are Moslem. There are more than 300 distinct native ethnicities, speaking 746 languages. There is a huge biodiversity in the country. At present, Indonesia is the 16th largest economy in the world. In 2030, it is projected to be the ninth largest economy (McKinsey Global Institute). Muslim Middle Class Income approximately 112 million people, with a spending capacity of US $ 9.3 Billion/month (SWA-Inventure, 2014).Tourism in Indonesia is an important component of the Indonesian economy. The tourism sector is ranked as the 4th largest industry. Singapore and Malaysia are the top two sources of visitors to Indonesia. Indonesia was ranked 6th world-wide in the Global Muslim Travel Index (GMTI) 2015. Indonesia is setting an agenda of ambitious targets over the next 5 years (2015-2019). In 2015, Indonesia, won three Awards: The World's Best Halal Tourism Destination, The World's Best Halal Honeymoon Destination, and The World's Best Family Friendly Hotels. In 2016, it was ranked second of Top 10 Ramadan Destinations. Tourist Arrivals in Indonesia are expected to increase from 9.4 million (2014) to 20 million (2019).

Table 14: Indonesia: Strategic Initiatives

I. Policy/ Regulation Development	• Stakeholder • Growth Stimulant Policy & Regulations • Budget
II. Marketing & Promotion	• Branding • Advertising • Selling
III. Destination Development	• Attraction • Amenity • Accessibility
IV. Capacity Building	• Human Resource Certification • Business Certification • Halal Tourism Socialization

Muslim Tourist Arrivals

The number of Muslim arrivals at Indonesia has increased slightly in recent years. Table 15 shows inbound tourism for the years 2010 to 2020.

Table 15: Muslim visitor arrivals to Indonesia for the period 2010 to 2020

Year (Inbound Tourism)	**2010**	**2014**	**2020**
Inbound Muslim Visitor Arrivals (Millions)	0.90	1.16	1.74
Inbound Expenditure by Muslim Visitor (US$ Millions)	984	1,328	1,328

Source: CrescentRating, 2015

Indonesia is expected to witness an increase in the inbound Muslim tourist arrivals. The overall tourism receipt of Indonesia has also increased in a steady pace. Based on estimation, the receipt from Muslim tourism is around US$ 1.78 billion in 2020. Muslim visitor arrivals are expected to grow in the next five years to reach 1.74 million by 2020. In 2014 the Muslim tourist arrivals was 1.16 million. This translates into a growth rate of 11.4 percent. The percentage of Muslim tourist visitors in 2014 was 13.3 percent of total arrivals and this would increase to 17.7 percent in 2020. Arrivals are expected to increase from 9.4 million (2014) to 20 million (2019).

Faith-based needs of Muslim Travelers

a. Halal Food Halal: certification of restaurants is not well established in Indonesia. However, most local food is considered halal. This may create some anxiety among Muslim visitors, especially those from South East Asia. There has been discussion at the government is eager to better streamline the Halal certification program through MUI, Indonesia Ulema Council, founded in 1975 as a body to produce fatwā and to advise on contemporary issues. Halal certificate is a requirement to get government permit for halal labeling on the packaging of a product.

b. Prayer Facilities: There are approximately 600,000 mosques nationwide. Shopping malls, theme parks, airports, and even some restaurants have prayer rooms.

c. Ramadan Services: Indonesia is a comfortable destination for Muslims during Ramadan. However, not much focused outreach has been deployed to attract Muslim visitors to Indonesia during Ramadan.

d. Water friendly Washroom: Hotels are now beginning to provide rooms with their bathrooms having water friendly facilities.

e. No non-Halal Activities, recreational facilities and facilities with privacy: A growing number of MF hotels are catering to this need. As an example, the hotels of the Sofian group.

Table 16: Indonesia Demand Side Analysis

Types of travel	Key Demand Factors
1 Leisure Travel	Most travel to Indonesia is for leisure purposes. Shopping, sightseeing and dining are key attractions. Islamic culture is prominent in Sumatra, especially in Medan and Tanjung Pinang. Islamic heritage tourism is popular among Indonesian Muslims and Muslims from neighboring countries such as Malaysia, Singapore and Brunei. It focus on visits to Islamic historical sites.
2 Business Travel	This is still an emerging sector. Indonesia is attempting to grow the MICE market segment, and to develop Muslim Lifestyle related events. Indonesia is holding its annual Halal Expo at the JIExpo. In 2014, a conference took place in Surabaya on the Launching of MFT in Indonesia. Indonesia is also trying to position itself as a hub for Islamic fashion.
3 Healthcare Travel	Indonesia is not presently known as a medical tourism destination. However, Indonesian hospitals have been improving and gaining more confidence. Indonesia can become an international health destination thanks to its huge potential and low-cost health and medical care.

Table 17: **Indonesia Supply Side Analysis**

Factors	Key Supply Factors
1 Transport terminal services	**Airports, cruise terminals, railway stations, etc.** Jakarta Soekarno-Hatta International Airport, the largest in Indonesia caters well to the needs of Muslim travelers. Being a Muslim country, it is "assumed" that most food is Halal. Many food outlets are certified Halal by the MUI. All terminals have prayer rooms open 24 hours a day. They cater to the needs of both male and female worshippers separately. Toilets and ablution facilities are also provided for males and females.
2 Transportation services	**Airlines, cruises, railways, etc.** Garuda Indonesia, the national carrier adequately caters to the needs of the Muslim travelers. It has a vast network and connects with a number of OIC countries.
3 Accommodation services	**Hotels, resorts, etc.** Indonesia has a wide variety of hotels from offering budget to luxury accommodation Muslim travelers, providing halal food and prayer information. Mf hotels are emerging, such as the Sofian Hotel group, chosen as the "Best Family Halal Hotel" at the "World Halal Travel Awards". Indonesia has positioned itself to increase the tourist arrivals especially from the GCC countries, by better understanding their specific requirements. Hotel staff was trained subsequently. In Lombok, hotels are also promoting themselves as MF, gaining progressively Halal certification. They must have signs pointing towards Mecca and copies of the Koran in their rooms, as well as kitchen where halal food can be prepared.
4 Attractions & Activities	**Shopping, beaches, sightseeing, etc.** Most Shopping Malls and attractions offer Halal food and prayer rooms. However, almost no beach resorts offer private beaches (like in Turkey).
5 Travel agents/Tour operators	Indonesia TO are now looking at providing MF inbound packages. It is still not widespread. No player really dominates the global Muslim travel niche. The opportunity is strong and many vendors are participating in various market segment areas. There is a market growth opportunity for an increasing number of vendors.
6 Human capital	There is relatively good knowledge and expertise towards catering to the needs of Muslim travelers. There is no structured program to develop human resources to cater to the MFT sector. Although some workshops are targeted at educating on this market.
7 Destinations	The Government is supportive in promoting Indonesia as a premier destination for MFT. It has produced tourist guides highlighting the country's best MFT destinations through the archipelago. It has also issued a set of standards and guidelines covering Hotels, Spas and restaurants for catering to the MFT.

Figure 5: SWOT analysis of Indonesia

STRENGHTS	WEAKNESSES
Wide range of tourism experiences with availability of prayer facilities at tourist spots and public premises. Well-developed attractions and entertainment options offering shopping and outdoor activities in parts of Indonesia. Many emerging MF hotels, ability to cater to the	Not enough signage of halal restaurants Not enough promotion of Indonesia as a MF destination

needs of the Muslim tourist Value for money destination in offering family Islamic tourism	
OPPORTUNITIES	**THREATS**
Branding and positioning Indonesia in MFT. Engaging news media and to increase awareness about MFT offerings of the country. Development of MFT infrastructure to support tourism across the archipelago in partnership with multinationals organizations and other countries. Themed campaigns for example tropical destinations with white sand beaches and blue sky, for Muslim families. Development of cultural and heritage tourism.	Competition from Islamic countries such as Malaysia, which offers an established tourism infrastructure. Low air connectivity to major destinations of the world. Low cost carriers have not established air routes to major international cities. Use of the word "Shariah" is scaring people perhaps of its connotation. Might slow down the growth of MFT in Indonesia.

Conclusion

Tourism in Indonesia is a significant source of its foreign exchange revenues. The country has much to offer to the tourist; from natural beauty, historical heritage to cultural diversity. Indonesia is a majority Muslim country. Hence, many of its existing facilities and infrastructure are MF. Providing a cultural experience is strength in the country's offering of MFT. Lombok is at the center of an Islamic tourism drive in Indonesia, which has the world's biggest Muslim population and is hoping to boost the number of visitors from wealthy ME countries. Other parts of Indonesia are hoping to benefit from the initiative as well. Aceh province, in western Indonesia and the only part of the country to enforce Islamic Shariah laws, and the capital Jakarta are both seeking to lure ME tourists, who often bring many family members. While aiming to continue to attract Western tourists who flock to its pristine beaches, the island is also seeking to promote its Islamic heritage, from numerous places of worship to shrines dedicated to ancient Muslim preachers.

Leisure travelers enjoy a cultural experience especially with an Islamic heritage focus. Although it started much later than Malaysia in terms of developing the MFT sector, it has been progressing well. In November 2015, it launched the Muslim Visitor guide to Indonesia. It has also launched promotion programs with social media influencers to display Indonesia as a MF destination. Some of the challenges Indonesia's tourism industry faces include the development of infrastructure to support tourism across the archipelago, and the impact of tourism development on the life of local people.

Despite the optimism of officials, there are concerns by some segments of the travel industry that advancement for Islamic tourism could alienate other visitors who want to sunbathe or relax on the beach with a drink. Nevertheless, the local government insists it can promote MFT without affecting the existing industry, and that party hotspots in the area will remain unaffected. A well thought out plan should be developed and communicated to the diverse local groups and communities when launching a MFT program/strategy. This plan should ensure that MFT market and services could co-exist with other traditional tourism markets and services.

Indonesia is making efforts to entice foreign investors for hotels and beach resorts, eyeing mainly potential developers from GCC countries such as Saudi Arabia, UAE and Qatar. ME countries have already expressed their interests to develop Indonesian beaches in order to create "large luxurious resorts" and tap into the potential the country has especially for Muslim holidaymakers. Indonesia is seeking to position itself as an alternative for Muslim tourists who keep travelling to non-Islamic destinations in the region. Saudi Arabia already made an example by committing to invest around $100m in a huge island resort in the Maldives, another Muslim nation with huge tourism potential.

This could be a role model for Indonesia, starting with beach developments. In Indonesia, ME investors want to make bigger tourist developments than in the Maldives. Nevertheless, they are having difficulties to find large enough land. Beach areas in West Java, surrounded by mountains and not far from Jakarta, but also locations outside of Java including Tanjung Lesung, Belitung, Padang, Selayar and Lombok, all of them lesser known tourism destinations in Indonesia that are predestined for beach resorts but have to catch up with infrastructure development.

MFT has been recognized as "an opportunity market" for Indonesia, inspired by its neighbor Malaysia's success in attracting Muslim travelers. However, while Malaysia has managed to attract millions of ME visitors, Indonesia was only getting around 200,000 in 2014, or around 3% of total Muslim visitors. To improve, Indonesia in a first step is now positioning the island of Lombok as a MF destination. Aceh and West Sumatra are to be touted as a role model for MF destinations in Indonesia.

The Saudis are interested in establishing representative MF travel agencies in West Sumatra and the UAE in West Nusa Tenggara, an island group east of Bali that includes Lombok which has been dubbed as the "island of 1,000 mosques." Overall, the Indonesian government expects to generate $12bn in revenue from 12mn foreign tourists visiting the country in 2016, 20% more than in 2014. In 2014, Indonesia attracted 9.44mn foreign visitors. During the World Halal Travel Awards 2015, held in Abu Dhabi last October, Indonesia bagged three awards in MFT for the Best Halal Tourist Destination and the Best Halal Honeymoon Destination being Lombok and the Sofyan Hotel in Jakarta being the best family-friendly hotel.

3. TURKEY

Turkey is quite rich in tourism potential. Its geographic location, climate, cultural diversity and rich history make it one of the most attractive destinations in the world. Currently, it is ranked as the fourth most popular destinations for the Muslim tourists in 2017. MFT market is growing fast in Turkey with strong domestic and inbound travel demand.

Turkish Airlines is growing rapidly to become a transport hub serving Europe, Africa, the ME and Asia. In terms of Halal food, the airline states on its website that all meals served on their flights are in accordance with Islamic religious beliefs. The hub airport for Turkish Airlines, Ataturk International Airport in Istanbul is one of the fastest growing airports in the world. In general, basic Muslim needs are largely catered at the airport. Many hotels in Turkey offer conservative holidays targeting the affluent and pious Muslim population. These hotels offer MF services. All the goods and services of tourism industry designed according to Islamic principles and offered to Muslim markets in Turkey are considered part of MFT in Turkey.

An Overview of Turkish Tourism Industry

Official tourism statistics provided by Turkish Ministry of Culture and Tourism shows that Turkey attracted over 33 million tourists in 2010. Tourism receipts exceeded $24 billion and average tourist spending was around $755. For a long time, Turkey has been none of the top ten tourist destinations in terms of tourist arrivals. Political stability of the country in the years 2000s has resulted in improvements in many areas including infrastructure building, international relations and event management, which all had strong impact on tourism development. According to projections, the country is expected to increase tourist numbers to 63 million tourists and tourism earnings to $50 billion by 2023 (Duman and Tosun, 2010).

