

2018

ANNUAL REPORT



GLOBAL ECONOMIC IMPACT OF MUSLIM TOURISM AND FUTURE GROWTH

PROJECTION:
2017 – 2020

BY SALAM STANDARD

Produced and developed by :



SALAM
STANDARD

In collaboration with :

tripfez  **PEAR ANDERSON**

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Contents



Executive Summary	2	Projected GDP & Employment from the Muslim Travel Supply Chain, 2017 – 2020	21
Introduction	3		
What is Muslim-friendly travel?	4	Projected Total GDP & Employment of Muslim Tourism Economies, 2017 – 2020	21
Prayer space	5		
Food & beverage	5	How to Take Advantage of the Muslim Sector's Growth	23
Ramadan	5	Introduction	23
Muslim Tourism in 2017: Where We Stand Now	6	The challenge: How can I find somewhere to pray and eat at the airport?	25
Inbound Muslim Tourism Expenditure, 2017	6	The challenge: How can I get halal in-flight meals?	26
Outbound Muslim Tourism Expenditure, 2017	8	The challenge: I need my hotel to have a prayer mat and halal meal options	27
Direct GDP of Inbound Muslim Tourism, 2017	9	The challenge: Where can I find Muslim-friendly hotels to book online?	28
Direct GDP of Inbound Muslim Tourism as a % of Inbound Tourism GDP, 2017	10	The challenge: Where can I find a clean and comfortable prayer room for my afternoon prayers?	29
Direct Employment of Muslim Tourism, 2017	11	The challenge: Where can I find travel information about Muslim-friendly hotels/ restaurants/ attractions?	30
Tax Impact of Muslim Tourism, 2017	11	The challenge: Where can I find 'authentic' halal food?	31
GDP & Employment from the Muslim Travel Supply Chain	12	The challenge: How do I know if the food is really halal? What certification is used?	32
Total GDP & Employment of Muslim Tourism Economies, 2017	12	The challenge: How can I travel during Ramadan?	33
Global Economic Impact of Muslim Tourism from 2017-2020: The Future	14	The challenge: How can I have a more authentic and adventurous holiday?	34
Projected Inbound Muslim Tourism Expenditure, 2017 – 2020	14	Conclusion	35
USA	15	Methodology	37
EU-28	15	Sources of data	37
Middle East	16	Adjustments	37
Asia	16	Acknowledgement	39
Projected Outbound Muslim Tourism Expenditure, 2017 – 2020	17	About Tripfez	39
USA	17	About Salam Standard	39
Middle East	18	About Pear Anderson	39
Europe	18	Global Accolades	41
Asia	18	Media Mention	41
Projected Direct GDP of Inbound Muslim Tourism, 2017 – 2020	19	Exclusive Partners & Parts Clients	42
Projected Direct GDP of Inbound Muslim Tourism as a % of Inbound Tourism GDP 2017 – 2020	19		
Projected Direct Employment of Muslim Tourism, 2017 - 2020	20		
Projected Tax Impact of Muslim Tourism, 2017 – 2020	20		

Executive Summary



- ▶ In 2017, the total GDP impact of Muslim travel was \$148 billion, with a total direct and indirect employment of 4.7 million people.
- ▶ By 2020, this number is projected to rise to \$183 billion and 5.6 million employed worldwide.
- ▶ In this report, we take stock of where the Muslim Tourism segment grew to in 2017, as well as study the trends in a snapshot from 2017 to 2020 across 19 individual economies plus Europe, covering 80% of the world's Muslim travel market.
- ▶ GDP generated by Muslim travel plays a key role in the total tourism GDP per country, ranging from 4% in Vietnam to 78% of total tourism GDP in Saudi Arabia.
- ▶ Asia has started to benefit from Muslim inbound travel expenditure, forecast by 2020 to have 1.2 million jobs directly supported by the Muslim travel segment out of a total of 2.3 million globally.
- ▶ Asia will also play a bigger role in outbound Muslim travel expenditure, with Malaysia, Indonesia and China combined set to contribute 17% of the total global spend, outpacing Europe by 2020.
- ▶ The USA still benefits disproportionately from Muslim travel, with close to 300,000 employed and \$43 billion of Muslim inbound tourism spend forecast by 2020 – despite a dip in 2016 and 2017 due to new travel policies negatively affecting Middle Eastern arrivals.

Introduction

The numbers say it all – by 2060, there will be 3 billion people globally who identify as Muslims, one in three of the world's population¹.

As the Muslim population grows at a rate of 70% compared to the global average of 32%, it only makes sense that the Muslim tourism market will play an ever-increasing part of tourism's overall GDP impact, in parallel to burgeoning industries such as modest fashion, and Sharia-compliant finance, also catering for Muslim consumers' unique requirements.

Countries driving this growth in the Middle East and Asia typically have a younger population, a growing affluent middle-class and a hunger to travel the world in a faith-compatible way.

In this report, we look at the progress of Muslim travel in 2017, and then take a snapshot of Muslim travel over 4 years from 2017 to 2020.

Our definition of Muslim travel covers not just faith-based travel, but all types including leisure, business and visiting family and friends overseas. We project the impact that Muslim travel will have on the tourism industry itself, in addition to the global GDP and employment effect, both directly and indirectly generated.

The report covers 70% of the world's international tourism markets, which also count for 80% of the global Muslim travel segment. The list includes:

Americas: USA

Asia: Brunei, Cambodia, China, India, Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam

Europe: EU-28

Middle East: Egypt, Iran, Qatar, Saudi Arabia, Turkey, United Arab Emirates

Oceania: Australia, New Zealand

The forecast results are exciting with a visible impact on the tourism landscape of both inbound and outbound tourism expenditure. We also see a gradual trend for inbound travel to countries which do not necessarily have a Muslim-majority population and have therefore been regarded as traditionally more difficult to visit whilst staying compliant to the Muslim faith.

National Tourism Organisations (NTOs) worldwide must take account of this fast-growing market segment when formulating their future strategies, and there are plenty of opportunities for established companies – and freshly formed startups – to take advantage of the niches that Muslim travel will open over the coming years.



¹ <http://www.pewresearch.org/fact-tank/2017/04/06/why-muslims-are-the-worlds-fastest-growing-religious-group/>

What is Muslim-friendly travel?



What is *Muslim-friendly travel?*

“Muslim-friendly travel” is a broad term that encompasses the unique needs of Muslims when they travel. Whilst this may vary across different countries’ interpretations of Islam, there are some basic needs which need to be fulfilled in order to make travel compatible with their Islamic faith:

1 Prayer space

Muslims must perform five obligatory prayers a day at ordained times: pre-dawn, afternoon, evening, sunset and night-time, and during travelling prayers must still be performed.

When a Mosque is not nearby, these prayers should be recited in a space which is clean and has ready access to facilities for ablution, which must be performed before the prayer itself. Devotees must then pray in the direction of Mecca. Men and women must perform these prayers in segregation.

Other items which are helpful (although not essential) to worship include prayer mats which have never been stepped on with shoes, a copy of the al-Quran, a wall clock to check prayer times, and a qibla (compass) which shows the direction of Mecca.

2 Food & Beverage

Food and drinks consumed by Muslims must be halal.

Halal means that they should have been prepared in a clean environment with only ingredients which are allowed under Islam, and should expressly not contain pork, alcohol or blood, considered “haram”. Any co-mingling of cooking oil or utensils with those forbidden ingredients would mean that the food is also haram.

In many countries, there is a board for halal certification, where trained religious and food safety experts inspect the premises of the food manufacturer or restaurants, and award them as officially halal. The halal-certified logo is usually displayed prominently at restaurants and on edible goods, to give consumers peace of mind.

3 Ramadan

Ramadan is a holy month for Islam, and one of the Five Pillars of the Islamic faith. Fasting is one of the more well-known activities in which Muslims partake during this period of roughly 30 days, but Muslims also recite prayers and are encouraged to donate to charity during this month.

The fasting takes place daily from dawn to sunset, and Muslims must not consume any food or drinks during this time. Believers rise early in the morning to consumer Suhur, their pre-fasting meal. Once fasting has finished, Iftar, the meal to break the fast, usually starts with dates and water and is quickly followed by more substantial food.

Muslims who travel abroad during Ramadan must still follow these rules, and may experience much longer fasting periods than they are used to in their home countries, especially if Ramadan falls during the summer months and the traveller is in a European country, where daylight lasts up to 15 hours.

Muslim Tourism in 2017: Where We Stand Now

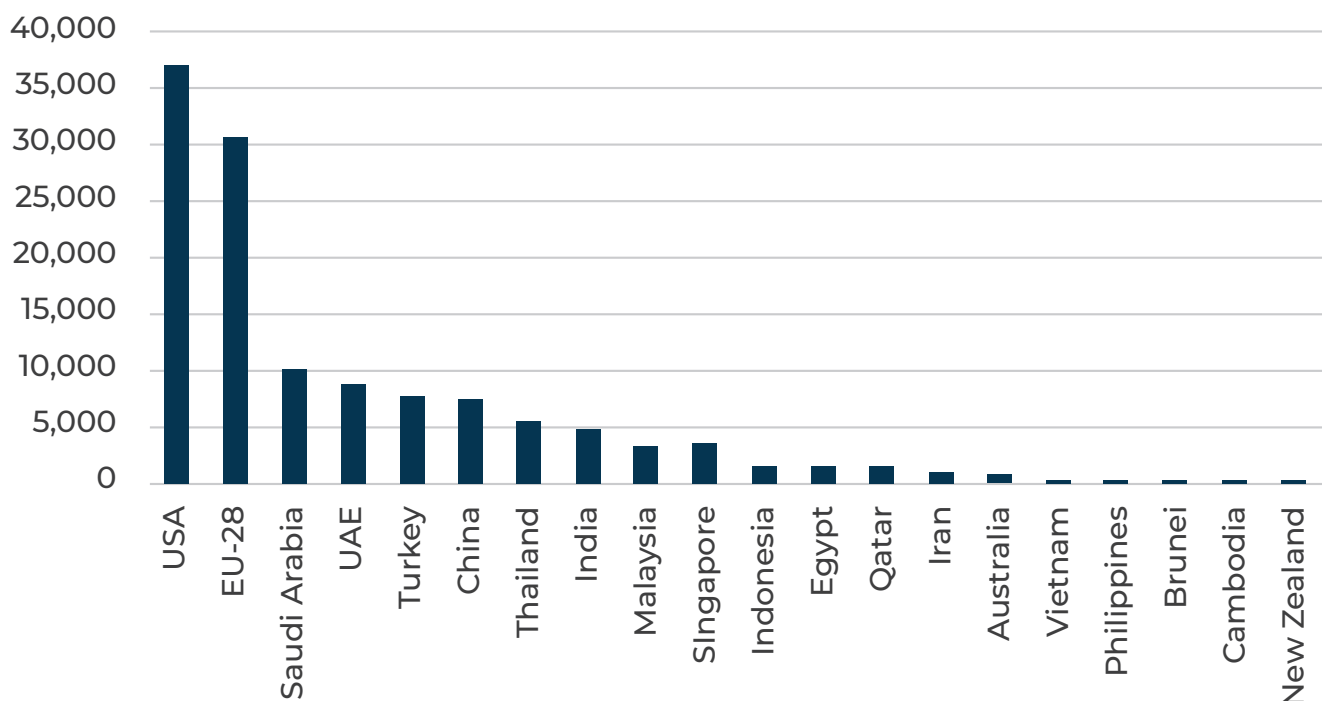


Muslim Tourism

continued to grow apace in 2017, affirming that this is a segment which is not going to fade away any time soon. In this section, we delve into the results from both the inbound and outbound sectors, as well as the overall economic impact that Muslim travel has had.

