Halal
Tourism
The burgeoning growth of the global Muslim travel population signals an immense potential for Muslim travel related products and services. According to the Mastercard-CrescentRating Global Muslim Travel Index 2017 (GMTI 2017), there were an estimated 121 million Muslim international travellers in 2016, and this is projected to grow to 156 million by 2020. This market segment has been acknowledged as the ‘third one billion’ opportunity following the interest in Indian and Chinese billions (Janmohamed, 2016) and predicted to reach 30% of the world’s travel population by 2050 (Pew Research Centre, 2017).

Asia and the Pacific is the home to the largest population of Muslims. Of the world’s 1.6 billion Muslims, an estimated 62% are in Asia, specifically in Indonesia, (which has the largest number of Islamic adherents in the world with an approximate 203 million), India, Pakistan, Bangladesh, Iran, China, Malaysia, Brunei Darussalam, Afghanistan and the Maldives (Pew Research, 2017 ). In addition, smaller minorities are present in Thailand, Sri Lanka, Philippines, Cambodia, Singapore and Viet Nam. The growing middle-class of Islamic countries in Asia and the Pacific with disposable income to travel has led to a lucrative outbound market of Muslim travellers that has been targeted by many “non-Muslim” countries in the region.

FAITH BASED NEEDS OF MUSLIM TRAVELLERS
A total of 9 key faith-based needs that would influence the consumption behaviour of Muslim travellers which includes (1) Halal Food, (2) Prayer Facilities, (3) Water-friendly Washrooms, (4) No Islamophobia, (5) Social Causes, (6) Ramadhan Services, (7) Local Muslim Experiences, (8) Recreational Spaces with Privacy and (9) No Non-Halal Activities (Mastercard-CrescentRating, 2019). These factors are grouped under 3 different sections (1) need to have, (2) good to have and (3) nice to have.
**Need to have**

Halal food is the most important factor that a Muslim traveller needs when travelling. Restaurants that can be easily identified as Halal is the mostly wanted by Muslims. Next, the availability of prayer facilities with prayer rooms, qibla directions and ablution friendly washrooms are needed by Muslim travellers. Thirdly, water-friendly washrooms as water plays an important role in purity and cleanliness for Muslims. These facilities have become easier now that there is a widespread availability of hand showers, bidets and Japanese-style toilets.

With increasing hate crimes seen around the world, safety has become a primary concern for Muslims travellers. In addition, Islamophobic sentiments has been lingering in some regions and Muslim travellers are not encouraged to travel to destinations that are perceived to be unwelcoming. Also, with 36 increasing hate crimes around the world, safety and security has become a primary concern for Muslim travellers (Mastercard-CrescentRating, 2019).

**Good to have**

Good to have services includes Social Causes, Ramadhan Services and local Muslim Experience. Driven by faith and global trend towards sustainability, Muslims are becoming more conscious of being socially responsible during their travels. Social causes include the ability to improve local living conditions, various green initiatives to perfect the environment and eco-friendly tourism practices. Ramadhan services include the provision of Suhour and Iftaar meals, prayer facilities, services during the Eid among others. Even though Muslims are most unlikely to be traveling, there are a few Muslims that wishes to be away from home during the period. Destinations that wishes to attract Muslim travellers during this period need to be able to accommodate their special needs during this month.
Local Muslim experiences which refers to experiences unique to the destination that allows Muslim travellers to connect with their Muslim identity and heritage. This could include visiting Islamic heritage sites, interacting with local Muslim communities at a local mosque or experiencing the country with a Muslim tour guide (Mastercard-CrescentRating, 2019).

Nice to have

The nice to have services include: Recreational Spaces with Privacy and no Non-Halal Activities. Recreational Spaces with Privacy refers to facilities such as swimming pools and gyms, beaches, spas and beauty salons that provides privacy for males and females. This is especially important for females as they need to have appropriate modesty. No Non-Halal Activities are regarded as nice to have as some Muslims would prefer to avoid facilities and activities that serve alcohol or staying in gambling resort.

KEY MARKET SEGMENTS

Within the broader Muslim travel market in the region, two key markets have been given prominence due to their growth potential, namely the Muslim women travellers and the Muslim millennial travellers (MMT).

Muslim female travellers usually travel with their friends and family to seek for new and authentic experiences. The Muslim identity and religious beliefs largely influence the Muslim women's tourism experiences, lifestyles and travel patterns and/or behaviors. With sharing their experiences, they hope that it would be an inspiration to others. They have a stronger influence in planning their trips whether they are travelling alone, with their family or friends (Mastercard-CrescentRating, 2018). Muslim female travellers find it important to have gender-segregated facilities such as swimming pools, gyms, spas or saunas for privacy.
as it would affect them since they are required to have appropriate modesty (Razzaq, Hall & Prayag, 2016). They would usually travel for leisure or to distress.