For the year 2015, these figures became: 41 million for tourist arrivals, $31 billion for receipts, and $756 for average tourist spending.

Turkey is quite rich with its tourism potential. Its geographic location, climate, multicultural nature, demographic structure and diverse history make it one of the most attractive destinations in the world. Among the types of tourism actively pursued in Turkey are sea-sun-sand tourism, health and thermal (hot-spa) tourism, winter tourism, highland tourism, cave tourism, hunting tourism, event tourism, golf tourism, youth tourism, yatch tourism, botanic tourism, silk road tourism, faith tourism, air sports tourism, mountaineering tourism, rafting tourism, diving tourism and bird watching tourism.

Currently, Turkey has around 1.000,000 touristic bed capacity and 3625 accommodation facilities. Antalya, Istanbul and Mugla are the three major tourism cities in Turkey. These cities accommodate around 50% of international visitors to the country.

Table 18: Important Data in Turkish Tourism

Years	International Tourist Arrivals in Turkey (Thousands)	International Tourism Receipts in Turkey (millions US$)	International Tourism Expenditures in Turkey (millions US$)	Balance of International Tourism in Turkey (millions US$)	Arrivals from OIC Countries (Thousands)	Tourism Receipts from OIC Countries (millions US$)
2010	31364	26318	5817	20501	4864	4082
2011	34645	30093	5372	24721	5342	4639
2012	35698	31455	4605	26850	5067	4465
2013	37795	34863	5268	29595	6137	5661

Source: SESRIC, International Tourism in the OIC Countries. Prospects and Challenges, 2015.

MFT Industry in Turkey

The start of mass tourism activity in Turkey was with Tourism Incentive Act in 1982. The years 1990s through 2002 were those of political instability and economic downturn, which resulted in the increase of mass tourism activity with all-inclusive vacations. The last decade (2002-2012) has been one of political stability and economic development. Turkey has made tremendous efforts to boost tourism: planning and infrastructure, recognition in European and Russian markets, promotion activities, increase in tourist numbers, product diversification, intensification of MFT, and a holistic tourism planning through the Turkish Tourism Strategy 2023. At the same period, MFT was being discussed in various international platforms, gaining support from member countries in the COMCEC.

In Turkey, the hotels that use halal tourism concept are known to obey all the legal requirements of the ministry directives but use hotel facilities compatible with halal tourism concept. They separate pools and beach facilities for men and women, apply certain dress code in certain areas, don’t accept opposite gender children (6 and above) to swimming facilities, ban photographing in swimming facilities, encourage social programs in Islamic content and market through certain distribution channels.

Major Types of MFT Activities and Resorts

Accommodation facilities that serve to Halal tourism industry in Turkey can be categorized into two groups. One of these groups is seaside facilities. They represent a fairly new concept for Turkish tourism. Their number of these facilities is increasing. The other group of facilities includes hot-spa (thermal) facilities that cater to both health tourism and entertainment tourism. Most of the seaside facilities applying halal tourism concept are located in the vicinity of Alanya, famous tourism resort. Turkey is rich with hot-spa (thermal) resources. Potentially, it is considered, among seven countries in the world, to be the top one in Europe.

Market Description and Consumer Behavior

Markets for the MFT facilities in Turkey can be categorized into three broad groups.

The first group is Turkish citizens living and working in European countries. Around 2.4 million Turkish citizens live in Europe and they constitute a lucrative market for these facilities (Dogan, 2010).

A second market for MFT facilities includes upscale customers with conservative Islamic lifestyles. Turkish upscale Muslim customers have usually spent their leisure time in their private residences in touristic areas but now attend modern halal facilities. Recent economic developments in Turkish economy have given middle class customers a chance to spend vacations in these facilities.

A third market for MF facilities in Turkey is foreign Muslim tourists especially from ME countries. Turkey's new MF facilities have become popular in Muslim countries recently and created a lot of news in Turkish media.

One of the concerns raised by customers is related with hotels that serve to multiple customer groups. Increasing demand for MFT encouraged some hotels to change their concepts recently although they may not apply Islamic rules to the fullest in their services. Overall, respondents find halal tourism hotels acceptable; they consider such a vacation as a need and give priority to prices and cleanliness in hotel selection.

The role of Internet

Werthner and Klein (1999) point out that with the enormous amount of information potentially available to travelers, the internet constitutes an important platform for information exchange between the consumer and industry suppliers (e.g., hotels, transportation sectors, attractions), intermediaries (e.g., TA), controllers (e.g., governments and administrative bodies), as well as many non-profit organizations such as destination marketing organizations (Xiang and Gratzel, 2010, Yeşil, 2013) states that news in the media is an effective source for travel planning.

In the case of Turkey, cultural industries (especially TV series) are promoting the image of Turkey and having a strong impact on that level.

Figure 6: SWOT Analysis for Turkey

STRENGHTS	WEAKNESSES
One of the leading tourism destinations in the world, Proximity to Europe, to Arab and GCC countries, Natural beauty, cultural diversity, Islamic history, Strong holistic tourism planning and infrastructure development, Diversity of touristic offers, Good implementation of most MFT requirements, Cheap for shopping	Proximity to ME region, Perception of high prices. Disparity in hotels quality
OPPORTUNITIES	**THREATS**
Development of middle class,	Political threats in the region,

Three types of markets, Increasing demand for MFT, Strong activity on the Internet, Recognition in European and Russian markets, Culturally present in the Arab and GCC countries, thanks to its cultural industry products.	Proximity to other touristic destinations: Greece, Croatia, Montenegro, Lebanon, etc.

MFT is steadily growing in Turkey. Therefore, MFT marketing actors should consider the expectations of MF hotels both for Muslim and non-Muslim travelers. Thus, internet and social media provide a significant communication platform for MF hotels because MFT orientated industry suppliers and intermediaries generally target the Muslim population. Thus, internet might offer a great opportunity to get attention from this niche market.

ABOUT KONYA

Konya is located in the southern part of the Middle Anatolian Region, the largest province in Turkey in terms of area. The province has a population close to 2,1 million, of which 1,1 million live in Metropolitan Konya. Konya is one of the Anatolian tigers, which means the provinces had a remarkable and fast increase of their economy and production since the 1980s.

Konya is established on one of the oldest civilized region of Anatolia (Çatalhöyük region, 7.000 BC) has always been an important Agriculture, Science, Transit Trade and Industry Center. Konya has played a crucial role during the time of the Silk Road. Being a center for Sufi mystical practice and teaching, Konya is a place of pilgrimage for the whole of the Muslim world, hence the all human-being caring about Humanism and Tolerance. This was the adopted home of Mawlana Jalaluddin Rumi, the Sufi mystic who founded the Mevlevî whirling dervishes order; his writings helped reshape Islamic thought and modified the popular Islamic culture of Turkey through Humanistic Philosophy.

The Characteristics of Tourism in Konya

The role of Mawlawi tourism in the urban development process of Konya is important, and falls in a new modernization approach, the global local nexus approach, glokalism. Mawlawi tourism has been playing crucial roles in articulation of Konya to the global markets and urban identity building process, by establishing a city trademark and international business connections. Within the diversification in the global tourism, Mawlana tourism can be defined as a cultural, religious, and spiritual tourism. It connects Konya to the global markets.

Tourism is one of the most rapid growing sectors, allowing Turkey to articulate her economy to global capitalism. At the same time, it is one of the main activities to gain cultural interaction between the country and the outside world. Like in many places of Turkey, tourism plays a crucial role in Konya. The city has many historical monuments and places such as Karatay Madrasa, and Alaaddin Mosque. Since Mawlana Jelaluddin Rumi, the founder of the Mawlawi Sufi order lived and established his brotherhood in Konya. Sufism is not only an attraction factor merely for Turks, but it does represent an attraction for people from all around the world. Both on the national and international scale, Konya is advertising and marketing itself according to a historically constructed identity in the tourism sector based on Mawlana. Mawlawi tourism is multidimensional, and fits in various types of tourism.

First, Mawlawi tourism is a type of pilgrimage tourism to the Tomb of Mawlana and its center, since Mawlana has a special place for religious and spiritual reasons, representing heterodox and philosophical Islam. The relationship between tourism and religion is one aspect of the commercialization of Mawlawi order in tourism sector. Secondly, Mawlawi tourism is a spiritual tourism. Muslims and non-Muslims alike visit Mawlana tomb to relax their mind and to feed their spiritual emptiness. Thirdly, Mawlawi tourism is also a cultural heritage tourism, since Mawlana and his Sufi order have become one of the main aspects of Anatolian Turkish cultural history. Lastly, Mawlana tourism is an urban tourism. It is organized, commercialized and institutionalized in the urban space of Konya. Mawlana becomes perhaps one of the most important signifiers and identifiers of Konya through tourism. The Mawlawi tourism through Mawlawi Order is a project prepared and supported by the Ministry of Culture and Tourism and the local administration of Konya.

Marketing of Mawlawi Tourism

In 2008, the thought and figure of Mawlana and whirling dervishes was taken under protection by UNESCO. The year 2007 has been declared as the year of Mawlana. The Mawlana Culture Center is preparing whirling programs. A big number of tourists are visiting Mawlana Museum and it is claimed that it is the most visited museum of Turkey in 2016. The development of the Mawlana tourism brought an increase in the usage of the Konya airport.

Mawlana Tourism: Religious or not?

It may be argued that the religious character of Mawlana comes behind the other motivations of tourists: seminars, conferences and business fairs, etc. Although many tourists are spiritually interested in gaining deeper knowledge about Sufism, it is difficult to claim that Mawlawi tourism is only a religious tourism. Secondly, there are other touristic sides in the city center, such as Karatay Madrasa, Mawlana Tomb and Museum, Alaaddin Mosque, in the old city center around the Alaaddin Hill. Through the advertisement of Konya by Mawlawi tourism, there could be profitable connections and trade agreements with foreigner businesspersons. Many international fairs are organized in Konya. In other words, Mawlana becomes such a trademark or image for Konya.

4. UNITED ARAB EMIRATES

MFT is the fastest growing area of global tourism. The market is expected to surpass $230 billion by 2020 as the global Muslim population grows and becomes more affluent. UAE has become a popular tourism destination, attracting more than 11 million visitors of all backgrounds every year. Increasingly, Muslims from the ME and elsewhere are looking to the UAE as the ideal destination, because of its Islamic and modern sensibilities. Sharjah, in particular, attracts a large share of the MF and family tourism industry because its hotels serve no alcohol and provide separate pools, gym and spa facilities for men and women. With the UAE becoming an increasingly popular cruise destination – the Costa, MSC and Royal Caribbean companies are all offering several sailings in the Arabian Gulf over the winter, and several other lines will make stopovers in Dubai. At the same time, the UAE is embracing its role as a world leader in the provision of Islamic finance, with Dubai aiming to become the "capital of the Islamic economy" in 2016. MFT and Islamic finance make perfect partners. The UAE could then compete with Malaysia and turkey.

UAE is one of the fastest growing destinations for Muslim visitors. This will enable the country, especially by Dubai and Abu Dhabi, to become an attracting destination for Muslims, mainly for leisure and business purposes. Dubai has emerged as an important tourist destination in the global tourism map. It is positioning itself as the "Islamic economic capital of the world", as a MFT destination, especially for families. Muslim visitor arrivals have witnessed a steady growth over the past five years. Table 19 shows inbound tourism data from 2010 to 2014 and projections for 2020.

Table19: Muslim visitor arrivals to United Arab Emirates for the period 2010 to 2020

UAE Year Inbound Tourism	2010	2014	2020
UAE inbound Muslim Visitor Arrivals Millions	3,63	6,52	13,13
UAE Inbound Expenditure by Muslim Visitor US $ Millions	3,757	7,734	12,947

Source CrescentRating, 2015.

UAE is expected to witness the fastest growth in inbound Muslim visitor arrivals over the forecast period, at 13.4 percent. In 2020, the total inbound tourist arrivals will be 13.13 million to the UAE. This means 61.2 percent of all arrivals into the country.

Visitors into UAE come principally from Arab countries, especially Saudi Arabia, Europe (25%) and Asian countries (20%). Dubai and Abu Dhabi are the two leading destinations in terms of tourist arrivals into the UAE. The main factors for tourism growth were government initiatives and continuous efforts to promote country's travel and tourism on the domestic and international levels. It is expected that the travel and tourism sector will continue to grow over the forecast period (2015–2020). UAE government is making significant efforts to promote tourism by developing tourism infrastructure, participating in international events and promotional campaigns in key source countries in particular GCC nations. Emirates airlines operating out of Dubai is also a major contributor to tourism growth to UAE.