Inbound Muslim Tourism Expenditure, 2017

INBOUND MUSLIM TOURIST EXPENDITURE, 2017, \$m



In 2016, inbound Muslim travellers spent an estimated \$122 billion – that grew to \$127 billion in 2017, a modest increase of 4% yet still double the growth of 2015 to 2016 (2%).

Whilst the USA received the majority of inbound Muslim tourism expenditure at \$34.7 billion, growth was at 4%, with numbers not yet reaching back to 2015 levels of

\$35 billion. This could be attributed in part to the new visa restrictions implemented under President Trump's administration.

All other regions in 2017 – with the exception of Oceania – saw inbound tourism expenditure increase, with Europe growing to \$30.1 billion, the Middle East to \$30.5 billion and Asia to \$26.9 billion.



Inbound Muslim Tourism Expenditure, 2017

Outbound Muslim tourism expenditure in 2017 surpassed **\$100 billion** for the first time.

When we look at the split of spend between the regions, the Middle East made up the majority of the total spend (61%), at \$62.2 billion. Asia made up close to \$21 billion and 21% of the total share, Europe \$16.5 billion and 16% of the share, whilst the USA, in contrast to its status as the largest recipient of inbound expenditure, made up only 2% of the total outbound Muslim expenditure in 2017, with \$1.6 billion.

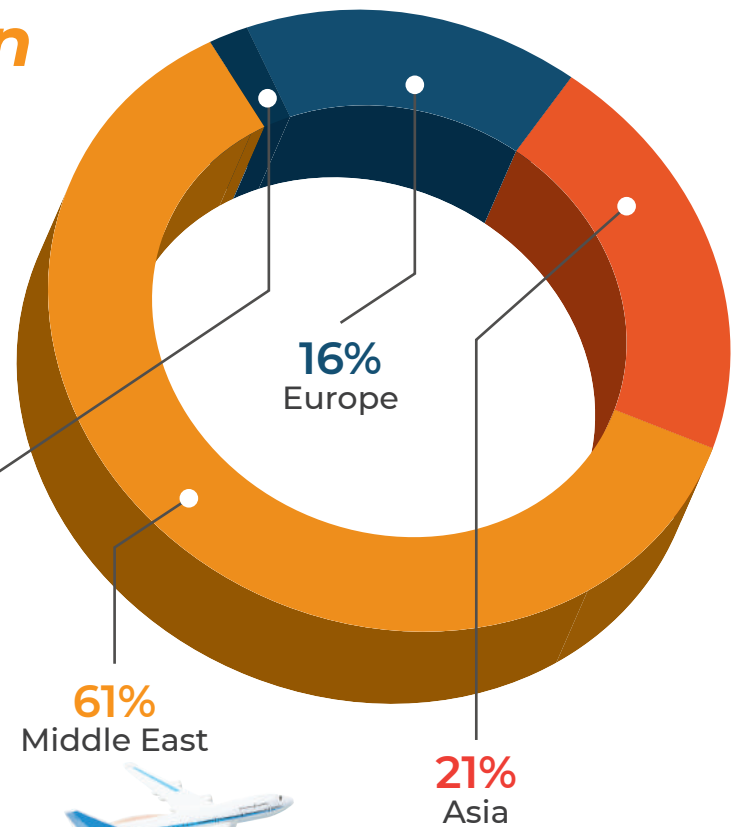


2%
USA

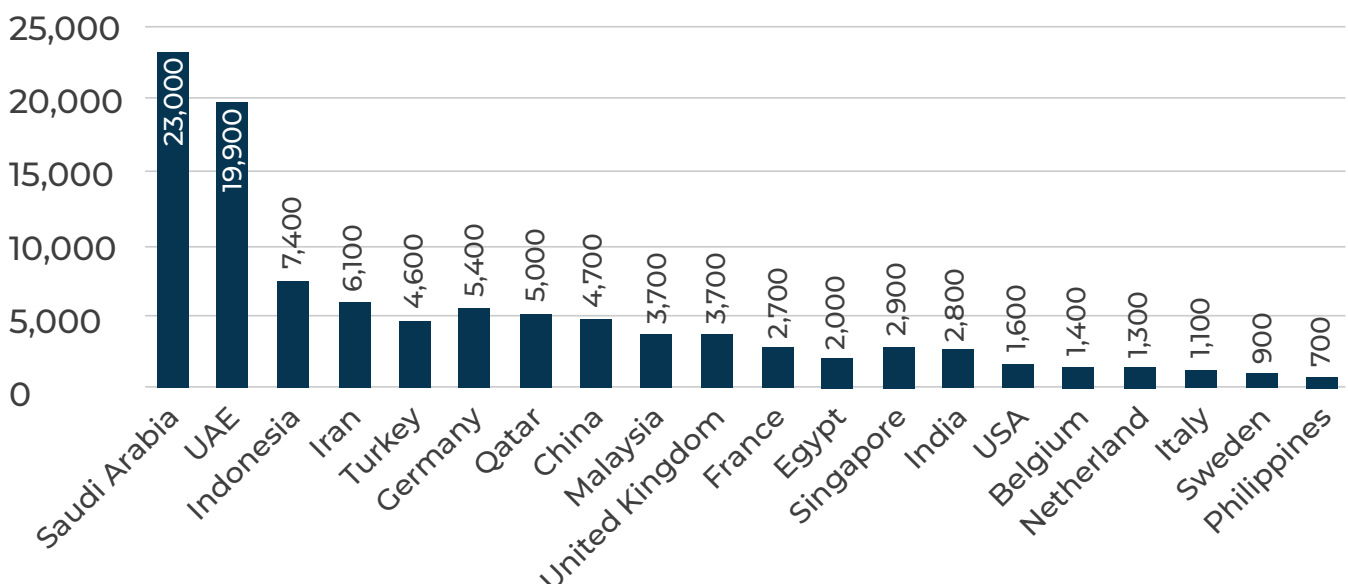
In 2017, not all countries across these regions saw a steady increase in outbound expenditure. Indeed, in the Middle East both Egypt and Turkey decreased in outbound spend, likely linked to their unstable political situation. The United Kingdom also saw a decline in outbound expenditure from \$3.1 billion to \$2.7 billion, linked to a post-Brexit weakened pound sterling, which has dampened the appetite for outbound travel.



Outbound Muslim Tourism Expenditure in 2017, nominal \$m



Outbound Muslim tourism expenditure in 2017, nominal \$m

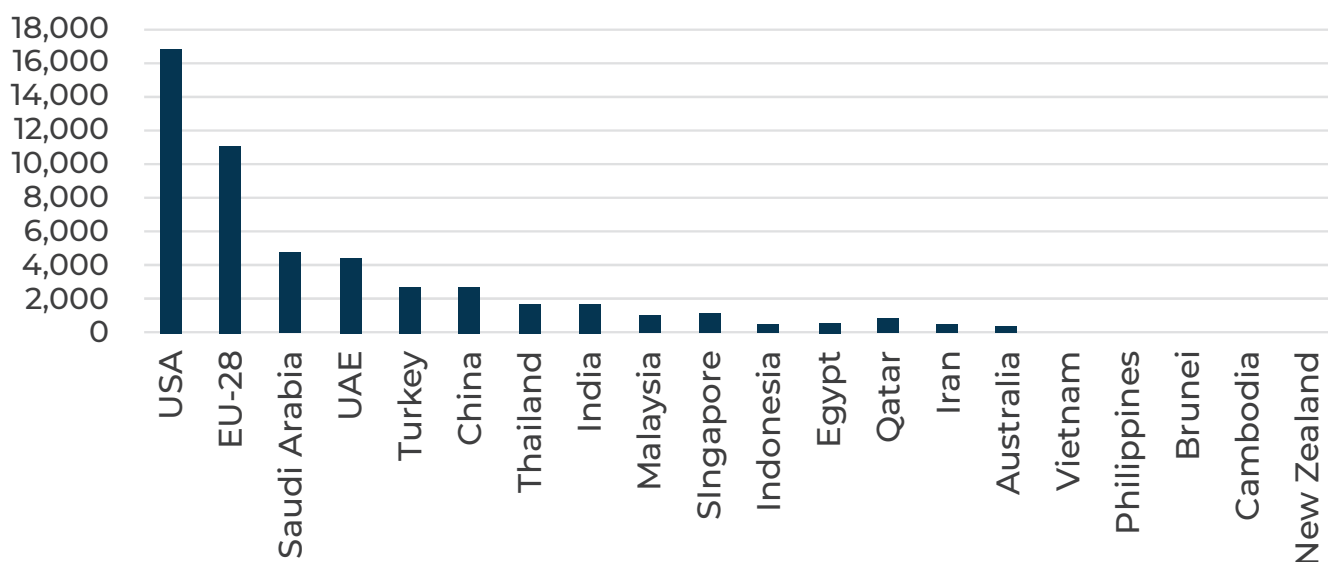


Direct GDP of Inbound Muslim Tourism, 2017

Total direct GDP of inbound Muslim tourism in 2017 was \$53 billion, up from \$51 billion in 2016.

By taking the inbound Muslim travel demand and mapping it to those industries linked to providing tourism services and products – such as restaurants and hotels, cultural attractions, travel agents, airlines, airports, retailers and local transportation services – we can project the GDP created from this segment.