**The Muslim millennials** The Muslim millennials are tech-savvy, self-empowered and enthusiastic consumers whose identities proudly encompass both faith and modernity. Muslim millennial travelers are distinct from their previous generations and other millennial travelers, with a unique set of values, needs and expectations in their travel consumption and expenditure patterns. They often spend more time and effort to conduct comprehensive research before making travel arrangements.

The Muslim millennial travellers mostly travel for leisure and holidays, experiencing local culture and heritage, and visiting friends and relatives (Mastercard-CrescentRating, 2017). On average, they travel 2 to 5 times a year, and are generally cost conscious. When planning for trips, the top 3 factors that would influence them were cost of flights and accommodation, safety and tourism concerns and availability of Halal food (Mastercard-CrescentRating, 2017).

For Muslim millennial travellers, they prioritise affordability, location and free Wi-Fi when selecting an accommodation. Specifically, for Muslim-friendly services and facilities, they value availability and proximity of Halal food options, mosques and prayer facilities and water-friendly facilities. When booking for flights, ticket pricing, safety records, baggage allowances and Halal meal choices were important considerations. They also preferred Halal assured and certified places but would not mind dining in a seafood-only or vegetarian-only restaurant. Finally, they love to share their photos during their travels on social media pages such as Instagram, Facebook and Snapchat (Mastercard-CrescentRating, 2017).

**RANKING OF SOUTH AFRICA AS A MUSLIM FRIENDLY DESTINATION**

The global Muslim population is diverse and geographically distributed into segments in Muslim majority destinations as sizeable minorities in other
destinations. According to the Regional Analysis of GMTI 2017 Scores, Africa is the third best region that is friendly for Muslim travellers (Mastercard-CrescentRating, 2017) reflecting the regions concerted efforts in adapting and improving their services to attract the Muslim travel market.

South Africa is one of the destinations that is ranked well in the Global Muslim Tourism Index 2019. South Africa is ranked 29 under the GMTI global ranking and 6 under the top 10 Non-OIC destinations. It is evident that South Africa is becoming more friendly for Muslim tourists. South Africa is also ranked under the top 10 destinations in terms of ease of communications where there are outreach initiatives that includes public education, media outreach and Muslim visitor guidebooks.

Cape Town has a rich Muslim history and heritage, with the Cape Malay Muslim’s making up around a quarter of the city’s population. It was ranked as the 4th best travel destination for Muslim travellers in the 2017 Global Muslim Travel Index.

**Key Drivers in the Muslim Travel Market in South Africa**

**Mosques, kramats, and prayer rooms**

The Cape Town city offers prayer rooms in major centres and a large number of mosques found across the province. It is also the home to the oldest mosque in South Africa, dating back an impressive 200 years. There are also a number of Kramats, known collectively as the Circle of Saints or the Ring of Kramats.

**Muslim Community**

Cape Town is the place for South Africa’s first Muslim settlers and the Cape Malay Muslim’s make up around a quarter of the city’s population.
**Culture and Heritage**

The Bo-Kaap area in Cape Town, which was formally known as the Malay quarter, is still home for many Muslims. In the area that is popular for its rainbow-like houses, there are more than seven mosques. The Bo-Kaap museum highlights the early contribution of Muslim settlers to Cape Town and a major attraction to Muslim travellers.

**Halal food options**

Cape Town, renowned for its’ gastronomy, is the food capital of the Western Cape. Recently, halal restaurants serving these traditional dishes have been increasing, making it possible for Muslim travellers to enjoy local food and observe their faith-based needs.

**Muslim friendly hotels**

Major chains, such as Hilton, One and Only, have introduced Muslim-friendly rooms. These rooms include a prayer mat and the Qur’an. The rooms are also free of alcoholic drinks. All the food that is prepared in the kitchen is made without alcohol and pork. The Hilton Cape Town City Centre kitchen is completely ‘halal’.

**KEY DRIVERS IN THE MUSLIM TRAVEL MARKET IN SOUTH AFRICA**

With the increasing growth in the Muslim Travel Market, more businesses and destinations are now entering the industry to better cater to the needs of the Muslim travellers by adapting their products and services. The increase in Muslim-friendly destinations creates a virtuous cycle, creating more opportunities for Muslim to travel.
**IMPLICATIONS FOR SOUTH AFRICA**

**Market Outreach**

As South Africa is ranked under the top 10 destinations in terms of communication, South Africa has outreach initiatives which includes public education, media outreach and Muslim visitor guidebooks. However, to attract more international clientele, Western Cape could leverage on these initiatives as well as use the right channels and the right language medium (e.g. English, Arabic and Malay) to reach the target market in the Asia Pacific region. A concerted effort needs to be made to build online content to attract and improve its overall global Halal destination branding (Mastercard-CrescentRating, 2018)