Faith-based needs of Muslim Traveler

a. Halal Food: In January 2014, Emirates Authority for Standardization and Metrology mentions – "Issued by the 19 Council of Ministers Resolution No.10 of the national legislative system for Halal products; the Emirates Authority for Standardization and Metrology has now introduced a special 'Emirati system' for the control of Halal products. This system comprises of basic elements pertaining to Halal products, destination certificates and accreditation bodies such as the Halal certification. This concerns mainly the control of food products entering the emirates and claiming to be Halal. Most food outlets in UAE are "assumed" to be Halal. The center offers training on halal requirements on certification and awareness sessions for slaughterhouses and food manufacturers.

b. Prayer Facilities: Prayer facilities can be found with ease almost anywhere in UAE. Shopping malls, theme parks, hotels etc. all have allocated prayer rooms for males and females. Prayer rooms for men and women are located throughout the Dubai Mall.

c. Ramadan Services: Dubai hotels and beach resorts promote great offers and room rates during Ramadan. Shopping malls, restaurants and various retail outlets also have in the fasting month special deals, discounts and other promotions. Many hotels build a "Ramadan tent" or "Ramadan café". Ramadan tent plays an important part in providing services in the month to Muslims. The aim is to create an atmosphere or ambience of friendship. Both Iftars and Suhoors are offered to all hotel guests in these tenets. Ramadan services are well promoted on various websites, for example Expat Echo Dubai (www.expatechodubai.com). Dubai's best Ramadan tents (www.visitdubai.com/en/articles/dubai-best-ramadan-tents) contains a list of the leading Ramadan tents in the country.

d. Water friendly Washroom: Hotels room washrooms and public toilets are water usage friendly across the Emirates.

e. No non-Halal Activities and Recreational facilities and facilities with privacy: A growing number of hotels in the UAE do not serve Alcohol, and claim all food is Halal. A few international chains of hotels that are located in UAE have adopted a Muslim friendly policy. These hotels would for example have different timings for the use of their recreational facilities. The focus is on positioning and promoting the country as a family, event and business destination.

Figure 7: UAE Demand Side Analysis (Reasons and Motivation for travel)

	Demand Side Analysis
a) Leisure Travel	Leisure travel represents the majority of travel to UAE. Growth key factors are the UAE's efforts to attract tourists by investment in tourism infrastructure, by emergence as a global aviation hub with Emirates airlines. The UAE is also enhancing its position as a family destination, with numerous "Leisure" products, and as an international sports events organizer. It is a renowned shopping destination, with huge malls. It has developed LCC (low cost carriers), Flydubai and Air Arabia solidly establishing themselves in the market. It is also a cultural place, with the opening of Louvre, Abu Dhabi Saadiyat Cultural District and the Zayed National Museum.
b) Business Travel	UAE is a regional hub for international meetings, incentives, conventions and exhibitions. Dubai hosts most regional MNC headquarters, regional organizations and exhibitions, such as the Arabian Travel Market (ATM), the Dubai World Trade Centre, the "Gulf Food", etc. Abu Dhabi Tourism and Culture Authority (TCA Abu Dhabi) is also actively promoting Abu Dhabi as a business travel destination. Ambitioning to be the most successful exhibition, conference and events center in the region. It also owns the ExCeL London, the largest exhibition venue in London. Abu Dhabi is also positioning itself as the "Halal Travel" destination of choice in the region. The inaugural World Halal Travel Summit" was held in October 2015.
c) Healthcare Travel	The government introduced a medical tourism visa to help the advancement of this market segment, to remove existing barriers and enable the further growth of the health and wellness sector. Foreign medical practitioners and medical specialist are now able to work in UAE for a limited period. UAE aims to attract about half a million medical tourists by 2020 and increase the medical tourism contribution to the economy. Medical infrastructure is expected to develop, and the number of healthcare staff in the private sector to increase, targeting OIC and GCC countries.

Figure 8: UAE Supply Side Analysis (Travel and hospitality services and facilities)

	Supply Side Analysis
	a) Transport terminal services (airports, cruise terminals, railway stations) Airports in Dubai and Abu Dhabi provide Muslim friendly services. Their restaurants provide Halal friendly meals. Dedicated prayer rooms are available at the air terminals.
	b) Transportation services The national airlines, Emirates Airlines and Etihad Airway, offer Halal food on board. However, alcohol is served on board the plane. No prayer space are available on the planes.
	c) Accommodation services (hotels, resorts) Most hotels now provide the basic services such as Halal food, Qiblah markings in rooms, prayer rooms in the hotel. Some hotels are not serving alcohol and also provide Quran or prayer mat if required. UAE has "Apartment Hotels" to cater to the Muslim family travel market, especially from other GCC countries. Some Hotel also have designated "ladies only" floors. Hotels that position themselves as a "Halal Hotels" have strict policies when it comes to not allowing alcohol brought into the hotel and only allowing married couples to stay in the hotel.
	d) Attractions & Activities (shopping, beaches, sightseeing) UAE in general and Dubai in particular continues to build attractions and Shopping Malls. Dubai ranks as the top Shopping destination. All attractions, shopping malls etc. provide the needed services such as halal food, prayer facilities etc. Some parks and beaches are reserved for "women only" during certain days of the week.
	e) Travel agents / Tour Operators Travel agents in the UAE focus on offering MF outbound tour packages. No focus is on providing "Muslim friendly" travel packages to the UAE. This may be due the perception that UAE as a whole is

	Muslim friendly and as such there is no necessity to particularly develop Muslim centric products. As for the outbound market, some big players are launching a series of MF tour packages to different parts of the world, offering a comprehensive range of leisure services, to the Muslims outbound market. Online travel agents are gaining market share in the UAE and continue to record strong levels of growth. By using social media and the internet, companies promote their products and encourage purchases by offering online promotions and deals only. Given the high level of penetration of the internet and social media in the UAE, online sales are expected to continue to grow.
	f) Human Capital There has been no comprehensive training approach to travel industry to cater to the MFT market.
	g) Destinations The UAE's tourism industry benefiting from the country's political stability. The UAE is considered a very Muslim friendly destination. It is ranked no. 3 in the Global Muslim Travel Index 2015. Focused efforts to develop the Muslim tourist market remains strong through the "Dubai the Islamic Economy Capital" initiative. By 2020, the percentage of Muslim visitors would be 61.2 percent of the total inbound tourism into the country. The political problems in some key regional tourist destinations is resulting in a significant increase in the number of visitors to the UAE as traditional visitors to those regional destinations increasingly choose the UAE as an alternative destination for their holidays.

Strengths and challenges for the UAE's MFT segment

Figure 9: SWOT Analysis for UAE

STRENGHTS	WEAKNESSES
Political stability, Popular tourism destination, Attracting family and FM tourism Leader in Islamic finance, Dubai Islamic economic capital of the world, Active on all types of travel: leisure, business, healthcare.	No comprehensive training approach to cater to MFT market,
OPPORTUNITIES	**THREATS**
Visitors mostly from Arab and GCC countries, Continuous government efforts to promote travel and tourism, Emirates connecting UAE with the world, development of LCC, Hosting numerous world tourism events.	Political problems in neighboring countries, Non-MF tourism activities: drug and sex.

From a MFT point of view, two factors strengthened UAE's position. One is the recognition of the "Family Travel" market; the other is the Shopping experience. The Dubai Shopping Festival is a month-long festival held during the month of January each year. Emirates like Abu Dhabi, Ajman and Fujairah have slowly been increasing their share of international arrivals. The challenge is to develop the other emirates in attracting more tourists. Qatar is also gaining prominence in the tourism map. United Arab Emirates also faces competition from less expensive destinations such as Lebanon and Egypt.

PART V

MFT DESTINATIONS.

CASE STUDIES FROM NON OIC MEMBER STATES

As mentioned before, the non-OIC countries to be studied here are Thailand, the United Kingdom, Spain and New Zealand. This will allow us to learn a lot about the implementation of MFT, because these countries are at different stages of MFT development.

5. THAILAND

Thailand has diversity in tourism resources; especially in geography, climates, flora & fauna, cultural diversity, etc. This enables both Thai and international tourists to choose between many provinces of Thailand. Thus, Thai government had continually promoted the development of tourism in various regions throughout the country. MFT is a market segment that is fast growing not only in Muslim countries but also globally. Non-Muslim countries like Australia, Taiwan, Korea, Japan, countries in Europe, are specifically catering to this tourism segment.

Thus, knowledge about Muslim tourists' behaviors and needs is highly needed for this new market of MFT business. The most popular theme of trip is Sun and Sea. Majority of tourist hired a car and travel with family. They demonstrated high needs towards the MF requirements: indication of Qibla, availability of Halal sign at MF restaurant, availability of Mosque, etc. This case study aims to provide useful information for policy makers and business managers in formulating the strategy and program to enhance Halal tourism potential in Thailand.

MFT in Thailand. General data.

a. Tourist Behavior: Seeing and experiencing a foreign destination is the main reason for visiting Thailand, followed by experiencing new and different life styles, interesting and friendly local people, being free to act, warm welcome for tourists, Environmental quality of air, water and soil, Outstanding scenery. Internet has proved to be the major tool for seeking information followed by Travel books, guides or brochures, word of mouth of family and friends, Tour Company or TO, and previous experiences, advertising, word of mouth of other travelers, tourist office, and travel articles or documentaries. It could be said that Internet is the most powerful and effective channel in promoting tourism to Asian Muslim tourists.

Prior to their visit, tourists are searching for information about attractions are the most popular information followed by weather, accommodation, activities, shopping, and food. While information about transportation, cost of living, and geography are under the same rank. These results should guide tourism officers and businesspersons in relation to provide tourism information in accordance with MFT needs.

Most popular theme of trip for tourists is Sun and sea followed by country and nature, get to know the place, activity holiday, visit friends or relatives and cities and monuments, cultural and historical, and religious trip.

Most of the tourists travel with family followed by friends, spouse, business colleagues, alone, organized tour group, and others. Muslim tourists prefer to travel with companions, especially with family. Thus, the tourism business sector should offer suitable MFT products for family needs.

Muslim tourists prefer to stay in hotels, resorts, homestay, guesthouses, and motels. While travelling through Thailand, they prefer hired cars, coaches and public transportation.

On food preferences, Thai food is the most popular choice among Asian Muslim tourists followed by Western, Arab, Indian and Chinese food. Thai food is well known and widely appreciated, while Western food is internationally acceptable and available in many restaurants.

In relation to shopping choices, majority of tourist prefer to buy cultural and traditional products, followed by clothes and leather products. The implication is for businesspersons to produce high quality of the cultural and traditional products that comply with Islamic practices.

Regarding activities preferences, most of Muslim tourists prefer to walk around the city, visit sights and attractions, go shopping, visiting museums, water sporting, day spa, trekking, health and medical spa, adventure activity, fresh water rafting and mountain climbing and golfing.


Generally, they have high satisfaction concerning accommodation, food and activities. They have a strong intention to revisit Thailand and to recommend it to others to visitors.

b. **Tourist Needs***:* There are three aspects of MFT needs: towards hotels, restaurants and public areas.

1. Regarding needs towards hotels, tourists expressed highest needs of Qibla direction, availability of halal food or restaurant in the hotel, conservative staff dress, banning alcoholic drinks in minibar at hotel room banning of nightclub and other inappropriate entertainments at the hotel, segregated swimming pools for men and women, banning of sex channels, and separate floors for male, female and family. The results could shade light on how hospitality industry could provide services for Muslim tourists.

2. On the needs towards restaurant, tourists demonstrated highest needs on the availability of Halal sig at Halal restaurant, conservative entertainment, availability of a variety of foods: Thai, Western and Arab, minded and friendly staff able to communicate in appropriate language, English menus, availability of waitress to serve female customer and waiter to serve male customer, and availability of private cabin for family dinning.

3. Regarding public areas, Muslim tourists needs are related to: the availability of Mosques, announcement of Azan indicating prayer time, availability of prayer facilities/rooms at tourism sites, airport and other public areas, available of first aids, Islamic financial services or banks, availability of security personnel or policemen, banning of gambling activities by the authority at public places, availability of family-appropriate beaches, and availability of private cabin at the beach.

The fundamental information for policy makers and business sectors to effectively develop, promote and deliver products and services that meet the unique demands of this new MFT market. There are close to 1.7 Muslims worldwide who are becoming more affluent and traveling with their families and friends. It is essential for Thailand to develop a concept for MFT Business. Furthermore, MFT will directly fulfill the Muslim needs. The Tourism Authority of Thailand projects a huge increase in Muslim visitors from the year 2016 onwards - particularly from the neighboring countries of Indonesia, Malaysia and Brunei thanks to an increasing interest in developing MFT hotels.

Thailand has always been a popular choice - especially for families traveling to Phuket with direct Emirates flights. Representatives from TAT identified the country's ability to cater to Muslim travelers by providing Arabic-speaking staff, Halal food options, prayer facilities at the airports, MF hotels and restaurants, and tourist attractions to its visitors.

In 2015, TAT has set the target of 28 million visitors generating an estimated US $40.1billion from international visitors. Source markets that are indicating growth trends are China, India, the Philippines, Hong Kong, the UAE, Singapore, France, Italy, the UK, Brazil and East Europe. ASEAN is expected to experience from 2016 onwards, a huge increase in Muslim visitors from member countries to the South, specifically Indonesia, Malaysia and Brunei Darussalam.

Thailand is building shopping complexes providing MFT facilities and Halal food, and investing to build MF hotels. Thai Airways has organized Eid packages around these destinations. Some firms promote Bangkok, Pukhet and Krabi Island as MFT destinations.