DIRECT GDP OF INBOUND MUSLIM TOURISM, 2015-2020, nominal \$m



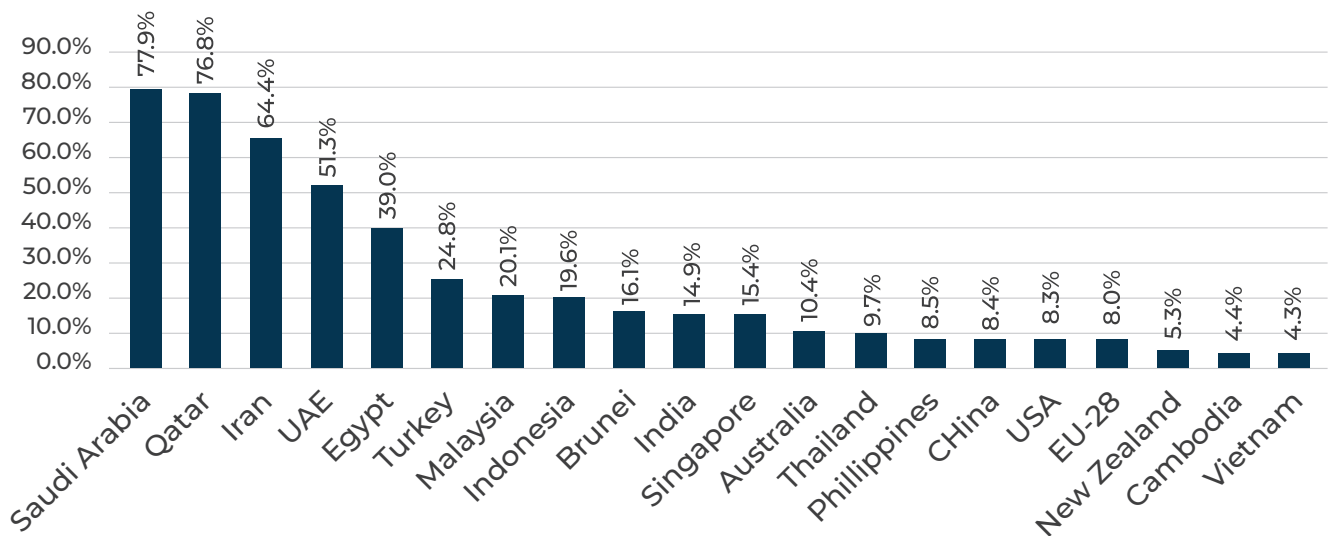
All regions in 2017 saw an increase in the direct GDP of inbound Muslim tourism, with the USA claiming the biggest portion, at \$16.8 billion, followed by the Middle East at \$14.8 billion, the EU-28 at \$11.3 billion and a rather more modest \$9.7 billion for Asia and \$0.4 billion for Oceania.

Direct GDP of Inbound Muslim Tourism as a % of Inbound Tourism GDP, 2017

When looking at inbound Muslim tourism expenditure as a percentage of inbound tourism GDP for 2017, Middle Eastern countries still have the highest reliance on Muslim tourism, with all five of the most reliant countries originating from this region.



Direct GDP of Inbound Muslim Tourism as a % of Inbound Tourism GDP, 2017, nominal \$m

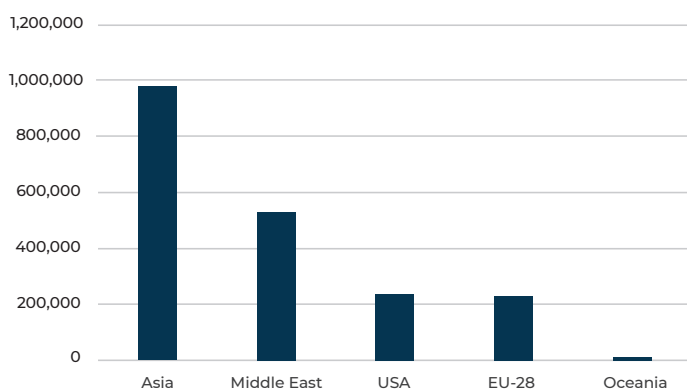


Saudi Arabia tops the list at 77.9%, closely followed by Iran at 76.8%, Qatar at 64.4%, the United Arab Emirates (U.A.E.) at 51.3% and Egypt at 39%. That the Middle Eastern countries should rely so heavily on income from Muslim tourists is hardly a surprise, given their strong positioning as destinations in which it is easy to visit as a Muslim traveller. The USA and EU-28 are barely dependent on Muslim tourism as a generator of overall tourism GDP at all, at 8.3% and 8% respectively.

Direct Employment of Muslim Tourism, 2017

Muslim tourism continues in 2017 to provide plenty of employment opportunities within the tourism industry – close to 2 million are directly employed throughout Asia, the Middle East, EU-28, the USA and Oceania.

Direct Employment of Muslim Tourism,
2017, persons



*Similarly to 2016 results, almost half of those jobs were located in Asia, employing **979,000** people, whilst the Middle East was half of that, at **528,000**.*

Employment of Muslim Tourism, 2017, persons

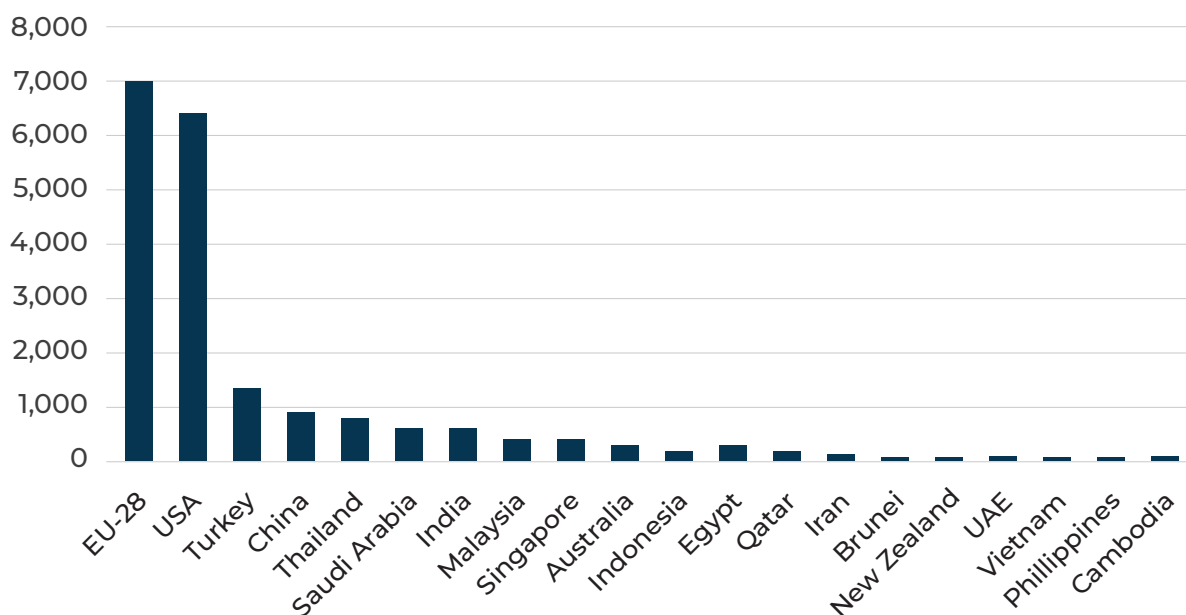


Tax Impact of Muslim Tourism, 2017

Muslim travel does not only support employment, but also generates tax payments which in turn benefit the country. From sales taxes collected on tourism goods and services, to those same companies who sell the services in turn paying corporation taxes, property taxes, licenses and service fees, as well as the companies' employees paying income tax on their wages – all indirectly generate benefits for the inbound country.

*The total tax impact world-wide of Muslim travel grew from **\$18.6 billion** in 2016 to **\$19.5 billion** in 2017.*

Tax Impact of Muslim tourism, 2017, nominal \$m



GDP & Employment from the Muslim Travel Supply Chain

Just as the tax impact from the Muslim travel sector is diverse, so too is the GDP and number of jobs generated indirectly from this segment. From food producers to cleaning contractors, marketing agents to vehicle manufacturers, and IT companies to professional services for tourism firms, all are affected by the growth or decline of the Muslim tourism market.



In 2016, the total GDP generated was approximately \$39 billion, with 1.3 million people employed.



This increased to a total GDP generated in 2017 of \$40.8 billion and 1.4 million people employed.

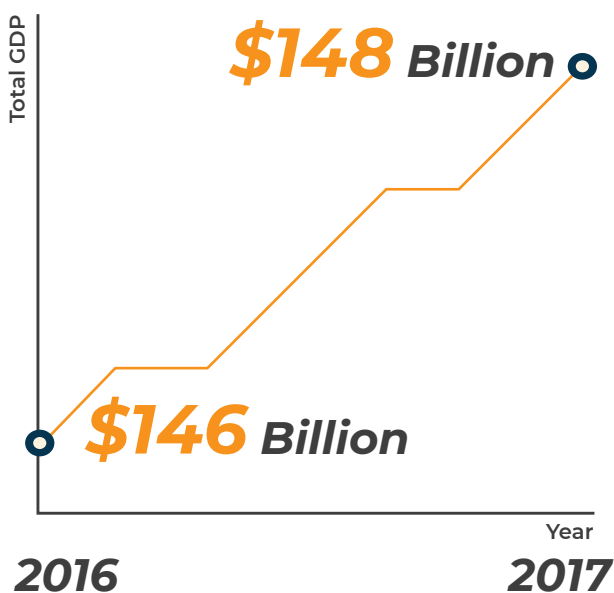


Total GDP & Employment of Muslim Tourism Economies, 2017

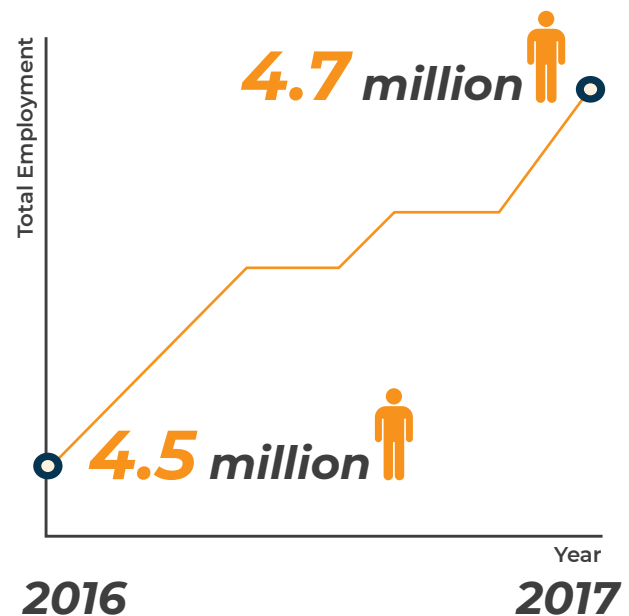
By combining the direct and indirect impact of Muslim travel, the total economic impact can be projected.

