

CHAPTER 17

Conclusion: Emerging Trends and Future Prospects in the Muslim Travel Market

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Introduction

This volume has provided an overview of a number of different dimensions and trends in the contemporary Muslim travel market. As such it highlights the range of different Muslim experiences of travel that exist depending on country of origin and destination, culture, interpretive tradition and position, gender and sexuality, among many other factors. This situation stresses that while there are clearly commonalities in travel and tourism consumption practices there are also many differences and reinforces to readers, as Yosry (2021) noted in other contexts, this observation regarding Muslim travel practices provides yet further ‘evidence to the rest of the world that Islam should not be defined by the narrow perceptions of the ideologues’, wherever they are from.

The religious commonalities that identify followers of Islam should therefore not be seen as providing for undifferentiated tourist behaviours and motivations, even though this is arguably portrayed as such in much of the literature, especially that written by Muslims or those based in Muslim majority countries (Hall & Prayag, 2020a). Instead we are faced with a reality of a rich tapestry of travel practices that deserve a much more informed discussion than that seemingly heavily influenced by often very conservative interpretations from political and religious institutions and leaders (Razzaq et al., 2016; Hall & Prayag, 2020a). These issues will be discussed in the context of the current debates associated with Muslim leisure behavior while travelling.

Muslim-friendly Tourism

Several studies have suggested that the Muslim-friendly tourism (MFT) market has increasingly become one of the most rapidly growing sectors worldwide and a significant niche market (e.g., El-Gohary, 2016; Mohsin et al., 2016; Arasli et al., 2021; Papastathopoulos, 2022). According to the Mastercard-CrescentRating study (2018), there were 131 million Muslim arrivals worldwide in 2017, which was expected to account for 10% of the global travel market by 2020. Although this increasing number fell to 42 million in 2020 as a result of the COVID-19 pandemic, a more recent projection from the Global Muslim Travel Index (GMTI) 2021 (Mastercard-CrescentRating, 2021: 11) shows that “the Muslim travel market will recover up to 80% of the 2019 levels in 2023”.

For Jafari and Scott (2014), such growth could be explained by greater hedonic consumption (e.g., recreation, entertainment, and seeing new places) as well as religious motives such as the Hajj and Umrah of Muslim tourists. Indeed, it is important to stress that the vast majority of motives of Muslim leisure travellers are arguably no different to those of secular tourists (Razak et al., 2020). However, while growth in this significant market is undoubtedly occurring, both the nature of the market as well as the notion of growth itself, require a more critical analysis than what is often the case, otherwise comments regarding Muslim market growth will start to resemble the oft-stated undergraduate repetition of “tourism being the world’s largest industry”. Repeating something often enough does not make it true. In the case of potential market size growth is representative of population increase but that does not necessarily translate to increasing travel by Muslims. Instead other factors such as accessibility, income levels, consumption practices and regulation may be far more significant. Similarly, the very notion of what constitutes a Muslim traveller requires more

detailed interrogation, with travel by people from some Muslim-majority countries being counted as Muslim travellers on the basis of state definition rather than personal belief systems. While there is insufficient discussion of what might be described as secular or lapsed Muslims or the notion that Islamic religiosity, and therefore the religious dimensions of travel, may be better understood on a continuum than as a black/white or yes/no concept (Marranci, 2010; Martin, 2010; Anand, 2014; Bayraklı & Hafez, 2019; Vliek, 2020).

With the emergence of the Muslim travel market, various terminology and concepts have been used to refer to either the whole Muslim travel market or its sub-segments, often interchangeably and with little conceptual clarity (Razak et al., 2020). In popular and academic literature, terms like MFT, halal travel, Islamic tourism, sharia tourism, and halal tourism have been regularly used. However, depending on who is using the terms and in what context, the focus of these terminologies has shifted. MFT tends to refer to the tourism segment which caters to the faith-based needs of Muslim travellers (Razzaq et al., 2016; Hall & Prayag, 2020b). Mohsin et al. (2016) defined MFT as tourism products and services that meet Muslim tourists' needs, such as devotional facilities and dietary restrictions, while adhering to Islamic law. Although the terms halal-friendly and Muslim-friendly are interchangeable, Muslim-friendly service/facility has been widely suggested by the media and international organizations. For instance, in its report on understanding the demand and supply sides of MFT in Organisation of Islamic Cooperation (OIC) member countries, the Standing Committee for Economic and Commercial Cooperation of the Organization of Islamic Cooperation (COMCEC) (2016) presented a conceptual framework of MFT in terms of three components; core faith-based travel needs; consumer demands with respect to Muslim travel motivations; and supply side key themes (travel and hospitality services and facilities). According to COMCEC (2016, p. 19) this framework "allows destinations and services to plan a coherent product adaptation/development strategy aimed at the MFT market". Battour and Ismail (2016) also suggested four specific attributes for MFT; Islamic facilities, Islamic morality in general, halalness, and gambling and alcohol ban. However, such suggestions highlight the way in MFT should best be understood as a continuum rather than absolute categories (Razzaq et al., 2016) as well as issues over whether notions, such as Islamic morality or halalness, are externally prescribed or determined by the travellers themselves in line with their own conscience and relationship to God. This is an important issue given that particular interpretations by governmental and religious authorities will have implications for the management of product offerings as well as the external moral framing as to the appropriateness of traveller behaviour and destination selection.