To help travel agents as well as direct customers consider Thailand as a favorable Muslim destination, TAT also launched in 2015 its first app designed specifically to make it easier to find MF products, services and facilities nationwide that will help Muslim visitors find mosques, halal restaurants and hotels, shopping centers with prayer rooms, and other facilities around the country. Initially to be in Thai and English, the app will expand to include Arabic and Bahasa Indonesia later.

Thailand Takes Serious Efforts to Grow MFT

With Muslims accounting for 240 million of the 600 million people in Southeast Asia, the region has extensively developed halal food production with progress seen in halal certification. Two Muslim majority countries—Malaysia and Indonesia —are among the world's top 10 halal exporters, concerted efforts by government and strong local supply chains. Thailand, where Muslims make up only about 6% of the population, is already one of the world's top exporters of food products and is looking to apply its expertise to halal products to tap into the higher purchasing power of Muslim populations worldwide.

Thailand aims to become one of the world's top five halal exporters by 2020. A huge budget will be devoted to improving manufacturing capability, speeding up certification, research and development and enhancing international marketing. It is a joint effort by the Industry, Foreign Affairs, Commerce, Agriculture, Tourism and Sports ministries. The country has already appointed a national halal committee and the five-year plan has been endorsed. It outlines strategies for targeted industries that include food and beverages, textiles and garments, cosmetics, medicine and herbs, restaurants, tourism, hospitals and spas.

Countries in ASEAN are trying to attract more Muslim tourists from all over the world by providing more facilities in accordance with religious beliefs. Malaysia, Singapore, Japan are all trying to woo Southeast Asian Muslims by increasing the number of MF hotels and restaurants. Muslim travelers are attracted by Thai hospitality, lifestyles and facilities available even though the country is not a Muslim nation. About 90% of Muslims tourists are coming to Thailand mainly for leisure and medical reasons. Thailand is offering a high standard of medical care, with easy access, cultural understanding, an Arabic-speaking medical teams. The high season for Muslim tourism in Thailand is June and July. The main challenge for MFT in Thailand remains the limited availability of halal food. According to Crescent Rating Agency, the halal hotel market is worth $140 billion at present with a projection to rise to $192 billion by 2020. The segment is relatively untapped with Turkey, Malaysia, Indonesia and Morocco among the biggest players.

Thailand Targets Muslim Travelers

Thailand is positioning itself as a MF destination by pushing MF tourism, launching and adapting marketing incentives for Muslim travelers, showing prominent Muslim landmarks or visiting Muslim communities in Thailand. Thailand's southern Muslim provinces bordering Malaysia, as well as incentives for Muslim travel agents and media to survey tourism products and services for Muslim tourists in Pattaya, Hua

Hin and Phuket, where Phuket is gearing up to be a halal food center. In nearby Krabi province, little known for being a predominantly Muslim area, is positioning itself as a premier destination for Muslim travelers.

TAT hopes to increase the proportion of Muslim travelers especially amongst the high-end and intermediate markets, as well as family and women groups. According to the MasterCard Crescent Rating Global Muslim Travel Index 2015, Thailand was ranked second within the most popular destinations for Muslim tourists from all over world (in the category of non-Muslim countries), behind Singapore and ahead of the UK. TAT is also focusing on source markets such as the GCC, especially the UAE, Kuwait, Qatar and Oman, as well as Iran, Egypt, Morocco, Tunisia and Algeria.

The Halal Science Center of Bangkok University, the Central Islamic Council of Thailand and Halal Standard Institute of Thailand joined forces and launched "Thailand Diamond Halal", a brand concept under which all halal products and services sourced in Thailand are marketed.

The brand concept can be adopted by hospitality companies, hotels and TO can ensure that, among other things, hotels are equipped with MF facilities TO can offer Islamic heritage tours and MF travel packages.

Thailand's MF Destination Strategy goes well beyond just Tourism

As one of Southeast Asia's largest Buddhist-majority countries, Thailand's efforts to attract Muslim visitors has a wider significance than just travel industry development. Thai government is mindful of building inclusive societies, preventing religious and ethnic conflict, and contributing to ASEAN integration. The strategy to position Thailand as a MF destination was launched in June 2015 at the Thailand Travel Mart Plus. This will allow creating jobs and promoting national inclusiveness and integration. Historically and culturally Muslims have been, for centuries, an integral part of Thailand. Islam is not only the second large religion in the country, but also enjoys royal and official patronage. Thai population of 67 million comprises 5.8 million (8.6%) Muslims as of 2013. There are 3,600 mosques nationwide, including 180 in Bangkok. Muslims enjoy full state support and free to teach and observe their religion.

Thailand is already one of the world's biggest food exporters to the OIC countries. Halal certification in Thailand was initiated in 1969. As of 2014, the HSIT has halal certified 4,000 factories covering 120,000 products (10% for export). On June 2, 2015, just three days prior to the TAT event, the Thai cabinet approved the Halal Development and Promotion Strategy for 2016-2020.

Presently, Thailand gets an estimated three million Muslim visitors a year. Of this, about 75% would be from Indonesia and Malaysia. There is strong potential to attract more Muslim visitors from India, Bangladesh and Pakistan, all of which are within four to-five hours flying time from Thailand. The next generation of Muslim visitors will flow from Central Asian Republics, North Africa, Europe, South Africa and elsewhere. Muslim visitors are both a quality and quantity customer segment.

TAT officials note that Thailand gets more direct flights from Islamic countries than any of its ASEAN neighbors, operated by Emirates Airlines, Etihad Airways, Qatar Airways, etc. Citizens of the following OIC countries can get 15- or 30-day visa-free access to Thailand: Oman, Qatar, UAE, Malaysia, Indonesia, Brunei, Saudi Arabia, Maldives, Turkey, Uzbekistan and Kazakhstan. Nationals of GCC countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE), can get a 90-day visa-free stay for medical treatment. The regulation also allows a patient to be accompanied by up three GCC nationals for the same 90- day period without visa.

TAT has produced a number of guidebooks and brochures to help Muslim visitors such as "Halal Check-in Thailand", which contains a list of halal certified restaurants as well as brochures on tourist spots in the southern provinces of Yala, Narathiwat and Pattani.

Broader development strategies

The MFT outreach fits well within Thailand's national and regional development strategies. A primary beneficiary will be South Thailand, home to 63% of the Thai-Muslim population. TAT also forecasts that Phuket and Thailand's Andaman coast will become one of the top destinations for Arab visitors. Hence, positioning Thailand as a Muslim-friendly destination will make a major contribution to strengthening the Socio-Cultural Blueprint of ASEAN Integration and boost intra-regional travel. Since the significant role of tourism in Thai economy has long been recognized. Thai government has granted various facilities to tourism agencies to develop other potential areas in the tourism industry. Developing MFT is a promising approach to attract more tourists. However, there is a need for Thai community and tourism related sectors to understand the unique Muslim travel behavior and needs.

Figure 10: SWOT Analysis for Thailand

STRENGTHS	WEAKNESSES
Political stability, preventing religious and ethnic conflict, and contributing to ASEAN integration, Extensive knowledge in MFT: spa tourism, healthcare related services, entertainment, etc. positioning itself as a MF destination by pushing MF tourism, launching and adapting marketing incentives for Muslim travelers, Skilled labor, Innovative and creative.	Lack of language abilities, Low level of knowledge and appreciation of other cultures.
OPPORTUNITIES	**THREATS**
second within the most popular destinations for Muslim Big market to ASEAN and GCC countries, as well as Iran, Egypt, Morocco, Tunisia and Algeria, getting an estimated three million Muslim visitors a year, One of the world's biggest food exporters to the OIC countries, Halal certification in Thailand was initiated in 1969, Thai cuisine.	Political disability, No real integration of services.

6. UNITED KINGDOM

Some General Data.

The United Kingdom is a popular destination among Muslim travelers and is home to a large percentage of Muslims; with majority of them living in England and Wales. Islam is the second largest religion in the country. Due to a long history with Asia and the Arab region, most cities have important Muslim communities consisting of many ethnicities, but the majority is of British-Asian origin. These cities have prayer facilities, although locating halal food might not be easy in certain areas. Most of the cities are MF and have adequate facilities. The following are a few of the top MF destinations in the UK (compiled by Halal Trip).

London, the capital of England, is one of the most visited cities in the world and is home to the largest Muslim population in the country. This cosmopolitan city draws visitors from around the globe including Muslims. London has a lot to offer to its many visitors: attractions, museums, galleries, parks and shopping centers. Muslim travelers visiting London can easily find prayer facilities; the city has many mosques and Islamic centers. Halal food is not difficult to find; there is a large choice of halal restaurants serving a variety of cuisines.

Bradford; located in Northern England has a sizeable Muslim population. It is easy to locate mosques as the city is home to over 70 prayer facilities. Bradford is the curry capital of Britain. Many Muslim owned restaurants serve a variety of cuisines.

Luton is a large town located north of London and is another MF destination in the UK. It has a sizeable Muslim population of diverse ethnic origins, but consisting mainly of Asian descent. It has also a wide concentration of Asian halal restaurants in Bury Park. The town has over 20 mosques.

Blackburn has the largest population of Muslims in the UK, outside of London making it another good destination for Muslims travelers visiting the country. More than 40 mosques are spread across Blackburn, and locating halal restaurants is not difficult.

Birmingham, the second most populous city after London, is ethnically and culturally diverse. The city offers to its Muslim visitors MF facilities: over 150 mosques, halal restaurants serving South Asian, Mediterranean and Arabian food.

Dewsbury, Leicester, Derby, Manchester and Liverpool are some of the other destinations that have a sizeable Muslim population; therefore offering their Muslim visitors many MF facilities.

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The UK is the second most visited destination by residents of the UAE with the number of visits doubling in the last ten years. Leisure visits predominately take place in July to September. London in particular is a popular destination for tourists- with shopping, entertainment and dining being the main attractions. UK has over 2.8 million Muslim people which is a large population for a non-OIC country. Table 20 provides the inbound tourism to the United Kingdom between 2010 and 2020.

Table 20: United Kingdom inbound tourism from 2010 to 2020.

Year (Inbound Tourism)	2010	2014	2020
Inbound Muslim Visitor Arrivals (Millions)	1,70	2,08	2,47
Inbound Expenditure by Muslim Visitors (US$ Millions)	2,442	3,312	4,058

Source: CrescentRating, 2015

Below are a few key points on Muslim tourist arrivals:

- The inbound Muslim visitors' growth was at 3.0 percent. Muslim tourist prefers travel to UK because it caters well to the basic needs such as Halal food and prayer facilities;
- By 2020, the total number of Muslim visitor arrivals will be 2.47 million. In 2014, Muslim arrivals were 2.08 million;
- By the end of this decade, a Muslim tourist average expenditure will surpass the US$1,642. This would be higher than the general tourist expenditure. Attraction, sightseeing and shopping are the key activities for tourist traveling to UK;
- In the next five years, as a percentage of total inbound, Muslim tourist will account for 8.4 percent of total arrivals. This translates into almost one in ten tourist traveling to UK would be a Muslim. Amongst all the EU countries this could be one of the highest percentages. Tourists from the Middle East strongly favor travel UK.

Faith-based needs of Muslim Traveler

a. Halal Food: Halal food is readily available throughout the country. Most local Halal restaurants and eateries in United Kingdom also maintain their own websites and have established a good online reputation. Furthermore, a few online directories are also available, providing Muslim travelers useful information on where to find Halal food. The two halal authorities are:

- The Halal Food Foundation (HFF), website (www.halalfoodfoundation.co.uk), is a non-profit, registered UK charity. Their aim is to make the concept of 'halal' more accessible and well known to the public through training schemes, workshops and educational material;
- The Halal certification body is one of the main sources of information, and
- Halalfoodauthority.com. Halal Food Authority (HFA) is an independent, voluntary, non-profit, organization operating as a commercial wing of a registered charity. Restaurants are beginning to display Halal logo to attract Muslims tourists.

b. Prayer Facilities: There are many mosques across the UK. London is home to over 345 Mosques and it is estimated that London probably has the largest number of Mosques than any other city in the western world. Birmingham comes next with over 154 Mosques in the city.

c. Ramadan Services: Ramadan services are well observed in the various Mosques. Iftar is provided to all. Younger Muslims prefer to dine with their friends at restaurants. This has prompted restaurants to start offering special iftar menus which includes a buffet.

d. Water friendly Washroom: Although this is not widely available, a few hotels are beginning to offer rooms with attached bathrooms that are water friendly, because tour operators started asking for this option.

e. No non-Halal Activities: Since the UK has a large number of bars and other such establishments for drinking as part of their culture, Muslim tourists are beginning to inquire if their hotel is located in close proximity to drinking places.

f. Recreational facilities and facilities with privacy: These are provided for male and female in a few selected hotels. However, this is not a wide practice offered by boutique hotels. Most hotels do not offer this service.

Table 21: UK Demand Side Analysis

	Demand Side Analysis
Leisure Travel	Leisure travel is the main tourist market of the United Kingdom. Shopping, entertainment and dining are a few key attractions. Growing availability of friendly facilities and services provided to Muslim travelers.
Business Travel	Muslim Business travel is growing rapidly, due to business opportunities. Fast growing market segment due to MICE (Meetings, Incentives, Conferences and Events) industry. Key market driver is the UK property market attracting Muslim business travelers. Growing number of Muslim Lifestyle events held now in the UK, like the Muslim Lifestyle Expo (MLE).
Healthcare Travel	The number of Muslim tourists traveling to United Kingdom for health tourism is growing at a steady rate. The UK has a well renowned healthcare industry, well-equipped hospitals and experienced healthcare professionals. The challenge is that the price of the healthcare facility in United Kingdom is higher as compared to that available in the neighboring countries of France and Germany. Both these countries' medical services and facilities could be as competitors.