In 2017, the worldwide impact of Muslim tourism reached \$148 billion and 4.7 million employed, up from \$142 billion and a total employment of 4.5 million people in 2016.

Total GDP



Total Employment





Global Economic Impact of **Muslim Tourism** from 2017 – 2020: **The Future**

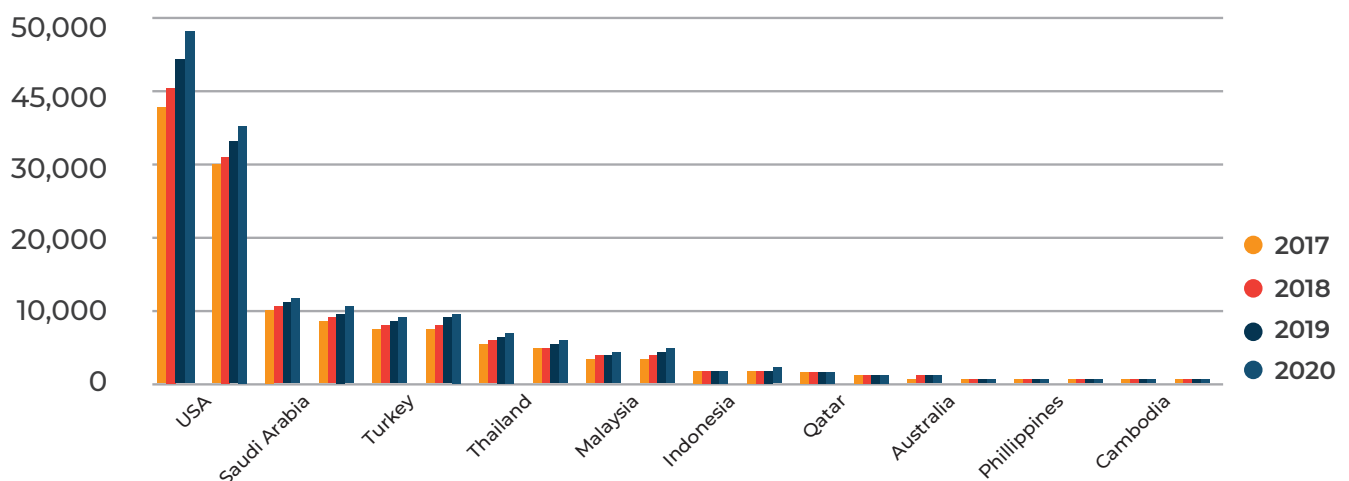
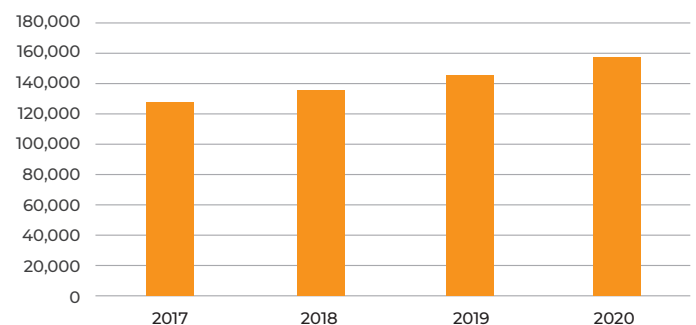
As we have seen, 2017 showed impressive growth from the Muslim tourism sector: what do the next few years have in store? In this section of the report, we look at a snapshot over 4 years, from 2017 to 2020, and explore the impact of Muslim tourism.

2017 to 2020

Projected Inbound Muslim Tourism Expenditure, 2017 – 2020

In 2017, inbound Muslim travellers spent an estimated \$127 billion. That's forecast to rise to an impressive \$157 billion by 2020.

Projected Inbound Muslim Tourism Expenditure,
2017 – 2020, \$m

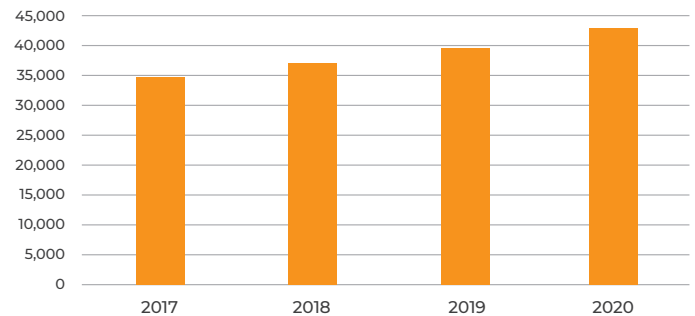


USA Projected Inbound Muslim Tourism Expenditure, 2017 – 2020

The largest single recipient country of this inbound expenditure is the USA – alone, it collected 29% of the total spend in 2017 at \$34.7 billion, and is set to rise to a 30% share, with \$43 billion spend by 2020.



USA Inbound Muslim Tourism Expenditure, 2017 – 2020, \$m

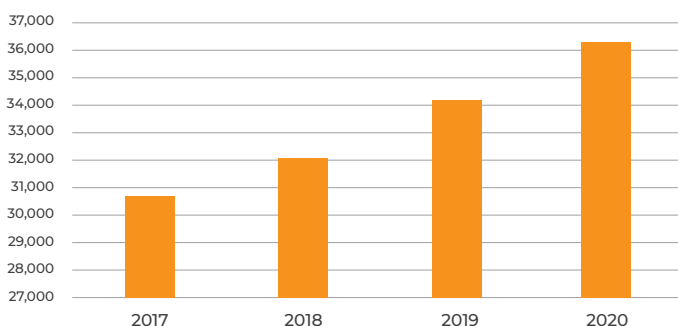


However, its trajectory is far from steady, dipping from \$35 billion in 2015, and only forecast to pick up again in 2018. As we have briefly touched upon in our 2017 review, the chief reason for this decline is due to the new visa policy, with nationalities from certain Muslim countries banned from entry.

This has hurt the overall appeal of the USA as a Muslim-friendly destination, as well as physically limiting the number of tourists. However, the USA is a perennial favourite destination to visit and the effects of this travel ban are predicted to be short-term.

EU-28 Projected Inbound Muslim Tourism Expenditure, 2017 – 2020

EU-28 Inbound Muslim Tourism Expenditure, 2017 – 2020, \$m



The second largest region benefiting from inbound Muslim traveller spend is the EU-28, accounting for 24% of the total spend at \$30.1 billion in 2017. However, whilst spend is set to increase to \$35.3 billion by 2020, their share of the total market is projected to decline to 23%.

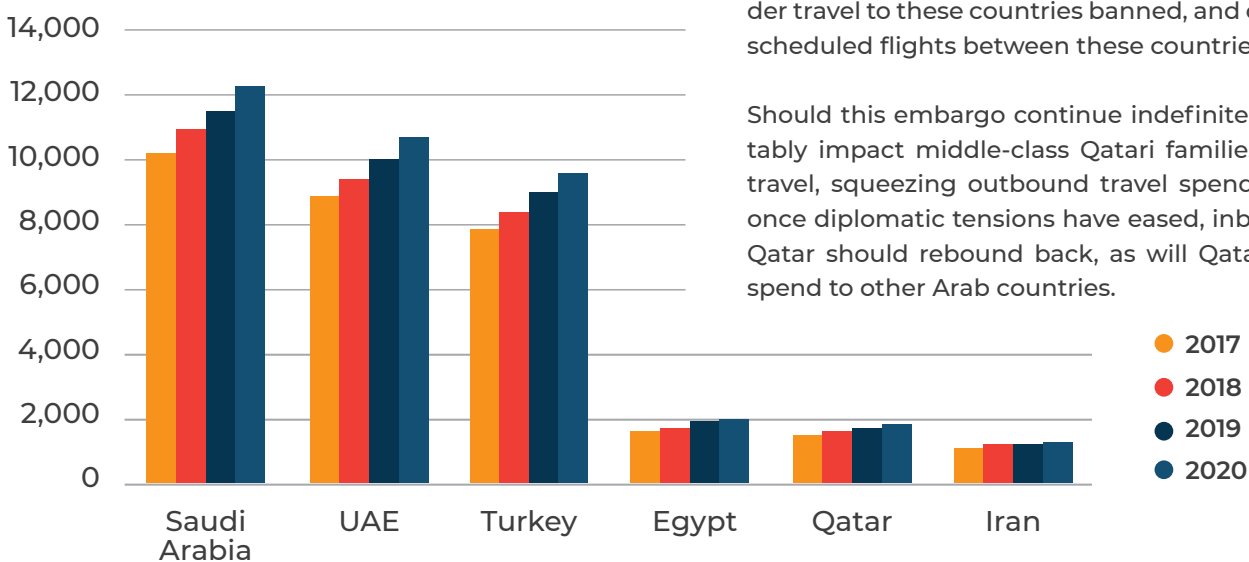
Multiple factors come into play for the weakening spend in Europe. These include fears over traveller safety due to the increased number of terrorist attacks taking place across Europe in 2016 and 2017, as well as the rise of extreme right political groups and intolerance which may propagate the image of Europe as a place which is becoming increasingly unfriendly towards Muslim travellers.



Middle East Projected Inbound Muslim Tourism Expenditure, 2017 – 2020

The Middle East is also a chief recipient of inbound Muslim tourist spend, and, similarly to the EU-28 and the USA, faces its own challenges when it comes to growth. Whilst spend is a healthy \$30.5 billion in 2017 and projected to grow to \$36.8 billion by 2020, its share of inbound market spend declines to 24% of the total market.

Middle East Inbound Muslim Tourism Expenditure, 2017 – 2020, \$m



Saudi Arabia and the U.A.E. are the top recipients of Middle East inbound spend, and this is set to increase over the next 4 years, both being very attractive destinations for Muslim travellers.

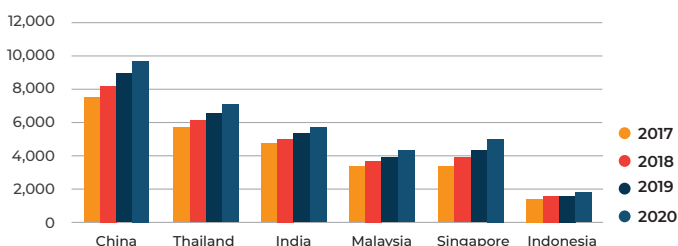
However, the driving factor behind the slowing in growth of inbound Muslim tourism spend is the region's political instability: in particular, Qatar is projected to experience a relatively flat inbound spend. This is due to the embargo with the U.A.E., Saudi Arabia, Egypt, Yemen, Bahrain, Libya and the Maldives, with cross-border travel to these countries banned, and cancellation of scheduled flights between these countries.