**Muslim Visitors Guides (MVG)**

More travel information, recommendations and tips for Muslim visitors should be curated and organised into province-specific Muslim Visitors Guides (MVG). Besides publishing it in English, the MVG should also be made available in Malay and Arabic, as these are among the common languages spoken among the Muslim population (Mastercard-CrescentRating, 2018)

**Halal Tourism Stakeholder Workshops**

Western Cape could organise more Halal Tourism workshops to educate tourism stakeholders with varying degrees. Workshops and discussions should be carried out for better improvement of the Western Cape’s halal positioning (Mastercard-CrescentRating, 2018)
Language courses for tour guides and hospitality workers

English, Malay and Arabic are some of the most widely spoken languages among the Muslim population in the region. English, Malay and Arabic language courses and training should be conducted for tour guides and employees in the hospitality and tourism sector to better serve the Muslim travelers.

Improve Wi-Fi Network Coverage

Travellers perceive staying connected as being of high importance when travelling as it allows them to navigate their travels, search for information and book tourist services such as lodging, transportation and activities and even sharing of their travel experiences on their social media platforms to their personal network. Therefore, improving Wi-Fi network coverage and introducing Wi-Fi hotspot is important and this is not just limited to airports but other public areas such as convenient stores, restaurants, hotels and malls (Mastercard-CrescentRating, 2018).

Enabling Climate

With the huge potential of Halal Tourism, the Western Cape province should develop an enabling climate for start-ups and innovation for Halal-related services to flourish. Many services in the hospitality sector today have been disrupted by the proliferation of digital technologies. By enabling a vibrant environment for start-ups, Halal Tourism services and products will be able to integrate latest technologies and business models (Mastercard-CrescentRating, 2018).
Championing Sustainability and Community Initiatives

With its ready beautiful locations that highlight the wonders of nature, Western Cape could package services around travel themes that promote sustainability and the care of the environment. This can further attract the Muslim millennials who are attracted to serving Islam’s message of preserving the environment while enjoying their travel experiences and travellers in general who value sustainable tourism.

Position Halal Benefits for All Guests

Although Halal Tourism mainly target Muslim travellers, the concept can also have a universal appeal for non-Muslims due to numerous benefits such as peace and security, family-friendly environments and water-friendly services. The non-alcoholic nature of some Halal hotels and restaurants can also attract families who are looking for an overall environment which they perceive to be family-friendly (Mastercard-CrescentRating, 2018).

Halal Certification and Rating

Halal certification and rating is necessary as it provides assurance, diminishes possible scepticism and instils trust and confidence in Muslim consumers (Mastercard-CrescentRating, 2018). As such, such Halal assurance will also be valued by Muslim travellers as they look for their idea hotels and restaurants. Following this trend for standardisation, global Halal assurance and rating schemes such as Crescentrating will also assist the country in obtaining better acceptance from guests around the world.
Increase in Global Service and Governance Standard

The drive to develop the tourism space represents an opportunity for South Africa to further strengthen its level of hospitality services and governance standards (Mastercard-CrescentRating, 2018). Beyond infrastructure and skills development, adequate and integrated Halal assurance across its service value chains which communicate both permissibility and high quality is key to attracting both Muslim and non-Muslim travellers to its destinations. Hotel staff should be trained and educated about Muslim travellers’ values and teachings to be able to cater to halal conscious tourists in accordance to Islamic principles (Mastercard-CrescentRating, 2018). Gender-separated facilities such as gymnasiums, spas and family entertainment will further enhance its offering for this market segment.

Differentiated Destination Strategies

Western Cape can capitalise on its diverse regions to cater to a variety of Muslim travellers who may have different travelling profiles (Mastercard-CrescentRating, 2018). Muslim millennials who may be looking for more authentic experiences can savour its many off beaten tracks while still connected via WIFI to share their experiences, whereas family travellers may be greeted with more warmth and developed service-oriented facilities at resorts. These differentiated activations of destination-spaces can attract a wider variety of Muslim travellers from around the world and further improve the country-branding of Western Cape as a safe and vibrant destination for all (Mastercard-CrescentRating, 2018).

Innovative Tourism Products and Experiences

Western Cape can converge with other Islamic economy sectors and bundle them into innovative tourism products (Mastercard-CrescentRating, 2018). For
example, the province can include Islamic heritage sites and religious travel experiences with activities pertaining to culture and heritage in a unique and innovative travel package (Mastercard-CrescentRating, 2018).

**Enhanced Prayer Spaces and Facilities**

For Muslim women, the need for proper ablution facilities is high (Mastercard-CrescentRating, 2018). Most of the ablution areas at mosques or prayer spaces are in a public area and there is little privacy for Muslim women who are covered. By providing proper ablution areas and water-friendly facilities and thus making it convenient for Muslim travellers, it can add value to their travel experience.