Table 22: UK Supply Side Analysis

	Supply Side Analysis
a) Transport terminal services	**Airports, cruise terminals, railway stations, etc.** Most airports in the UK have multi-faith prayer rooms. However, no prayer rooms at major railway stations. There are a few Halal food outlets now at the major international airports in the UK.
b) Transportation services	**Airlines, cruises, railways, etc.** The UK adequately caters to the needs of the Muslim travelers flying into the country on the national carrier British Airways. Halal food is available upon request. Most long distance train services do not necessary offer Halal food options, although vegetarian choices are generally available.
c) Accommodation services	**Hotels, resorts, etc.** The UK has a wide variety of hotels, ranging from budget to luxury accommodation throughout the country. Some restaurants in hotels are offering halal food and receiving their groceries from halal certified suppliers. Some hotels and restaurants also offering Iftar meals. A few restaurants in five star hotels offer a wide selection of cuisine for the Muslim traveler in Ramadan.
d) Attractions & Activities	**Shopping, beaches, sightseeing etc.** The Muslim travelers, visiting an attraction in United Kingdom would generally find Halal food or vegetarian choices. Most do not provide prayer facilities. There is no discrimination by either the locals or non-Muslim tourists. Therefore, wearing the Hijab at tourist attractions in UK is common.
e)Travel agents/Tour operators	**N**ot many Tour operators are offering Muslim Friendly Tour packages to the UK. Only a few UK based outbound travel agents who offer out bound Muslim friendly packages.
f) Human capital	Although the UK is a non-OIC member state, there is a high knowledge about the Muslim lifestyle due to its long history with the Muslim World and its large Muslim population. Even non-Muslim staff in restaurants are fairly familiar with the special needs and preferences required by Muslim travelers. However, there are no structured programs to develop human resources specially to cater to the MFT segment.
g) Destinations	UK is a preferred travel destination by Muslims because of the following; - Variety of activities - Understanding and respect of the Muslim traveler - Good availability of Halal food with a significantly large Muslim population, especially in the cities of Bradford, London and Manchester. Many non-governmental organizations are supportive in attracting Muslim tourists into the country. Many restaurants are ensuring the availability of halal food all year round, in order to cater for Muslim visitors, especially from the Middle East. Moreover, a few cities with large Muslim populations in UK are renowned for a particular food theme. Luxury retailers are a strong attraction for tourists from the Middle East. The ability of many Muslim tourists from Middle East and Asia to speak English also facilitates trips to the UK. Leisure visits predominately take place in July to September.

Strengths and challenges for the UK's MFT segment

The UK has had strong tourism growth, especially since hosting the London Olympics in 2012. Due to its growing local middle class Muslim population, there are many Halal food outlets and Muslim friendly services across the UK. This has also meant that there is a steady growth of Muslim visitor arrivals to the UK. In 2014, Muslim Visitor arrivals to the UK accounted for 6.6 percent of the total arrivals compared to 6.0 percent in 2010. The key strength is its local Muslim population. UK has over 2.8 million Muslims people which is a large population for a non-OIC country. This has resulted in the development of a many Halal food and Muslim friendly services. It also has a number of Halal Certification bodies with some of the focusing on Halal restaurant certification.

Figure 11: SWOT Analysis for UK

STRENGTHS	WEAKNESSES
Long history with the Muslim World, Improved key standards in products and services, Consumers are granted more protections, Tourism supporting more jobs in UK,	Seasonality of MFT, Heavy burden on infrastructure and health services, Visa restrictions to visit the UK,
OPPORTUNITIES	**THREATS**
Long recognition of importance of MFT market in Tourism growth, Visitor growth from OIC countries, Brexit allowing UK to reestablish British laws on consumer protection more firmly,	Higher quality of products and services will be demanded in the future, across all tourism sectors, Other European competitive destinations, Landscape fragility,

7. SPAIN

Some General Data on the Challenge of Conquering the Growing MFT

The following general data are useful to understand the importance of tourism in Spanish economy: Spanish domestic expenditure has grown up by 2,4% in 2015, Luxury segment in Europe has grown up by 27% in the last three years, Tourism represents 61% of online trading in Spain, and MICE & Business travel has grown un by 7,7% in Spain in 2015.

MFT in Spain represents 4% of all tourism of the country in 2014, reaching 2.6 million tourists. Spain is the sixteenth country most visited by Muslim travelers and the country holds annually a large trade fair, Spain Halal Expo. However, according to the Muslim Travel Index 2015, Spain is ranked 35th in terms of suitable destinations for MFT, only surpassed in Europe by UK (ranked 25), France (31) and Belgium (32). The registered growth is 8.5% on annual average. This has led the Islamic Council of Spain, in collaboration with Innova Tax Free Group, to create the online platform Halal International Tourism (HIT). The aim of this platform is the international promotion of Halal tourism in Spain. In addition, according to estimates of the HIT, spending in this tourism niche of tourism will represent in 2020 13% of global spending on tourism.

The MFT is one of the segments that is growing, according to all forecasts. A total of 108 million Muslim travelers visited different countries in 2014, 10% of total displacement world, and it is expected to rise to 150 million 2020. In addition, Muslim travelers are of great interest to certain destinations for their high spending capacity. In 2014, they made a disbursement 133,000 million euros, and it is expected to reach 184,000 million in four years. Spain is one of the best-positioned countries to capture this market, thanks to its rich Islamic heritage and adequate infrastructure.

1.2 million Muslim tourists visited Spain in 2014 and in the first six months in 2015, 600,000, according to the Ministry of Industry, Energy and Tourism. In 2014, Spain was the preferred country among the top 10 destinations outside the OIC. It held the ninth position, ahead of Taiwan and behind the United States. In the first places, we find Hong Kong, Belgium, France, South Africa, UK, Thailand and Singapore.

Globally, including member countries of the OIC, Spain occupies the position 35, according to the Muslim Travel Index 2015, an indicator that values the suitability of a country to meet the needs of tourists.

Much of the writing on this case study on Spain refers the regions of Andalusia and Costa del Sol. Traditionally, Spain has offered an inclusive and melting pot of cultures, precisely the union between Jews, Christians and Muslims.

Andalusia continues to live beyond its Islamic past, "Granada, in particular, is a privileged place for the examination of the complex relationship of Islamic Andalusia and its past "(Calderwood, 2014). The ancient capital has not only the most famous resort of Alhambra, but also houses a large population of Moroccan immigrants and Spanish converts to Islam.

One of the most visible in Granada tourism initiatives related to the promotion Andalusian past found by the Andalusian Legacy Foundation, which was created in 1993. Since its inception, the mission of the foundation has been to focus on the appreciation and dissemination of the Spanish-Muslim civilization through its artistic and cultural events and historical and social relations with the Arab world, the Mediterranean environment and Latin America.

In addition to its activities inside Granada and Andalusia, the Andalusian Legacy Foundation has also promoted economic and cultural exchanges between Spain and the Maghreb by organizing exhibitions, conferences and tours in Morocco, Tunisia, Algeria and Mauritania. That is, have a few commitments to the Moroccan community of Granada or your community Spanish converts to Islam. considers that the main function of the foundation is " maintaining a network of palaces between Morocco and Spain, marked by the management resources and economic flows

The history of the common past in Andalusia has always been used as a link union between cultures, "in the belief that Spain can serve as an example to facilitate our acceptance of the other "(Calderwood, 2014), the bridge between Europe and Islam.

The case of Granada is the most analyzed and studied for its obvious relationship with Islam. Because of the similarities with other destinations in the Andalusian legacy our region is the most appropriate to get an idea of the current situation and the possible conditions that may arise in the implementation of MFT in Andalusia. The Great Mosque of Granada is the first large mosque to be built in Granada since 1492. It was inaugurated in July 2003, after 22 years of battles legal and political.

Even in 1994, UNESCO declared the Albaicin Heritage and described as follows "The Albaicín preserves a rich set of Moorish buildings harmoniously fused with traditional Andalusian architecture ".

MFT in Spain

The Alanda Hotel Marbella became the first hotel Halal in Spain. It meets the MF requirements. It was the first to be certified Halal by the authorized entity in Spain, created by the Islamic Council of Spain (ICS) based in Cordoba. It has become a symbol of cultural coexistence between "Western" tourism and MFT.

The Alanda hotel, with its 200 rooms and 4-star owned by NH Hotel Group as NH Alanda, but in November 2013 it was acquired by the Fawaz Al Hokair Saudi group. Marbella is establishing its first hotel property, but its intention is to open a number of hotels with the halal concept in other parts of Europe, which carry the brand Alanda.

The services offered by the hotel oriented Muslim market are primarily focused on a specific and very strict cuisine. Not only alcoholic beverages or pork offered, but makes sure that no products with traces of pork fat in any case, something that is common in pastries, yogurt or cheese slices. Even the hotel ensures that the fish has not been fed with prohibited food.

The hotel is also offering a prayer mat, the indication of the Qibla, and it is possible to rent a specific room to pray and request any specific service. Its offers are mainly based on service health and wellness, spa centered and beverage service, with fresh juices and non-alcoholic cocktails. families really like the absence of alcoholic beverages at the restaurant.

Spanish Initiatives to promote MFT.

Muslim tourists reached 2.6 million in Spain in 2014. According to the news published in Hosteltour.com on March 14, 2015. A total of 2.6 million tourists visited Muslim Spain in 2014, representing 4% of total international travelers received.

Moreover, Spain was ranked as the fourth best European destination appreciated by travelers, according to the Global Muslim Travel Index developed by MasterCard and CrescentRating. Spain has been placed among the top ten destinations outside OIC

In addition, according to the Global Muslim Travel Index, Spain has been ranked fourth as the fate of Europe most valued by these tourists, taking into account aspects such as services, facilities, accommodation options, and security.

Globally, including member countries of the OIC, Spain occupies the 35th position in a ranking led by Malaysia, Turkey, UAE, Saudi Arabia and Qatar.

Cordoba has taken the initiative to try to become a benchmark in Europe in Halal production. The own city council is leading the initiative to try to turn Cordoba benchmark in Europe in producing halal. The initiative involves implanting in the city a business park dedicated to this sector of the economy with a strong export vocation and service.

Of the 819,494 visitors it receives Córdoba per year (reference data of 2012), it can be expected that as a result of tourism development halal and everything related to the cluster / business park, this number will increase by one million additional visitors between 2015 and 2020, about 204,054 new visitors a year." This is one of the conclusions of a feasibility business study drafted by the Catalan consultant Idencity Consulty.

Cordoba has all the elements to host a global halal cluster similar to that was introduced a few years ago in Malaysia. In the last Global Economy Islamic Summit, held in Dubai, clear figures offered: only Muslim consumers in 2012 spent more than a billion dollars in food, equivalent to 16.6% of overall spending on food made this year.

A cluster in Andalusia would be the concentration of all the elements that are necessary for the implementation of the production of MF goods and services. The experts, pointing to Cordoba, Malaga and Granada triangle would be the ideal place to implement this business conglomerate, because they retain strong cultural and economic ties with the Muslim world.

The First Halal International Conference 2015 was held in Cordoba on March 24-25. Córdoba is aiming to become the Halal capital of Europe. Spain has many future opportunities. It is true that it is not easy to find many restaurants with halal food. However, Spain has enormous potential to develop MFT services, but also a long road ahead. The Muslim tourism turnover of 1,000 million euros in the world in 2012

Halal Certification in Spain

In Spain, one of the bodies responsible for the certification of halal products and services is the Halal Institute, belonging to the ICS. This certification guarantees that the products and services marketed conform to Islamic rules collection in the Qur'an, as well as the current national regulations.

In Spain there are more than 200 companies certified, a total of 300 products certified as halal. The Halal Institute is approved and recognized worldwide for several body and works in coordination with Muslim federations, Islamic communities and associations, representing consumers, the Islamic Cultural Center of Valencia, Vida Halal, etc. for normalization of halal food and general lifestyle of Muslims in Spain. Furthermore, since November 2013, the Spanish Association for Standardization and Certification (Aenor) began collaborating with the Halal Institute, leading thus the new standardization activity on the Halal aspects of the food chain that have begun in Spain.

There is another brand of accreditation of halal food, created in 2012: the brand Halal Food & Quality which is a registered trademark patented recognized and legally protected. Halal Food & Quality is linked to the Higher Islamic Council Federation.

The city of Valencia member of the Islamic Commission of Spain.

Initiatives and Strategies to promote MFT are:

MF hotels adapted for Muslims.

The food is definitely the most important factor. Given the possible mistrust of Muslim visitors, managers and staff have to be able to present the documents certifying the origin of food, or have the halal certification. There are other aspects such as prohibition of alcohol, gambling on gambling and prostitution. As for leisure, "friendly" TV, as well as the option of gym, pool or spa.