Should this embargo continue indefinitely, it will inevitably impact middle-class Qatari families' appetite for travel, squeezing outbound travel spending. However, once diplomatic tensions have eased, inbound travel to Qatar should rebound back, as will Qataris' outbound spend to other Arab countries.

Asia Projected Inbound Muslim Tourism Expenditure, 2017 – 2020

The one region which has experienced unexpected growth in Muslim tourist inbound spend and total market share is Asia. From \$26.9 billion in 2017, it is forecast to grow to \$34 billion by 2020 with a market share of 22%.

Asia Inbound Muslim Tourism Expenditure, 2017 – 2020, \$m



Stand-out countries such as China, Thailand and Singapore are set to take a larger percentage of that regional spend. Despite not traditionally being perceived as Muslim-friendly destinations, these countries and others in the region are waking up to the potential of the Muslim travel market, and their tourism boards are launching aggressive marketing campaigns to lure travellers to visit their countries, considered 'new' destinations for the Muslim market.



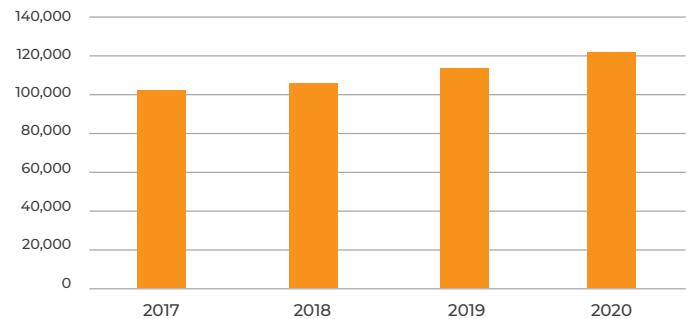
From **\$26.9 billion** in 2017, it is forecast to grow to **\$34 billion** by 2020.

Projected Outbound Muslim Tourism Expenditure, 2017 – 2020

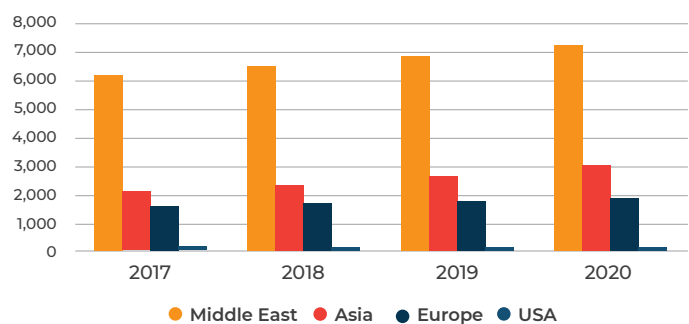
Total outbound Muslim tourism expenditure is projected to develop at similar rates to inbound Muslim tourism expenditure, from \$101 billion in 2017 to \$122 billion by 2020



Total Outbound Muslim Tourism Expenditure, 2017 – 2020, nominal \$m



Outbound Muslim Tourist Expenditure by Region, 2017 – 2020, nominal \$m

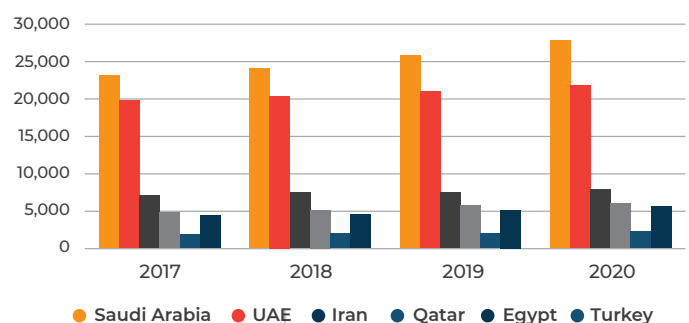


Middle East Outbound Muslim Tourist Expenditure by Region, 2017 – 2020

The Middle East dominates as the region with the highest outbound travel expenditure with a total of 59% of the overall spend, and \$72 billion by 2020. From here, we can see that it is Middle Eastern travellers who are the prime force behind the growth of the outbound Muslim travel spend.

However, not all Middle Eastern countries are equal when it comes to outbound spend. Whilst Saudi Arabia and the U.A.E. are forecast to contribute an impressive 41% of the total spend worldwide by 2020, weaker countries in the Middle East such as Turkey and Egypt, as we have seen, show a decline rather than an increase. However, as the overall situation stabilises, their spend is set to grow again by 2020.

Middle East Outbound Muslim Tourist Expenditure by Country, 2017 – 2020, nominal \$m



USA

Outbound Muslim Tourist Expenditure by Region, 2017 – 2020

When we examine those countries whose citizens are driving outbound Muslim expenditure, there is one immediate difference – that of the USA. Whilst the USA receives the lion's share of the total inbound spend at 30% by 2020, American Muslim travellers account for only 1% of the overall outbound spend in the same year, generating \$1.8 billion.

EUROPE

Outbound Muslim Tourist Expenditure by Region, 2017 – 2020

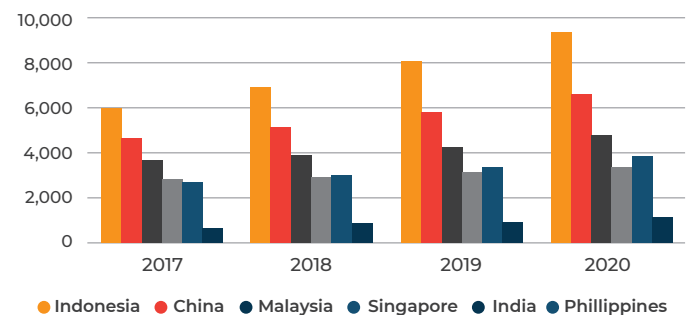
Outbound Muslim travel spend remains flat for Europe, forecast to grow to \$18.5 billion by 2020, with approximately 15% of total spend.

In 2017, we saw a decline in spend from the UK. However, this is set to pick up again by 2020, as the economy adjusts.

ASIA Outbound Muslim Tourist Expenditure by Region, 2017 – 2020

A region forecast to grow fast from \$20.9 billion in 2017 to \$29.6 billion in 2020, is Asia. Powered by prosperous economies, a growing middle class and a younger generation of travellers, by 2020 Indonesia, China and Malaysia are set to contribute circa 17% of the total global Muslim outbound expenditure, outpacing the entirety of the European countries within the study, who will contribute just 15% between them.

Asia Outbound Muslim Tourist Expenditure by Country, 2017 – 2020, nominal \$m



Projected Direct GDP of Inbound Muslim Tourism, 2017 – 2020

As the largest recipient of outbound travel spend, it follows that the USA would also have the highest GDP for an individual country, expected to reach \$21.4 billion by 2020.

The Middle East comes in second place, with a projected \$18 billion by 2020, whilst Asia is rapidly closing the gap with Europe, at \$12.6 billion and \$13.3 billion respectively.



Projected Direct GDP of Inbound Muslim Tourism as a % of Inbound Tourism GDP, 2017 – 2020

As we saw in 2017, the Middle East is highly reliant on inbound Muslim tourism as a percentage of their inbound GDP, and this will continue over the next few years.

Saudi Arabia has the highest reliance on inbound Muslim travellers for their total inbound tourism GDP, projected to reach 78% of overall tourism GDP by 2020. This is hardly remarkable given its importance as a place of pilgrimage for Umrah and Hajj for Muslim travellers, as well as a perceived unfriendliness towards non-Muslim travellers.

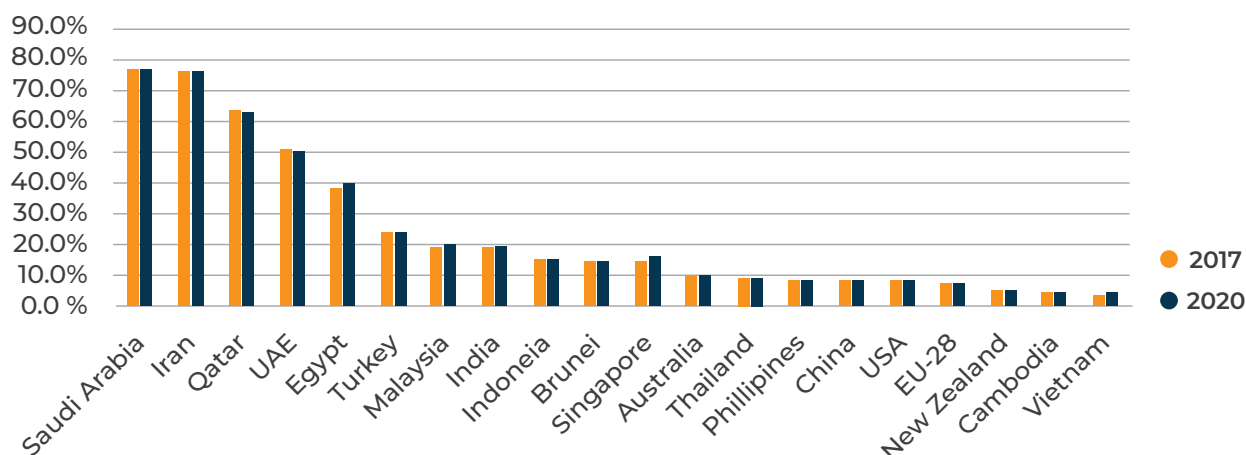
Aware of this reliance, in its Vision 2030 strategy, Saudi Arabia plans to diversify its economy by focusing on tourism beyond simply a destination for pilgrimage. Instead, Saudi Arabia wants to highlight its archaeological sites, monuments, nature reserves and beaches, with plans afoot even for a luxury Red Sea resort, and a 'Riviera of the Middle East'. New tourist visa conditions, potentially opening the country up to more non-Muslim tourists, were announced in April 2018 for tourists

travelling with government approved travel agencies, and plans for new, event visas were announced in October 2018.

As in 2017, countries such as the USA and the EU-28 region, have very little dependency on Muslim inbound GDP as a percentage of total inbound GDP from tourism, and this is not forecast to change by 2020. These destinations see huge numbers of visitors every year from all segments, and Muslim travel counts for a small segment within those.

Where inbound Muslim GDP has an unexpected impact on overall tourism GDP are for countries such as Australia, projected to account for 10.3% by 2020, Singapore for 16.5% and Thailand for 9.5%. What is remarkable is that these are not Muslim-majority countries, yet the Muslim tourism industry still manages to create a considerable impact on overall tourism GDP.