Issues of definition can also affect marketing strategies. Khan and Callanan (2017) examined issues of definition in their study of the "Halalification" of tourism in the UK. In their content analysis they found no clear difference between the use of terms (e.g. halal, Muslim friendly, Islamic, Sharia) in popular UK media, UK-based tour operators' websites, and strategies of destinations popular with Muslim tourists. They also argued that the lack of a clear and consistent use of terminology along with the lack of halal certification standardisation may have implications for consumer trust (Khan & Callanan, 2017), clearly providing an important topic for future research.

While the OIC member states arguably have a competitive advantage for attracting the major share of the MFT market, the recent growth of this market as well as emerging non-OIC destinations (e.g., New Zealand, Taiwan, Korea, Japan) have challenged the leadership of OIC destinations in the MFT segment as well as potentially requiring a reassessment of Muslim traveller motivations and tourism consumption practices. Recognizing Muslim consumers' needs is therefore crucial for articulating inclusive service quality and providing a memorable experience in order to gain a competitive advantage. This is particularly significant as, in light of the COVID-19 pandemic, many countries and destinations are focusing on the MFT market as part of economic recovery

strategies. For example, Mastercard-CrescentRating (2021), argued that Asia's travel and hospitality sector should focus more on the halal tourism segment to help the industry recover, since this section of the market was experiencing a boom prior to the pandemic in countries such as Japan and Thailand. For instance, the study of Han et al. (2019) on halal-friendly destination attributes in South Korea found that almost 60% of international Muslim tourists visiting South Korea indicated that the availability of halal services and products was important in selecting this travel destination. Thus, this highlights the need for hospitality industry stakeholders in non-Muslim countries to address the specific demands of Muslim tourists and to provide services that are consistent with their cultural and religious values. Further research is therefore required to understand what differences exist in comparing between the profile of Muslim travellers between countries.

Millennials and the Muslim travel market

Given the relative young age of adherents of Islam compared to other religions, it is unsurprising that millennials have been identified as a significant segment and a key driver of Muslim travel market growth (Salam et al., 2019). The *Muslim millennial travel report 2017* of Mastercard-HalalTrip (2017) indicates that travel among this new generation of Muslims is rising as with more disposable income, they seek more exotic experiences and far-flung destinations. This is particularly important as the global Muslim population is expected to grow further, with Muslims being the youngest of the major religious groups in the world, with an average age of 23 years – seven years younger than non-Muslims (Lipka, 2016) and with far more purchasing power. Muslims under the age of 30 account for a significant share of millennials in Muslim majority countries, and Muslims are expected to account for 29 percent of the global young population aged 15-29 (Annuar, 2018). The Mastercard-HalalTrip (2017) report emphasizes the increasing importance of the next generation of Muslim travellers to the global tourism industry, as evidenced by shifting global socio-economic trends and potential pent-up demand. According to this study, total expenditure from Muslim millennial travellers (MMT) will exceed US\$100 billion by 2025. The study of Abu Bakar et al. (2018a) on characteristics of MMT residing internationally also illustrated the distinct travel needs of this segment of the Muslim travel market. According to their study, MMT seek authentic, affordable, and accessible travel experiences with such travel patterns being observed in pre-trip preparations, during the trip and while sharing digital experiences (Abu Bakar et al., 2018a). Significantly, similar observation were noted by Oktadiana et al. (2020) and Cuesta-Valiño et al. (2020).

Several studies have also highlighted that the global halal tourism sector is driven by millennials (Annuar, 2018; Salam et al., 2019). Salam et al. (2019) argue that MMT place more value on halal certification and conclude that, for MMT, halal and shariah-compliance are the most essential factors in deciding where to eat. Janmohamed (2016) argues that the MMTs are tech-savvy, self-empowered and enthusiastic consumers who openly embrace both faith and modernity in their identities. This potentially demonstrates how social media may be used in a variety of ways to cater halal products and services to MMTs. Abu Bakar et al. (2018b, p. 8) also noted that "MMTs make themselves highly accessible and visible online when they travel and the internet serves as a digital bridge for them to easily retrieve information and share their experiences of halal destinations, photos and commentaries on food options online and through sharing applications". As such, Muslim millennials clearly share many attributes with those of non-religious millennials although further comparative study would be welcome..