There is currently a poor compliance with the requirements of MFT. The adaptation of Spanish tourism could allow some growth in number of very significant short-term visitors, and promote sustained. Trust is of utmost importance in MFT. Muslim customers are loyal customers. If their demands are met, confidence will follow.

For destinations having Muslim heritage, the opportunity to develop an Islamic focused market is huge. Spain can use its historical appeal to strengthen MFT industry.

Spain has also started initiatives in cities such as Cordoba, Granada, Malaga, with large Muslim heritage, used to being recipients of tourism, so they have the necessary infrastructure, the only thing missing is the adaptation of such infrastructure and facilities to Muslim tourists with different characteristics and needs. A potential client is a very small tourist and beginning to open to the world, begins to travel and already today is experiencing an exponential increase in tourist spending.

By 2020, 14% of trips international will be done by tourists Muslims, according to a report by DinarStandard at ITB Berlin Fair last month of March. Asked what was most important for them at the destination, 67% indicated in response putting halal food, prepared according to the pre-concepts of the Koran. 53% traveling with family, 23% with friends and 19% with their wives.

Moreover, the estimated DinardStandard Muslim tourists spend almost 98,000 million euros in trips a year and the forecast is reaching 149,000 million euros in the year 2020, 52% more than now.

They remain in the place they choose for periods above average. So far, the favorite destinations of tourism issuer have been Muslim Egypt, Malaysia, Turkey and United Arab Emirates. Although other destinations such as Australia or New Zealand and UK are adapting their tourism promotion to such rating.

Spending by Muslim tourists will increase 52% until 2020. With the growth of this market, increasing tourism companies, especially chain hotels are committed to developing establishments.

Spain will strengthen its tourism promotion in the GCC market. Emirates Airlines planes connect the airport of Barcelona, improving connections between these countries and Spain.

Thus, the promotion will require putting into value the cultural and natural heritage of Spain and the different possibilities of Spain for tourism business, one of the segments most sought after by these tourists, in addition to shopping. The Government is also committed to expedite the issuance of tourist visas in the Gulf countries.

Tourists from the Middle East are the biggest spender visitors in hotels of Spain throughout 2012, with an average of 145 euros per day. As a comparison, Japanese tourists stood second with an average spending per room and per night of 121 euros per room per night, while Australian travelers were third with 119 euros.

Promoting Spanish tourism in the GCC countries is planned and coordinated,

Increasing flights from Dubai and Qatar to Madrid and Barcelona is having a catalytic effect. "We have a double daily frequency with Emirates airline direct flight to Madrid and Barcelona daily since the summer of 2012. The flight occupancy is 75%".

Spain is very well perceived by passengers who see it as a very good holiday destination. These are families especially upper-middle and upper class. Although, Spain as a fashionable momentum has not yet reached its fullness. The destinations of greatest interest are Costa del Sol and Andalusia as classic destinations (Al-Andalus Route), Barcelona and Madrid. Spain also stands as a destination for young couples and honeymooners.

Another factor that helps the commercialization of Spain is the ability to combine several destinations in one trip, for example Portugal and Morocco. The advantage the Schengen visa gives allows them to discover several destinations within Europe.

There are various motivations: visiting cities with a combination of traditional and modern culture, art, gastronomy, shopping, nature, sports, beaches and of course the Arab legacy. Spain is positioning itself as a destination where Muslim tourists can find culture, heritage, history, architecture, art, Islamic traditions, natural beauty and the 'romance' of Spain". There is also a high interest in leisure.

In short, what Muslim travelers expect in Spain can synthesized in several sections:

gastronomy; football; climate; security; the Arab legacy; the coastline; shopping and overall affinity with Spain, which is perceived as the most open European destination in the Arab world.

Figure 12: SWOT Analysis for Spain

STRENGTHS	WEAKNESSES
Strong presence of Islamic Culture Spanish cuisine famous worldwide Air connections with Arab and GCC countries Meeting MT expectations: gastronomy, football, climate, security, Arab Legacy, coastline, shopping, Romance, etc.	Still poor compliance with MFT requirements
OPPORTUNITIES	**THREATS**
Many Arabic words in Spanish Places, cities, etc. having Arabic names Announcement of plans to intensify MFT promotions, especially in GCC countries, Proximity of other European countries and Morocco.	Sometimes disappointing welcoming, Quality of accommodation services, Lack of practice of foreign languages, Deterioration of landscapes.

8. NEW ZEALAND

Tourism is a rather new economic activity in New Zealand. Domestic and international tourism combined are a $23.9 billion industry, $9.8 billion of which is export earnings. The second largest export category after dairy, tourism is integral to New Zealand's economy. It directly supports 110,800 jobs as well as many small businesses all over the country, including in retailing, accommodation, F&B services, arts and recreation. Tourism leverages some of New Zealand's major assets, the scenery and cultural heritage, particularly the cultural heritage of Māori.

Tourism impacts the wider economy in less visible but equally important ways. Beyond their direct contribution to the New Zealand economy, international visitors to New Zealand play a vital part in bolstering airfreight capacity. More passengers flying in and out of NZ provides more opportunities for businesses to get their high-value and perishable products to the world. It is the case of tourism. Tourism is not simply about numbers of visitors, but about the value of each visitor to the NZ economy. The booming MFT niche could be very profitable on that level.

New Zealand is being encouraged to tap into the lucrative and growing Muslim tourist market. In 2014, a symposium has been held in Hamilton to promote halal tourism, approved to meet the beliefs of the Islamic faith. With tourism in this country focusing on other markets, particularly China, tourists from the Islamic world have been virtually ignored. Malaysia and Indonesia are seen as the best countries to start promoting New Zealand as a destination.

In recent years, Muslim tourism in New Zealand has been growing steadily. In August 2012 alone, the number of Muslim visitors to the country was up by 141 percent, compared to the same month in 2011. According to Tourism New Zealand, Muslim tourists' expenditure is expected to rise to more than 13 percent of the entire global tourism expenditure by 2020. As Muslim travelers are increasingly changing their tourism preferences. (New Zealand Launches Halal Tourism Guide Relax News, 6 October 2012)

In this case study about the current situation of MFT market in New Zealand, we have relied mainly on academic documentation, mainly a Ph.D. thesis on the development of MFT in the country. There are many MF accommodation providers in New Zealand. There are two Halal attributes mentioned by accommodation providers on their websites, whilst the majority of Halal attributes are not mentioned on the websites. Other attributes are mentioned more on the websites such as the availability of a pool onsite and having multilingual staff. More accommodation providers willing to provide MF attributes. Some accommodation providers' lack of knowledge of MF was and some accommodation providers mentioned that they would not provide Muslim guests with services they might need.

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.

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). New Zealand Tourism and Christchurch International Airport have launched a new culinary tourism guide focusing on meeting the needs of Muslim travelers. Willing to capitalize on NZ's geographic position, close to some of the world's largest Muslim populations like Indonesia, Malaysia and Singapore. The guide provides general tourism information as well as a list of Halal classified restaurants and cafes including Halal-certified and vegetarian cuisine. The guide was distributed among TA and their customers as well as NZ embassies offshore. As part of the program, the agency started offering a series of workshops for the tourism industry, aiming at providing information on how to meet the needs and expectations of the MFT market. Some hotels have women-only beach areas with Islamic swimming suit, the burqini.

However, given the limited research that has been undertaken on MF hospitality and accommodation in New Zealand, there is a need to investigate the Muslim-friendliness of New Zealand's accommodation providers to see the extent to which it is possible to cater to this market.

Our purpose here is to uncover the status of New Zealand accommodation providers in terms of Muslim friendliness and explore which MF attributes are available to the Muslim tourist. Content analysis of accommodation websites is carried out, along with an inquiry into the curriculum of New Zealand tertiary institutions. The websites of accommodation providers are analyzed to explore the provision of the attributes a Muslim tourist requires whilst lodging in New Zealand.

The Role of Websites in Communicating MFT Attributes

New Zealand accommodation providers are heavily relying on the Internet. Communicating on the availability of MF services is considered as essential in attracting Muslim tourists. Digital media is becoming an important step in the consumer decision making process (Phelan et al., 2011). However, the majority of NZ websites analyzed do not mention their ability to cater to Muslim tourists. Only three of the 364 websites analyzed mention the availability of halal food, all of which are 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).

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 MFT 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 travelers. From the outset, the lack of accommodation websites outlining MF 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 travelers. Only two Muslim-friendly attributes were mentioned on the websites analyzed, which were the availability of halal food on-premises and gender segregated facilities. However, only three hotels mentioned that they have halal menu items.

Preparedness of the Accommodation Industry for MFT

Some accommodation requirements are critical to attract Muslim tourists. For example, the availability of gender-segregated facilities (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 lack of such facilities hinders accommodation providers' capacity to target Muslim travelers and hence raises pertinent questions concerning New Zealand's hospitality industry preparedness for visitors from Muslim countries.

Nevertheless, despite the absence of formal information for Muslim tourists, these attributes provide the foundation for building a hospitality industry that is active in attracting Muslim tourists and catering for Muslim and non-Muslim travelers.

Provision of such information regarding non permissible attributes would not only inform prospective Muslim travelers 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 prospective travelers to make the right decision when choosing accommodation options.

The Gap between Online information and Actual Service Delivery

The Federation of Islamic Associations of NZ President said that, until now, TA and TO had thought the MFT market was just too hard to deal with, it was perceived as something burdensome, so they automatically reacted by ignoring it. While in fact, the needs of Muslim visitors were quite simple and included halal food and a place to pray.

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 (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 MF attributes on request emerged as a recurring theme during the data collecting stage. Accommodation providers that were willing to offer MF 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 potential Muslim tourists would know this when at the initial stage of an accommodation selection. Some accommodation providers also indicate that they would charge the guest more for the provision of MF attributes.

The lack of knowledge as to what constitutes MF 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 MF requirements (see Bon and Hussain, 2010; Hashim et al., 2007) or that they have a Muslim person on their staff who would be able to assist. The availability of Muslim staff to assist Muslim tourists is also an obstacle.

Many accommodation providers in New Zealand are able to provide some Muslim-friendly services, but this fact is not conveyed on the accommodation providers' websites. The absence of available information regarding MF attributes would require Muslim guests to take further steps in order to ensure their needs can be catered (Marranci, 2012).

In order to accommodate Muslim guests, many accommodation providers need to familiarize themselves more with the MF procedures and practices (Hashim et al., 2007) to be able to deliver a quality service that is MF and be able to address any concerns Muslim guests might have with a service correctly. The need for such awareness is real (Wong, 2004, and Skogland and Siguaw, 2004). However, there appears to be no clear mechanism by which accommodation providers can do this. There is little New Zealand specific advice in terms of MFT information for providers there is only limited information on Tourism New Zealand, Regional Tourist Organisation or Qualmark websites.

Despite interest in attracting more Muslim tourists to NZ, an examination of hospitality education in NZ suggests that students training in the culinary arts at most of NZ's tertiary hospitality providers are not being given significant amounts of training in the techniques of halal food preparation.

Hotel Ratings and Attributes

Hotel ratings are meant to be based on the attributes and services provided and could influence the expectations of some potential lodgers (Rhee and Yang, 2015). Most accommodation providers rating do not have a significant influence on the availability of MF attributes, however the availability of non MF 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.

The availability of most accommodation attributes were not influenced by the establishment's TripAdvisor rating. An accommodation provider's average TripAdvisor rating was higher amongst establishments that do offer MF attributes. This may potentially be helpful to Muslim travelers who are planning a future trip to New Zealand (Barreda and Bilgihan, 2013).

In NZ, most of the MF attributes are not mentioned on the accommodation providers' websites. However, accommodation providers revealed that they do offer or are willing to offer some MF attributes. Muslim travelers in New Zealand are required to contact the accommodation provider directly in order to ensure they will be supplied the attributes needed. An inquiry into the availability of halal food revealed that Halal food preparation is not offered by many tertiary institutions in NZ, whilst other institutions' curricula discuss Halal food preparation briefly and do not delve in-depth into the complexities of the Halal food requirements.

Accommodation providers in NZ are aiming to cash in on the MFT segment; NZ is making efforts to attract Muslim travelers to its shores. Therefore, accommodation providers and destination marketers should take into consideration several managerial implications.

Marketing and Promotion of NZ as a MFT Destination

New Zealand needs to promote itself to Muslims around the world as a MFT destination. Academic research has shown that very little information is available to tourists on accommodation websites. This negatively affects Muslim travelers' decision-making processes. To improve destination selection, Tourism New Zealand can follow the example of Tourism Australia (Halal Trip, 2015) and co-produce with Halal Trip a Halal guide to the country to highlight its natural beauty, attractions, and the MF amenities including Halal food outlets available to Muslim travelers. As a comparison, in 2012, Australia's Queensland Office of Tourism advertised the Gold Coast as a place to spend Ramadan, with the phrase "Why not try Gold Coast for a cooler Ramadan this year?"

The lack of MF 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 travelers segment. Accordingly, another recommendation to MANZ 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. In addition, 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 MF services on accommodation providers' websites would help Muslim tourists make an accommodation decision when planning their tour (Carr, 2011; Ram et al., 2014; Ram & Hall, 2015).

B&Bs can promote the ability to provide Halal food and Qibla markers upon request. Motels can emphasis that their rooms have kitchens, which would enable Muslim travelers 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. Accommodation providers can package their products to satisfy the requirements of Muslim travelers in general. However, targeting this segment of travelers will require accommodation providers to consider religious needs holistically, taking into account all requirements of MFT.