Direct GDP of Inbound Muslim Tourism as a % of Inbound Tourism GDP, 2017 vs 2020, nominal \$m



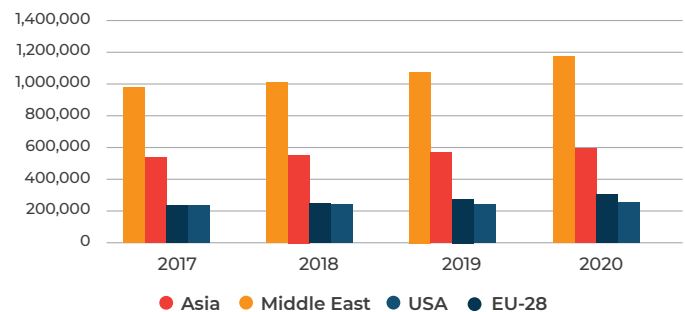
Projected Direct Employment of Muslim Tourism, 2017 - 2020

In 2017, the Muslim sector supported 2 million jobs, predicted to grow to 2.3 million by 2020.

Of these, 1.2 million will be in Asia alone by 2020, with the fastest growth of all the regions in this study combined. More than 700,000 of these jobs are in Southeast Asia (Thailand, Malaysia, Singapore, Indonesia, Brunei, Vietnam, Philippines and Cambodia) alone.

Thailand benefits the most from direct employment from Muslim travel, with a predicted 320,000 jobs supported by the Muslim travel market by 2020. This is largely due to the large size of the country's tourism industry.

Direct Employment of Muslim Tourism, 2017 - 2020, persons



However, the USA is not far behind Thailand, with just over a quarter of a million people employed by the Muslim tourism industry in 2017, and set to grow to 300,000 by 2020, creating thousands of job opportunities. However, growth levels remain relatively stable over the next four year period compared to the swift growth we are likely to see in the Asian market

Projected Tax Impact of Muslim Tourism, 2017 – 2020

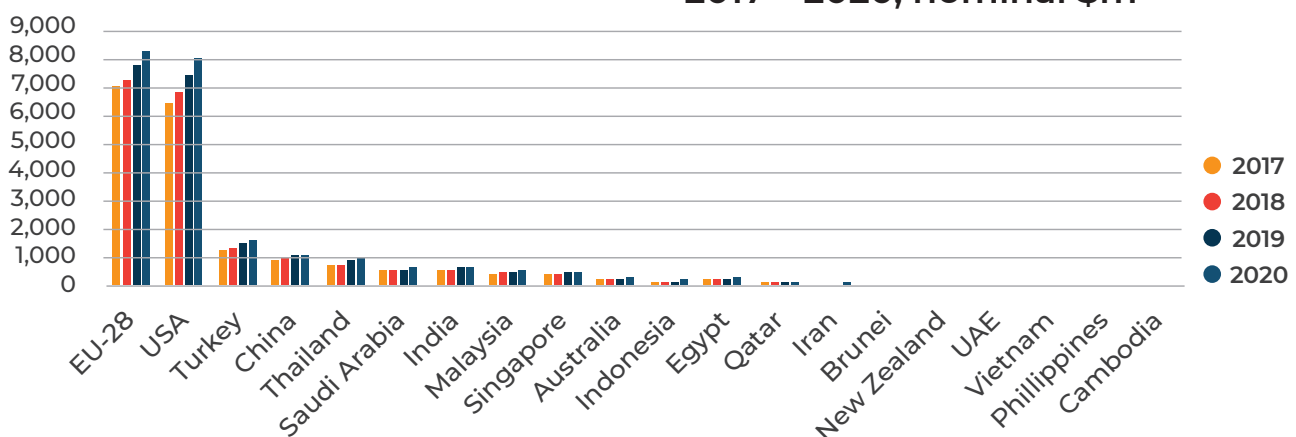
Similarly to Muslim inbound tourism expenditure, the USA and the EU-28 are the chief beneficiaries of this, collectively set to receive \$16.4 billion in taxes by 2020, or almost two thirds of total tax generation, due to higher sales taxes imposed and greater visitor numbers.

Other countries with a notable tax impact from Muslim inbound tourism are China at \$1.1 billion and Thailand at \$1 billion, coming in fourth and fifth respectively.

Despite the high number of inbound visitors to the Middle East, the impact of tax collection from Muslim tourism is very low, due to the lack of sales taxes levied by many of the countries within this region.

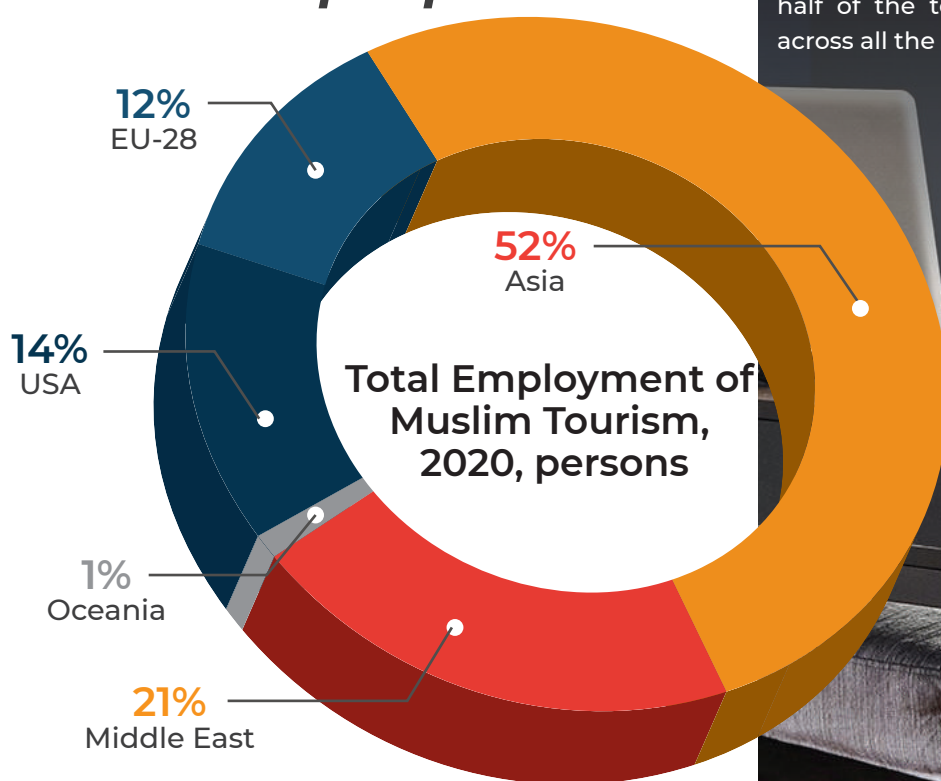
The total tax impact worldwide of Muslim travel is set to grow from \$19.5 billion in 2017 to \$24 billion by 2020.

Tax Impact of Muslim Tourism, 2017 – 2020, nominal \$m

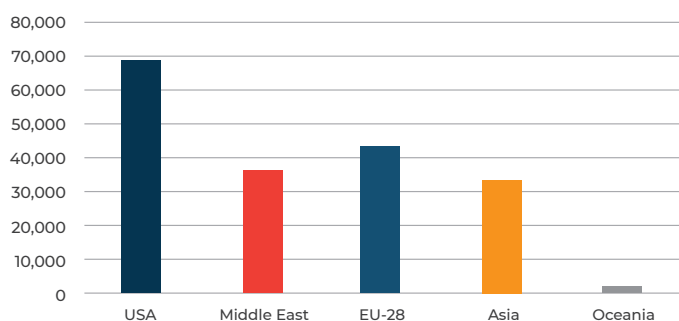


Projected Total GDP & Employment of Muslim Tourism Economies, 2017 – 2020

The total economic impact of Muslim Tourism Economies is forecast to be *\$183 billion*, with *5.6 million employed* by 2020, from 2017's *\$148 billion* and *4.7 million people*



Total GDP of Inbound Muslim Tourism, 2020, nominal \$m



The USA and Europe retain the greater benefit of this total impact, with 62% of the total GDP generated, at \$112 billion, and 1.5 million people employed resulting from Muslim tourism.

The Middle East counts for 19% of the total GDP generated by 2020, with \$36 billion, but Asia is rapidly catching up and by 2020 should reach \$33 billion, an impressive number for a region still regarded as 'new' for Muslim travellers.

When it comes to total employment generated from the Muslim tourism economy, Asia dominates. In 2017 it employed 2.4 million people, but is projected to be close to 3 million by 2020, supporting over half of the total employed from Muslim tourism across all the countries measured in this report.





How to take Advantage of the Muslim sector's growth

Introduction

By 2020, Muslim travellers are set to generate \$183 billion and employ 5.6 million people.

This is no small trend, easily disregarded. It represents an enormous opportunity for those countries and organisations who can successfully address the Muslim market's needs – and an enormous threat for those who ignore its impact.

Muslim travellers have never let their religion prevent them from travelling – right back from the 9th century, Islamic explorers such as Abu al-Hasan al-Mas'udi, the 'Herodotus of the Arabs', and Ibn Battuta travelled the world, examining the culture, geography and history of far-flung countries.

In the 21st century, Muslim travel is accelerating at an ever-faster speed, and brings with it millions of travellers who want to see the world in a faith-compatible manner. Being able to tap into this growth means that all tourism industry stakeholders must have a clear understanding of what the broad tenets of Muslim-friendly travel are.

In this section of our report, we examine those faith-based needs, which stakeholders within the industry they affect, and how stakeholders can take advantage of those needs to emerge successful and capture market share.

As we can see, many of these questions overlap multiple stakeholders, but one stakeholder appears many more times than the rest – the National Tourism Organisation (NTO).

This one stakeholder, above all, must communicate Muslim travellers' needs and challenges to the other stakeholders whose interests they represent – hotels, Destination Management Companies (DMCs), attractions, airlines, airports and so on – and advocate for changes to be made at a ground-level to create a welcoming destination for Muslim travellers.

Let's look at a Muslim traveller's basic concerns as to how they can travel in a way in which is compatible with their Islamic beliefs:

Consumer's challenge	Stakeholder affected
How can I find somewhere to pray and eat at the airport?	<ul style="list-style-type: none"> ● Airport ● National Tourism Organisation (NTO) ● Airline
How can I get halal in-flight meals?	<ul style="list-style-type: none"> ● Airline
I need my hotel to have a prayer mat and halal meal options	<ul style="list-style-type: none"> ● Hotel ● NTO
Where can I find Muslim-friendly hotels to book online?	<ul style="list-style-type: none"> ● Hotels ● NTO ● Destination Management Company (DMC) ● Online Travel Agency (OTA)
Where can I find a clean and comfortable prayer room for my afternoon prayers?	<ul style="list-style-type: none"> ● NTO ● DMC ● Attractions ● Restaurants
Where can I find travel information about Muslim-friendly hotels/ restaurants/ attractions?	<ul style="list-style-type: none"> ● NTO ● Hotels ● Attractions ● OTA
Where can I find 'authentic' halal food?	<ul style="list-style-type: none"> ● NTO ● Restaurants
How do I know if the food is really halal? What certification is used?	<ul style="list-style-type: none"> ● NTO ● Hotels ● DMC ● Travel Agency
How can I travel during Ramadan?	<ul style="list-style-type: none"> ● NTO ● Hotels ● DMC
How can I have a more authentic and adventurous holiday?	<ul style="list-style-type: none"> ● NTO ● DMC

The challenge: How can I find somewhere to pray and eat at the airport?