Muslim female travellers

Muslim female travellers represent one of the fastest-growing segments within the Muslim travel market (Fajriyati et al., 2020; Oktadiana et al., 2020; Hosseini et al., 2021) and account for one of

the top ten halal travel trends (Mastercard-CrescentRating, 2018). According to the Mastercard-CrescentRating (2019) *Muslim women in travel report 2019*, 63 million Muslim women traveled in 2018, spending \$80 billion. Muslim women now account for 45 percent of the Muslim tourism market. For Tilley and Houston (2016), such a growth in the Muslim women travel segment is attributed to more flexibility and a wider variety of destination choices as a result of their increased economic and social independence. Although solo female traveling has been under academic scrutiny, as Hosseini et al. (2021) note, there is a limited available research on Muslim solo female travelers. Nevertheless, as chapter two (this volume) indicates, there is substantial variation in gender related mobility between countries, particularly in terms of the capacity of female tourists to travel alone (Seyfi & Hall, 2019; Nikjoo et al., 2021). Clearly, the contexts, constraints and enablers of Muslim female travel require substantially more research, including the relationships that may exist between constraints in a domestic setting with stigmas of solo female traveling and the behaviors that are exhibited when travelling internationally.

Islamic green travel consumption

In light of the existential risks posed by the climate crisis and global environmental change there is widespread interest in the development of more sustainable travel practices, with environmental concerns long regarded as linked to religious beliefs and values (Hope & Young, 1994). Rhama (2021) argues that Islamic teachings support sustainable development. In a similar vein, Sarigöllü (2009, p. 374) notes that the emphasis on fate in Muslim cultures “would imply a more passive rather than a proactive stance” towards the environment. The empirical study of Rice (2006) on pro-environmental behaviors of citizens in Cairo, Egypt reported that Islamic religious teachings and religiosity were associated with pro-environmental behaviour, thus lending support to the presence of an Islamic environmental ethic.

Research on Muslim-friendly travel and environmentally friendly or sustainable tourism is limited. However, there is some suggestion that green consumption is becoming increasingly important as Muslim consumers seek more than simply halal food and accommodations and start looking for eco-friendly hotels, attractions, transport, and destinations. Thus, Battour et al. (2021) suggest that sustainable halal tourism might be implemented by destinations seeking to accommodate the demands of Muslim tourists. Rhama (2021, p. 3) argues that “the potential of Muslim tourists to support sustainability could not only satisfy their religious duty but also tremendously support global needs of poverty reduction, empowerment, natural conservation, climate change mitigation and adaptation and any positive impact sustainability could bring”. The Mastercard-CrescentRating (2019) report also underlines that Muslims, like followers of other Abrahamic religions, have intrinsic religious commitments to protect and steward the environment, which might be exploited by destinations. Such aspects of travel culture, though substantially under-researched may have important implications for tourism consumption and production. For example, Prayag (2020) emphasizes that halal certification processes should incorporate more sustainability concerns and asked about whether Muslim travellers practice sustainability and if halal certification takes into account greater environmental issues. Battour et al. (2021, p. 5) argues that “Muslims are mindful of the positive impact of sustainable tourism as global responsible citizens” and argued that sustainable based new ventures led by halal entrepreneurs will shape the halal tourism services’ market in the future. Nevertheless, such perspectives fail to acknowledge the vital role of government regulation in both halal and environmental practices as well the need for more critical assessment of the gaps between attitudes and behaviours with respect to the sustainability of travel and tourism.

Conclusions

This book has outlined a number of significant themes in contemporary Muslim travel practices, many of which require considerably further study. However, further examination also needs to be given to the nature of research and scholarship in this area as well. As Hall and Prayag (2020a) argued in relation to halal certification and hospitality research, many studies in this field appear marked by a lack of critical analysis or a willingness to discuss negative aspects of halal or Islamic tourism and they surmised that this may be because of not wanting to appear to be critical of either Islam or one's country. In addition, they observe that there is a relative lack of reflexivity in many published works and consideration of how positionality affects both research process and results. Therefore, an important part of future studies in this area is to gain a better contextualisation of the nature of the research process and approach as well as the research subject.

Critical to such research will be further studies on different types of travel in different cultural and national contexts. Ideally, this will include research that highlights the different sharia traditions, the significance of migrant and transnational populations of Muslims, and intergenerational and gender differences in travel behaviours and practices. Such an approach will present a far more realistic and non-idealised assessment of a major travel market segment and of the role of religion, and Islam in particular, on contemporary practices of tourism consumption and production.

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