Accommodation providers and tourism professionals in NZ are advised 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 Muslim clientele 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 MF place and a must visit destination. Limited knowledge exists among accommodation providers on MF practices in the accommodation sector worldwide. There is a real 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 MFT and the needs of Muslim tourists. There is also a need to train their staff in cultural and religious norms and practices.

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. This in turn would help attract Muslim tourists to choose the accommodation provider employing staff well versed in MF practices. Positioning of New Zealand as a MFT Destination can be summarized through the following figure.

Figure 13: NZ SWOT Analysis

STRENGHTS	WEAKNESSES
Huge touristic potential to develop MFT in NZ: Spectacular landscape, Natural beauty, diversity, exotic appeal, cultural heritage of the Maori, etc.	Muslim tourists have not been identified as targets for value, No explicit strategies on targeting the MFT segment Poor knowledge of MFT requirements, Lack of information on websites, Lack of offer of MF accommodation and food, Lack of promotions, Staff not trained to meet the MF requirements.
OPPORTUNITIES	**THREATS**
Growing travel markets to drive tourism growth, NZ trying to improve its positioning worldwide in the field of tourism, Like the Chinese market, the MF market is emerging, especially from the GCC and South East Asia regions.	NZ missing the opportunity to position itself on the MFT market and segment, especially when it is trying to improve its competitiveness, Other emerging economies are on the same track. Indonesia, India and Latin America have been identified as long-term high value targets, Australia, the neighboring country is doing better to attract Muslim tourists.

There is a missed opportunity for NZ to position the destination in the growing market of Muslim Travelers. Unlike Australia that has taken an active step in producing a halal guide, tourism authorities in NZ are lagging behind in formulating clear segmentation, targeting and positioning strategies in markets such as Malaysia and Indonesia to attract Muslim travelers. As competition to attract the increasingly discerning Chinese travelers intensifies, it may be worthwhile for NZ to put some resources into attracting Muslim travelers. Differentiating the destination from other Western destinations would also be required to attract Muslim travelers. 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 MF.

Product and Service Development

From 2012 on, strategies to target the Muslim segment of travelers became more explicit. It would be economically profitable to design more products and services aimed at this group. Many establishments express 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. Nevertheless, some TA and TO recognized that New Zealand was well behind many countries, including Australia, in promotion to the MFT market. Tourist operators were also told not to ignore the 50,000 Muslims living in New Zealand or big Muslim populations in other Western countries, including more than seven million in the United States. Muslim visitors, especially from GCC and ME countries, have a massive spending capacity.

PART VI

CONCLUSIONS AND RECOMMENDATIONS

In this final part of our study, we shall start with this comparison of the main findings from the eight case studies.

Figure 14: Comparing the eight case studies.

OIC MEMBER STATES	NON OIC MEMBER STATES
MALAYSIA **Aggressive strategy** in targeting Muslim market, efforts through large-scale campaigns and smaller businesses. **Comprehensive offerings**: Making MFT a priority, positioning as an Islamic hub, early understanding of MFT opportunities, activating the whole industry to suit MFT, aggressive branding in MFT market, developing new Islamic products and services, making Muslim travelers aware of offerings, implementing basic services, facilitating access to the country, training programs for staff, etc. **Malaysia's MFT goes beyond** the food and drink sector, including Halal logistics, Halal fashion, and strongly driving other regions of the country.	**THAILAND** **Thailand targeting of Muslim travelers**: Positioning as a MF destination, ranked second most popular destinations for Muslim tourists, focusing on source markets (GCC, ME and NA) **Thailand's MF destination strategy goes beyond tourism:** Thailand is a big food exporter to OIC countries. Thailand gets over three million Muslim visitors a year. Muslim visitors are both a quality and quantity customer segment. Extensive knowledge in MFT: skilled labor, innovative and creative tourism industry, targeting ASEAN and GCC markets. However, there seems to be **no real integration of services.**
INDONESIA MFT recognized as an opportunity market. **Strategic Initiatives to implement MFT:** wide range of tourism experiences, availability of MF facilities, well-developed attractions and entertainment, shopping and outdoor activities, many emerging MF hotels, family Islamic tourism and general ability to cater to Muslim tourists needs. Branding and positioning in MFT: engaging news media to increase awareness, developing MFT infrastructure, organizing themed campaigns for Muslim families, etc. Efforts to entice foreign investors, mainly potential developers from GCC countries.	**UNITED KINGDOM** **Strengths and challenges for the UK's MFT segment:** Steady growth of Muslim visitor arrivals to the UK, development of Halal food and MF services. UK has improved key standards in products and services, and in consumer's protection. Long recognition of MFT market importance in Tourism growth. Muslim visitors' growth is from OIC countries. However, higher quality of products and services will be demanded in the future, across all tourism sectors. Other European destinations are becoming more competitive.
TURKEY **MFT Industry in Turkey:** Tremendous efforts to boost tourism: planning and infrastructure, recognition in European and Russian markets, promotion activities, increase in tourist numbers, product diversification, and intensification of MFT. Crucial role of Internet activity in branding the country as a MFT destination. **Strengths of Turkey:** Development of its middle class, and consequent design of different types of markets. Culturally present in Arab and GCC region, thanks to its cultural industry products. Geographically, close to Europe, to Arab and	**SPAIN** **Initiatives to promote MFT:** Halal Certification, adaptation of hotels for Muslims, stronger promotion of cultural, historical and natural heritage of Spain, easy issuance of tourist visas to GCC. Tourists from GCC and ME are the biggest spenders. Planned and coordinated promotion of Spanish tourism in GCC. Increasing flights from GCC region to Madrid and Barcelona. Well perceived as a holiday destination by Muslims, meeting many MT expectations, and announcing plans to intensify MFT promotions. Being close to European countries and Morocco

GCC countries. It is implementing most MFT requirements.	is another advantage. Nevertheless, Spanish compliance with MFT requirements is still poor.
UNITED ARAB EMIRATES Visitors principally from Arab and GCC, Europe and Asian countries. Emirates airlines is a major contributor to tourism growth. Other LCC are developing. **Strengths and challenges for MFT segment:** Taking advantage from political stability and economic wealth, being a very popular tourism destination, attracting families and MFT, and being a leader in Islamic finance. Dubai positioning as the Islamic Capital of the world. Governmental steady efforts to promote tourism and travel. Tourism encompassing all types: leisure, business and healthcare. UAE hosting numerous world tourism events.	**NEW ZEALAND** **Huge touristic potential to develop MFT**, trying to improve its positioning. Like the Chinese market, the MFT market is emerging, especially from the GCC and South East Asia regions. However, MFT segment not yet identified and targeted, and no explicit strategies. Poor knowledge of MFT requirements, staff not trained, thus impacting quantity and quality of offers. **NZ missing the opportunity** to position herself on MFT market. Australia is doing better. No explicit strategies to target the MFT segment in NZ. Although this would be economically profitable.

In recent years, the MFT industry has continued to evolve and is becoming more challenging for OIC Member Countries. The MFT market is currently offering them a huge opportunity. OIC destinations have unique inherent strengths to cater to this segment. These strengths could allow capture a major share of the Muslim visitor arrivals. However, with increasing competition from non-OIC destination, it is obvious from the study that OIC member states need to accelerate the development strategy and execution to be leaders in the MFT segment. At the end of this study, we can formulate certain conclusions and recommendations related to areas covering directly the MFT sector. Their implementation will allow OIC member states to better position themselves in the MFT market and gain a higher share of the Muslim visitor arrivals. These recommendations can be classified in three categories.

Figure 15: The three types of recommendations.

Systemic and Sub systemic Recommendations	Marketing Recommendations	Technical Recommendations
1 Dealing with Systemic Variables 2 Maximizing the inherent strengths of OIC member states 3 Developing a MFT Alliance 4 Developing a Global and Comprehensive MFT Policy 5 Governments Involvement 6 Investing in Tourism Industry in countries receiving high inbound Muslim Tourists 7 Enhancing Research on MFT 8 Developing an environment for innovation and entrepreneurship on MFT related products and services	9 Marketing Challenges 10 Setting an overall MFT market goal to encourage growth in the MFT sector in OIC member states 11 Capturing opportunities in the niche sub-segment within MFT 12 Implementing and streamlining the basic MFT related services 13 Targeting Muslim Minority Countries 14 Developing healthcare services and facilities for the Muslim market	15 Standardization of Certification System. Increasing awareness of the MFT market among the travel industry stakeholders 16 Developing Handbooks and Guides 17 MF Airlines and Airports 18 Staff Policy 19 The Role of the Internet in Marketing MFT 20 Developing MF Applications

SYSTEMIC AND SUB SYSTEMIC RECOMMENDATIONS

1. Dealing with Systemic Variables

By systemic and sub systemic variables, we mean the following set of policy recommendations, both at the OIC cooperation level and the national levels, that would lead to create a favorable environment conducive to effective and efficient PPPs for the development of a sustainable MFT sector in the OIC countries.

At both levels, some constraints are a critical challenge to tourism planning and destination marketers. However, this could be an opportunity for businesses to use their creativity and flexibility in catering to the different needs of Muslim and non-Muslim. MFT practices and activities have been heavily affected by the political environment in ME. The Arab Spring has affected the outbound tourists from Middle East. Although the Arab Spring proved beneficial for tourism industry in UAE, Turkey and Malaysia, where an increase in demand was recorded for hotel rooms from Yemen, Syria, Iraq and Libya. However, the number of Muslim tourists could be affected in terms of inbound tourists to non-Muslim countries. Another challenge is the fall in oil prices. It could be a short run challenge but it is one of the obstacles that affect MFT market. Moreover, using social networks and proper geographical marketing programs is one of the challenges in this market. The fast process of information dissemination of MF destinations through social networks or geographical proximity is still very weak. The geographical marketing programs should be designed and disseminated in places where the majority of Muslims are located, both in non-Muslim and Muslim countries. These programs should be designed for strict adherents as well as for general Muslim tourists.

2. Maximizing the inherent strengths of OIC member states

OIC member states have rich Islamic history, Islamic heritage and Islamic elements of providing hospitality. The countries which have the richest Islamic heritage could do more to promote these destinations to the MFT segment, implementing the following to maximize this strength:

- Developing plans to identify, develop and promote all potential Islamic heritage/historical products, such as mosques, gardens, forts, monuments, landmarks, museums, educational centers, etc. ;
- Initiating educational programs/tours around the topic of heritage sites, Islamic educational training programs, conferences and youth-centric educational programs to further attract the younger Muslim travelers seeking Islamic knowledge;
- Developing OIC wide guidelines for Mosque tours ;
- Developing programs to attract Muslim tourist both from OIC and non-OIC countries during Ramadan ;
- Targeting the Umra market for stopovers;
- The aspect of sharing of food among Muslims is a very important feature of their social life and could be built into local experience “tourism product”;
- Developing local precincts/enclaves which have an Islamic/Muslim influence as a “tourism products”;

In terms of the leisure segment, the OIC member states have not fully exploited their inherent strength of having a Muslim friendly environment. These include better productizing the Islamic history and heritage sites/attractions. These are unique strengths of OIC member states that will attract the Muslim visitors.

For the supply side themes, the offerings of MFT by OIC countries are inconsistent. OIC member states should adopt wide guidelines concerning the services to be offered at airports, transport terminals, transport services, accommodation services, attraction and activities.

3. **Developing a MFT Alliance**

On a regional level:

TA and TO can play a key role in enabling the growth of the MFT market. However, their current focus in OIC member states is primarily concentrated on outbound travel. Further, the few players who are focused on inbound MFT market are SMEs. Their tour package offerings are also not consistent and they cannot compete with global players when they enter MFT market.

In order to strengthen this area the following actions are recommended:

- Launch an alliance of TA/To in OIC countries targeting the MFT market.
- Develop programs to help offline travel agents in OIC member states to go online and integrate new technology;
- Implement a program to educate the TA and TO to market the MF products of the destination;
- Develop suggested MF itineraries for Muslim travelers for each of the OIC destinations as well as multiple OIC destinations;
- Convert them to sellable tour packages with the help of TO.

On a sub-regional level:

There is a need to encourage the promotion of alliances between private tourism stakeholders in the OIC countries. Particularly, the official tourism promotion bodies need to strengthen tourism marketing and promote cooperation.

4. **Developing a Global and Comprehensive MFT Policy**

With the exceptions of Malaysia, Indonesia, Turkey and the UAE, very limited efforts have been made by OIC member states to reach out to the Muslim travelers with a clear MFT centric destination positioning. This requires the development of a comprehensive plan to position and promote OIC destinations as the choice destinations for Muslims, especially the leisure travelers. This entails branding, content development and promotion as suggested below:

- Develop a unique branding/slogan targeted at the Muslim Market;
- Position OIC member states as a MF holiday destinations;
- Convey the message of OIC destinations as providing a unique experience for Muslims travelers and hassle free destinations when it comes to faith based needs;
- Utilize an OIC wide slogan as well as a destination specific slogan.

Apart from a few OIC countries, the status of online information and website are not state of the art. All OIC member states need to enhance the information/marketing content including Muslim visitor guides for both online and offline use.