Stakeholders affected: *NTO, Airports, Airlines*

The opportunity: *becoming the airport of choice for Muslim travellers*

Whilst not a key driver in destination choice itself, considering a Muslim traveller's needs at all stages of their trip is important.

Finding a suitable space for prayer whilst at the airport, whether at departures or arrivals, is one of those subtle ways in which Muslim tourists can feel instantly welcomed in a country. Furthermore, airport facilities, particularly those for transits, play a key role in a passenger's decision about which airline to choose. Major transit hubs, such as Doha in Qatar, Dubai and Abu Dhabi in the U.A.E. and Singapore, all offer easily accessible prayer rooms with ablution facilities.

However, airports need to take one step further than merely having these rooms, but should actively promote their existence through clear signage, information on the airport's website, and collaborating with national airlines to publicise their existence.

Likewise, ensuring that there are options for Muslim travellers to find food and beverage options at the airport is important, increasing the overall spend, as well as creating a more comfortable experience for the traveller.

Airports should regularly review the meal options for Muslim travellers available, and encourage food and beverage outlets to consider this market when drawing up their menus. How feasible it is for these outlets to provide halal certified food may be limited, but with the knowledge of what is on offer, airports can at the very least signpost Muslim travellers to those outlets serving pork-free and alcohol-free foods, or are vegetarian-friendly.

For airports in non-Muslim majority countries, it can be a challenge to establish space for a prayer room and calculate the ROI of the modest spending required to build them. However, the press coverage that this can generate once opened can be considerable, often featured in local as well as Muslim travel specific media outlets.



The challenge: How can I get halal in-flight meals?

Stakeholders affected: Airlines

The opportunity: increase ancillary revenue for the airline, loyalty from customers.

Hand-in-hand with the availability of halal meal options and prayer rooms at airports is the providing of halal in-flight meals by airlines.

Whilst not a major issue for short-haul flights, where many travellers prefer not to purchase a meal, long-haul flights provide their own unique problem: how can a traveller ensure that they are eating food which is compatible with their faith?

Of course, handling diverse dietary requirements is nothing new for airlines, and so the addition of halal pre-ordered options should be relatively straight-forward. Indeed, many airlines already accommodate this to make for a pleasant flight experience.

Middle Eastern airlines such as Emirates, Etihad and Qatar Airways serve halal-certified meals to all passengers, thereby increasing the number of meal options for a Muslim traveller who no longer has one pre-defined option, but can choose from the regular selection. Other carriers should follow this model by offering more meal options for Muslim travellers on long-haul flights, to win the customer's loyalty. First steps could be as simple as making a switch from offering pork and lard-containing meals to other meat options.

During the month of Ramadan, they should be sensitive to customers who may wish to eat at different times for fasting reasons.

For short-haul flights, airlines should ensure that they have one or two snack options which are Muslim friendly, and that the cabin crew are adequately briefed to be able to advise travellers with certainty that they are consuming halal food. By doing this, they can increase the ancillary revenue opportunities for in-flight purchases of food and drink from Muslim consumers.



Halal In-Flight Meals



The challenge: I need my hotel to have a prayer mat and halal meal options

Stakeholders affected: *NTO, Hotels*

The opportunity: *open up a new market segment for hotels.*

Once the flight is booked, the next question for any traveller is usually: where will I stay? To make their Muslim guests' stay a more convenient one, hotels should consider some easy-to-implement steps, such as having prayer mats, a copy of the al-Quran and the qibla direction in guestrooms.

These can be either permanent fixtures, or, if the hotel worries that they may alienate their non-Muslim guests by displaying them in such a prominent place, could be on a 'request' basis, with a simple information sheet detailing all the facilities which Muslim travellers can expect.

Hotels could go the extra mile to win customer loyalty by judging from the guests' names or nationality if they may require these amenities and contacting the guests pre-stay to confirm their requirements.

Upon check-in to the hotel, the check-in desk can hand Muslim travellers a list with prayer times during their stay, the nearest mosque, as well as advise whether there are halal meal options at the hotel itself. If there are no halal meal options on site, they could provide travellers with a list of recommended halal certified restaurants close to the hotel, to make their travel stress-free.

All the information about what facilities the hotel provides for Muslim travellers should also be clearly stated on the hotel website, ideally within a separate section aimed just at this segment. Hotels should also provide this information to all sales channels used to promote the hotel, including major Online Travel Agents (OTAs), wholesalers and partner travel agencies, to increase visibility.

NTOs need to work closely with hotels, especially independent and smaller ones, to educate them on these simple steps to make their hotels more Muslim-friendly. Once the hotel has complied with these steps, it should also be the NTO's responsibility to publicise these facilities, reinforcing the image of a destination with many Muslim friendly options.



The challenge: Where can I find Muslim-friendly hotels to book online?

Stakeholders affected: *NTO, Hotels, DMC, Online Travel Agency*

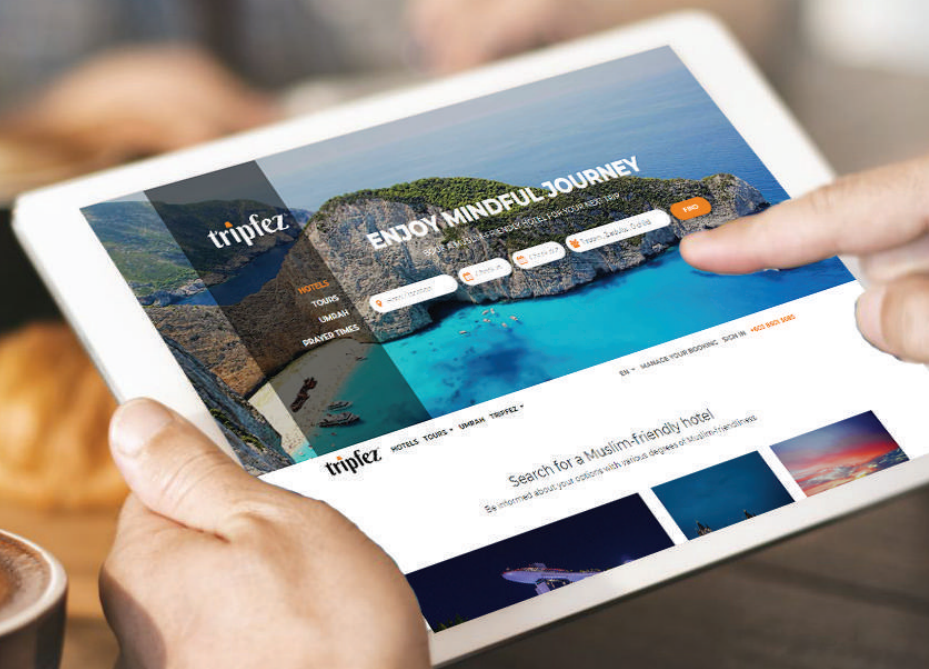
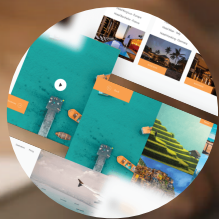
The opportunity: *capture the online Muslim market.*

As we have seen from our report, the majority of outbound Muslim travellers come from countries such as Saudi Arabia, Indonesia and the U.A.E., who have a rapidly growing number of younger travellers, with many of the residents below 25 years old². This change in demographics is also reflected in the way in which these travellers wish to book – they no longer want to visit an offline travel agency to book their travels, but expect to be able to do it online, and easily.

Ensuring that there is a high enough penetration of Muslim-friendly hotels online is a challenge for each destination, and one that the NTO should spearhead, again, by education. Seminars on how to maintain property websites, optimise for search engines and get distributed by online channels should be regular occurrences.

Here is a particularly ripe field for travel technology startups who wish to play in this space, creating dedicated Muslim travel portals which guide these travellers where to book faith-friendly accommodation. An additional revenue stream for them could also be to provide consulting services to hotels, getting them Muslim market-ready and at the same time, expanding the inventory of properties available which can be booked online.

ONLINE BOOKING



²<https://www.oxfordbusinessgroup.com/analysis/dividend-or-liability-meeting-needs-region%E2%80%99s-growing-youth-population-0>

The challenge: Where can I find a clean and comfortable prayer room for my afternoon prayers?

Stakeholders affected: **NTO, DMC, Attractions, Restaurants**

The opportunity: **increase revenue by providing a place to pray.**

Whilst morning and evening prayers can usually be performed at the hotel, afternoon prayers, taking place usually around lunchtime, mid-afternoon and early evening, can provide Muslim travellers with an inconvenience if they cannot locate an adequate prayer room. Muslim travellers must schedule their day's sight-seeing around being near a convenient place to pray – that could mean that they may potentially choose to only visit the area close by to their hotel, restricting both their mobility and spending power.

For the Dhuhr prayers around lunchtime, a solution is finding a clean space to pray at their lunchtime dining venue – and if a certain restaurant is known for having a dedicated prayer space, the number of travellers seeking out this restaurant for convenience's sake is bound to increase, as will their daily takings. The same goes for the Maghrib prayers, taking place early evening, usually around dinnertime.

The Asr prayers, falling mid-afternoon, provide an opportunity for attractions to provide small prayer rooms. Following the same principle of the restaurants above, if the place is known and promoted as being Muslim friendly, it stands to reason that it will be more frequented by Muslim travellers who appreciate this thought – and will become a must-see or do place for that afternoon's itinerary.

Here, DMCs must also play a role when creating itineraries for groups of Muslim travellers. They must be thoughtful to schedule in time during the day for prayers, at a suitable location – it is not enough to consider the halal meal requirements only.

DMCs can work together with restaurants and attractions to find alternatives when dedicated prayer rooms are not available, such as a couple of empty, clean rooms, and make the experience of faith-compatible travel much more enjoyable without wasting precious holiday time.



The challenge: Where can I find travel information about Muslim-friendly hotels/ restaurants/ attractions?