5. **Governments Involvement**

Strong commitment and efforts by the OIC Governments to strengthen the MFT industry are needed. State level programs and planning have to be in tandem with the national strategies and initiatives in order to benefit from synergistic advantages. Perhaps both the public and private sectors should review their strategies on how to create uncontested market space through value innovation and unleashing new demand. Frequently enough, one-day conferences or seminars examining how OIC can contribute to encourage travel within member countries, should be organized. Governments should provide incentives to the corporate investors to encourage them to enter PPPs agreements with the government in MFT projects, and to support capacity building programs. They should also ensure effective coordination, provide technical assistance and introduce/develop financial modalities for these projects.

It is also recommended that governments involve in PPPs, especially if tourism projects are financially or technically difficult to implement. Government and private sector should consider the following factors in managing successful and sustainable PPPs: shared leadership between both sectors, well-defined goals, a long-term commitment, realistic expectations, identification of respective benefits, flexibility, and economic, social and environmental sustainability.

6. **Investing in MFT Industry**

The numbers of MF hotels and resorts are still limited in non-Muslim destinations. Therefore, this is a business opportunity for further investment in tourism industry, especially in countries with high inbound Muslim tourists. Education syllabus and training programs are needed in hospitality industry to understand MF issues and this could be an opportunity to universities and training centers to offer such programs. MF medical and healthcare tourism could be a potential area that needs more attention for non- Muslim destination targeting Muslim tourists. Thus, joint programs and promotional materials on tourism investment opportunities in the OIC countries should be developed and made available to OIC and non-OIC countries around the world.

To implement their projects, particularly related to infrastructure development, the OIC countries can benefit from the facilities of the IDB Group and other relevant OIC institutions. It is recommended that governments develop effective political and legal frameworks to efficiently protect investors' rights.

7. **Enhancing Research on MFT**

It is necessary to conduct academic research on MFT. Perhaps qualitative followed by quantitative research to develop MF destination criteria is recommended. MFT tourism is a new area of research and more research on how to make non-Muslim destinations friendly for Muslim tourists is needed. The perceptions of non-Muslim towards MFT tourism could be a potential study to be conducted in Muslim and non-Muslim destinations.

Additional research is needed to observe the relationships between the Halal certification practices towards organizational performance. In order to enhance the validity and generalization of presented findings, future research could expand the scope to different hotels, organization or industry. Besides that, it is recommended that it would be better if future researches could also use the qualitative approach such as interview for data collection. The future research may also include testing of other variables which might have significant effects on organizational performance such as packaging, labeling, advertising and legal requirement.

Being the training and research body of the OIC, SESRIC can develop and introduce capacity building and training programs in the OIC countries in the field of MFT, facilitate the transfer and sharing of knowledge, experience and best practices among the member countries.

One of the serious limitations in several studies on MFT 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. Language was also a problem when contacting some accommodation providers to whom English is a second language. This might hinder the accuracy of the information given.

An obvious first recommendation is to use different research means such as the conduct of a survey, the hosting of focus groups, and/or interviews to gain further understanding of accommodation providers and gauge their knowledge and willingness to cater for Muslim tourists. A second suggestion is to conduct comparative research between countries and/or regions in order to explore the Muslim-friendliness of accommodation providers internationally and compare results. A further suggestion is to undertake more observational and ethnographic type research. Interviewing accommodation providers will allow an in-depth look at opportunities and barriers into providing MF attributes to Muslim guests from their perspective.

8. **Developing an environment for innovation and entrepreneurship on MFT related products and services**

The environment in which tourism companies operate today is rapidly changing and becoming more complex and more competitive. New technologies have created new industries and disrupted old ones. The "sharing economy" players like Airbnb and Uber are disrupting business models. OIC member states need to become innovators in this space. Either at OIC level or at national level, they need to initiate programs to encourage entrepreneurship and innovations, especially in the digital space, including the following:

- Develop an incubation setup to encourage startups and entrepreneurs to design products and services for the MFT market.
- Establish a "Tourism Technology Fund" to encourage technology innovation and adaptation in the tourism sector.
- Establishing platforms for prototyping and test-bedding of new technologies, development of technology products or services with a clear MFT focus.

MARKETING RECOMMENDATIONS

9. Marketing Challenges

The marketing of MFT is not an easy task because the demands of non-Muslim tourists and Muslim tourists are not identical. The non-Muslim tourist may decide not to travel to a particular destination in the absence of certain attributes (Battour et al., 2011; Battour et al., 2014). Therefore, the challenge for Muslim destinations is how to cater for the non-Muslim tourist and satisfy their needs without clashing with Islamic teaching. Therefore, MFT practices could be seen as constraints to tourism destination development.

The combination of a good understanding of global MF market trends, choosing the right market segment to supply products and services in which the country has competitive advantages, together with the use of essential marketing strategies such as effective product branding, can result in the growth of the MFT industry which should be a win-win situation for both the local small and medium size entrepreneurs and for consumers of MF products.

To reach these purposes, scientific methods of joint tourism marketing and advertisement are very useful. As a proposition, OIC could develop an Internet Guide for MFT to provide all actors in the tourism sector with comprehensive and updated information on tourism investment opportunities in the OIC countries.

10. Setting an overall MFT market goal to encourage growth in the MFT sector in OIC member states

64 million Muslims visited OIC destinations in 2014, which was around 33.8% of the total arrivals to OIC destinations. It is projected to reach 98 million by 2020. In order to encourage the member states to make MFT one of the main segments of tourist arrivals to the country, a new target at the OIC level can be defined (e.g. goal of attracting 100 million Muslim visitor arrivals to OIC destinations in 2020). This will require closer cooperation among the OIC member states in implementing these recommendations.

11. Capturing opportunities in the niche sub-segment within MFT

Some OIC destinations and non-OIC destinations could look at getting a certain percentage of hospitality services catering to this need of travelers looking for Halal activities and recreational activities. These include facilities providing swimming pools, spas, hammams and Gyms with privacy as well as Hotels that do not serve alcohol. Thailand, a non-Muslim majority country, has taken the exceptional step of introducing the concept of Muslim-friendly spas that conform to 'Halal regulations' in a bid to lure tourists from the Middle East. Some beach resorts in Turkey have targeted this segment with family beach areas.

12. Implementing and streamlining the basic MFT related services

Halal food, prayer facilities and water friendly toilets are three basic faith based needs of Muslim travelers. As for Halal Food, except in a few countries, there is no clear identification of Halal food outlets in OIC member states. Although it is assumed that, in OIC countries, most food is Halal. For example, the availability of an in-room cooking facility would allow Muslim tourist to prepare their own meals.

When there is a lack of Halal food available at a destination, many Muslims choose to prepare their own meals. In non-OIC destinations, the availability of vegetarian meals is a possible option for Muslim tourists to choose from when Halal is lacking at a dining facility.

Furthermore, MF hotels should be available in the destination or at least separated sections in hotels where no alcohol beverages and no pork are provided. Prayer facilities are generally available. However, cleanliness and upkeep needs consistency. The area of concern is also the location of wudu (ablutions) facilities further away from the prayer room in some destinations. Water friendly toilets are generally available. However, upkeep is not always consistent. Availability of Muslim swimming suit for women in destination may satisfy Muslim tourists. It is sometimes called burqini or burkini swimsuit. Instead of banning burquini, and in order to become more MF, some countries should create women only beaches or pools. Burqinis are expected to gain importance in beach leisure as more Muslim and non-Muslim women recognize its multiple benefits, including sun protection, flexibility and modesty. In the case of Muslim women, particularly, the burqini has enabled Muslim women to be more involved in beach-related family activities. However, some resorts in Morocco ban it in their pools and this could be negative for some destinations to become more MF, as several resorts in destinations such as Turkey, Egypt and the UAE are actually trying to become more MF by creating women-only pools and welcoming the Muslim full bathing suit (Al Arabiya News, 2014)

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).

13. Targeting Muslim Minority Countries

In Muslim minority countries such as Taiwan, Vietnam, China, and South Korea, MFT tourism is considered a good business opportunity. Travel agencies could target Muslim travelers by customizing Halal tours to Muslim tourists; availability of Halal food, an itinerary built around prayer timings, visits to mosques. Programs could be designed to visit Islam related historical religious and cultural sites whereby Muslims can learn about other communities and share their faith. In general, travel agencies have many Halal tourism opportunities in areas such as Halal business travel, family-friendly packages, MF services, luxury market segment and heritage souvenirs.

14. Developing healthcare services and facilities for the Muslim market

Traveling for healthcare is a fast growing market. Except for Malaysia, which is positioning itself for this segment, other OIC countries have not actively promoted themselves as medical tourism destinations for Muslims. They could look at identifying strengths of healthcare services among the OIC member states, and develop them in specialized hubs of healthcare services. This could then lead to a plan to encourage intra-OIC healthcare services.

Some treatments on offer might be contrary to Islamic teachings and should be modified (Yaman et al., 2012). The provision of black hair dye and wig treatments, and 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 and thus would need to be altered and adapted to better serve a Muslim client (Yaman et al., 2012). Beauty products need also to 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).

The décor of the heath 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 include the provision of Halal meals and allocated time for prayer (Chanin et al., 2015).

TECHNICAL RECOMMENDATIONS

15. Standardization of Certification System. Increasing awareness of the MFT market among the travel industry stakeholders

As MFT is a relatively new concept within the travel sector, understanding its market and key components is critical for the development of this segment in the OIC member states. Currently, except for a few countries, awareness workshops and training of hospitality staff on the MFT market has been very weak in the OIC destinations. This has also led to inconsistent use of terminology and definitions to refer to the different aspects of MFT. In order to increase awareness, the following actions are recommended:

- Standardize and publish a guide on the terminology used in the MFT segment in all the major languages of OIC member states;
- At the destinations, roll out market awareness and customer service training programs for the travel and hospitality professionals on all aspects of MFT;
- Develop an accreditation program on MFT for travel industry staff;
- Engage with local universities and educational institutions to develop MFT related programs.

Awareness of MFT market should extend as much as possible to the local communities, through social media and other traditional media such as radio, print and television. There are real challenges in developing and marketing MFT. Many terms used such as 'Halal travel' 'Halal tourism,' 'Muslim Friendly', and 'Islamic travel'. Therefore, a standardization system is needed to certify Muslim friendliness in hotels, resorts, cruises, restaurants, airports and parks.

16. Developing Handbooks and Guides

Handy Halal food guides/directories could be propagated through compact disc (CDs) as well as through official and popular websites with timely online updates of new outlets, new dishes, and guest reviews.

17. MF Airlines and Airports

One of the areas that needs more innovations and is neglected to make the destination Muslim friendly is 'Muslim-friendly airlines'. Destinations, hotels and resorts, airlines, and travel agents are recommended to position themselves in MFT market.

As for Airlines, there is a concern among some Muslims that "Muslim Meals" (MOML) do not adequately define what a Halal meal is. Further, only Saudia Airlines provides a prayer space onboard the plane. In order to streamline these basic services, some of these actions can be undertaken in close cooperation and coordination with SMIIC.

- Establish Halal certification system/body in OIC member states, where there is none currently;
- Publish guidelines for the provisioning of prayer facilities, Halal food outlets and water friendly toilets at Airports, Highway stops, hotels/resorts, attractions and other travel services ;
- OIC (possibly through SMIIC or COMCEC) may take up the issue of "MOML" with IATA.

Finally, Muslim friendly airport is a starting point that could be used in promotion tools to market the destination as MF.

18. Staff Policy

It seems that performance is significantly influenced by two variables of Halal certification practices namely facilities and staff policy. The other variables of Halal practices such as documentation, management responsibility, raw material, location, exterior area, premise, tool and equipment, staff characteristics, pest control and waste management do not have significant relationships with hotel performance. Hospitality industry must consider the importance of facilities and policy to persuade employees to perform services to customers and co-workers to keep a high-level performance. The relationships of facilities and staff policy to service quality, employees' job satisfaction and pro social service behaviors appear to be obvious.

19. The Role of the Internet in Marketing MFT

In general, technology will play a major role in the sale of tourism products and MFT products in particular. Hotels should announce their promotional activities on the internet via web sites and social media. It also provides a competitive advantage, especially for hotels targeting the niche market such as Muslim, Jewish or any other religious community. It is important for marketers to understand these changes because the importance of the internet is growing every day.

20. Developing MF Applications

Muslim customers are one of the fastest developing market segments and its needs cannot be ignored by destination marketers and tourism operators (Battour & Ismail, 2014; Battour et al., 2014).

Therefore, innovation is one of the success factors in this huge market. In developing new ideas and innovations, technology plays an important role in MFT. In this regard, one of the best practices to make destination MF is MF applications. Computer and Smartphone applications should be enhanced and expanded by the inclusion of the types and brief descriptions of recommended cuisine from each outlet, a price range, reviews from the foreign guests, indication of proximity to mosques, as well as essential information on annual events, major shopping areas, cultural sites, key advices, etc.

For example, Thailand, a non-Muslim country has taken the initiative to launch MF applications to help further enhancement tourism industry in Thailand (Lefevre, 2015). It helps visitors to find hotels and shopping centers with prayer rooms and restaurants that provide Halal food availability. It is expected that non-Muslim countries that target Muslim travelers will develop their own applications.

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