Stakeholders affected: *NTO, Hotels, Attractions, Online Travel Agencies*

The opportunity: *highlight a destination as Muslim friendly.*

Google's travel customer journey micro-moments study has shown four stages of journey planning: I-want-to-get-away moments, Time-to-make-a-plan moments, Let's-book-it-moments and Can't-wait-to-explore moments³. To influence a Muslim traveller's destination, as well as flights, hotels and attractions booking choice, it's key to ensure that it is easy to find information online about how Muslim-friendly that destination is.

When travellers first start planning their trip in their I-want-to-get-away moment, one in three have still not typically finalised the destination. NTOs must lead the way in providing online content which is specific to Muslim travellers and can be discovered during this dreaming phase. Creating micro sites dedicated to Muslim travellers for the destination, or dedicating specific sections to this topic on the NTO's main website will mean that their destination shows up in this online research, making it a more credible candidate for their holiday.

This online content need not solely display lists of Muslim-friendly hotels, attractions and restaurants, but instead should feature inspirational articles that show how other Muslims have travelled and enjoyed themselves in the country, as well as the usual information on the reasons why to visit the country. It is not enough to simply say that it is a Muslim-friendly place, but it should excite and engage the reader via images, videos and words.

During the Time-to-make-a-plan and Let's-book-it moments, it is essential that airports, airlines and hotels have a visible online presence, again with Muslim-specific webpages and information to reassure the customers and help travellers narrow down the options.

Lastly, for the Can't-wait-to-explore moments, attractions and restaurants should also promote their Muslim friendliness on their own websites, NTO websites, mobile apps and listing sites.

Again, there is a particularly ripe opportunity for OTAs who choose to focus on this sector. They can approach each journey with a holistic framework, from general information about the destination to in-destination specific apps with information about prayer times, local mosques and recommended places to eat and pray. Providing this in-destination information will engender customer loyalty and encourage them to research and book their next trip with the same company.

And of course, printed materials in Tourism Information offices and overseas offices are helpful too, so that all Muslim travellers feel welcomed and can easily find faith-compliant destination knowledge, whether they are web-savvy or not.



³<https://www.thinkwithgoogle.com/marketing-resources/micro-moments/micro-moments-travel-customer-journey/>

The challenge: Where can I find 'local' Halal food?

Stakeholders affected: *NTO, Restaurants*

The opportunity: *capture the Muslim sector with local halal food.*



All travellers love to try out the local cuisine when they are in a new country, and Muslim travellers are no exception – their challenge is finding food that reflects these new tastes, yet is halal.

A fear of not being able to find halal food is one of the primary drivers when Muslims select a potential holiday destination, and the first source that they are likely to turn to? The internet and family and friends' personal experiences of travelling to that country.

If they cannot find enough persuasive information that it will be easy to find Muslim-friendly food on a trip, they may well choose another destination. Or if they find plenty of information on halal food, it might tip the scales in that country's favour.

An NTO's role here is three-fold: first, they must educate local restaurants on the potential of the Muslim market and what exactly halal food is and is not, encouraging a decent number to try their hand at catering their local food for these requirements and complying with halal certification, so that tourists can have a choice when it comes to selecting their dining venue, as well as it being 'halal'.

The second is reaching out to the local Muslim community, and compiling a list of halal-certified restaurants, as locals will certainly be knowledgeable on where these restaurants are if they do exist. The third is making information on finding halal food easily accessible – whether it is via the official tourism website, a dedicated mobile app or even a printed listing circulated at local and overseas tourism offices.

Restaurants must educate themselves on what is necessary if they wish to qualify as 'halal', or at the very least, should consider giving basic training to their serving staff on alternatives that Muslim guests may be served – seafood or vegetarian options, for example, which have been cooked with no alcohol or lard, enabling travellers to try local cuisine.



The challenge: How do I know if the food is really halal? What certification is used?

Stakeholders affected: NTO, Hotels, DMC, Travel Agency

The opportunity: a standardised halal certification across the country eases scepticism.

The misuse of the word 'halal' has had many a Muslim traveller become sceptical of whether the food they are eating is truly halal or not. Playing such a pivotal role in the requirements for travelling overseas, it's imperative that NTOs use their cooperation with the government to ensure that certification is standardised across the country, so that travellers can be reassured that what they are eating complies with their beliefs.

If there is an official halal certification body within that country, the NTO should work with them closely, keeping an updated list of restaurants which have achieved this status.

They should then also issue clear guidelines to stakeholders such as restaurants and DMCs on using terms such as 'Muslim friendly', 'halal' or 'pork-free', with appropriate levels of clarity communicated. 'Pork-free'

might mean other meats are served which are still not slaughtered in the halal way, whilst 'halal' should only ever mean halal certified by the Islamic authority within that country, to avoid being misleading.



The challenge: How can I travel during Ramadan?

Stakeholders affected: *NTO, Hotels, DMC*

The opportunity: *being flexible makes year-round travel possible for Muslims.*

Muslim travellers abroad during Ramadan face two challenges. The first of course is the exhaustion that inevitably comes with fasting during daylight hours, but the second is related to the food itself, and finding places which will accommodate the morning meal of Suhur, taken before sunrise, and Iftar, the breaking of the fast.

DMCs should be sensitive to their Muslim customers who are travelling during Ramadan and need to adapt their daily schedules accordingly, starting early and packing in more attractions during the morning, with less strenuous activities in the afternoon.

Hotels must also be sensitive to the challenges that Ramadan brings when it comes to meal timings. In those countries where dawn is much earlier than the usual breakfast opening times, hotels can consider opening especially early for their Muslim customers to eat, or preparing breakfast boxes if a full kitchen staff is impractical.

Likewise, if Iftar falls after the kitchen has normally closed, hotels can consider staying open later, or allowing guests to order a special room service that would provide them with a hearty dinner. These small steps will make guests feel more at home and enhance their overall experience.

NTOs should focus on the selling point of the uniqueness of celebrating Ramadan in a different country – making it clear where Muslim travellers could connect with the local Muslim community to celebrate, or highlighting how previous Muslim travellers have had an enjoyable time whilst visiting over this period, to reassure consumers.



The challenge: How can I have a more authentic and adventurous holiday?

Stakeholders affected: **NTO, DMC**

The opportunity: **roll-out Muslim-friendly strategies to a whole country, so the whole country can benefit from Muslim inbound travel spend.**

A worldwide trend for holidaymakers is to experience the 'authentic' side of a destination, and Muslim travellers are no different, especially the younger generation. They want to be able to eat the specialities of the country, venture out into far-flung villages and get an overall feeling of what the destination is like – without being hindered by their faith.

Indeed, so long as NTOs and DMCs take into account all the factors above – expanding the number of halal or Muslim-friendly restaurants, encouraging hotels to offer Muslim-friendly amenities and being transparent about the overall experience which the destination has to offer, then it should be relatively simple to ensure that Muslim travellers can have an authentic holiday.

Once Muslim-friendly strategies have been implemented in tier one cities, they should be expanded to smaller cities and towns, all the while encouraging regional tourism boards to play their part in educating stakeholders and promoting the ease with which a Muslim traveller can authentically experience that destination.

NTOs should ensure that DMCs have inventory and itineraries in place which enable travellers to experience a more authentic side of the country in a faith-compatible way, rather than sticking to the 'safe' options of major cities and bland restaurants serving non-local cuisine.

Once this is in place, countries can reap the benefits of a Muslim tourism infrastructure which benefits the entire country, rather than the capital city alone, which is often the case. The more Muslim-friendly a country is in its entirety, the more likely travellers will return or recommend the destination to their friends and family, in turn generating more visitors and inbound GDP.



Conclusion

One in three of the global population will be Muslim by 2060 – to ignore this trend would be foolhardy.

In 2017, we saw that the Muslim travel segment has already had a significant impact on overall tourism, generating a total GDP impact of \$148 billion and employing 4.7 million people, both directly and indirectly. By 2020 with \$183 billion and 5.6 million people employed, this impact is set to be even greater.

Even when looking just at direct employment, the Muslim travel segment will create substantial opportunities, with close to 300,000 forecast to be directly employed in the USA and 1.2 million employed across Asia.

As technology makes booking travel even easier, and as the number of flights and transportation links across the Middle East, North Africa and Asia rapidly expand, travellers are being offered a choice of destinations they would never have dreamed of visiting before. These are often destinations which have traditionally been thought of as 'difficult' for Muslims to visit, but thanks to an increasing number of NTO campaigns and informational websites dedicated to Muslim-friendly travel, are now firmly on the radar. Not only that, they are also having positive impacts on those countries' overall tourism GDP.

In the third section of this report, looking at how to take advantage of the growing Muslim travel segment, we noted that to do this does not require an entire re-think of strategy. Small steps that NTOs, DMCs, hoteliers, airlines and airports can take will ensure that they can cater to the Muslim segment easily without huge overheads or alienating non-Muslim travellers.

A whole new landscape of travel startups dedicated to solving issues faced by Muslim travel have sprung up, from sites rating a hotel's Muslim-friendliness to reminding travellers of prayer times whilst travelling, or even where to find halal restaurants on-the-go.

With such a sizeable market that is only set to grow, there are plenty of exciting commercial opportunities that are still untapped.

by **2020**

\$183 billion
total GDP impact

5.6 million
people employed



Methodology

Sources of data

This study uses tourism statistics published by the UN World Tourism Organisation (UNWTO), the World Bank, and the World Travel and Tourism Council (WTTC). The direction of Muslim travel expenditure is then estimated using Pew Global Research data on the percentage of Muslim populations in all countries worldwide. The implicit assumption is that a Muslim tourist is broadly representative of the average tourist from their home country, in terms of destination choice and expenditure levels.

Adjustments

To factor in any imprecision, raw estimates are combined with data from CrescentRating's Global Muslim Travel Index. The sub-index for Muslim Visitor Arrivals is used to weight the market size estimates. The overall global total related to DinarStandard's estimated total market size, as well as figures from the Organisation of Islamic Cooperation (OIC)'s Muslim Friendly Tourism Report. Altogether, these adjustments are intended to adjust for variations in income distributions and the travel choices of Muslim travellers.



Acknowledgement



tripfez®

About Tripfez

Tripfez is a new state-of-the-art online portal dedicated to the specific travel requirements of Muslim travelers. It features more than 200,000 properties worldwide, more than 80,000 of which are Salam Standard indexed, creating a reference and booking tool for travellers wishing to browse and book accommodation that meets their unique cultural and religious requirements. Tripfez also features various selection of tours and packages that offers Halal food among others, essentially creating an entire Muslim friendly environment.

Tripfez is fighting for something travellers have always taken for granted: the ability for an individual (in our case, a Muslim) to choose where in the world they feel like they really belong. Since its establishment, Tripfez has been growing from strength to strength, with a focus on creating value for Muslim travellers and playing a part in the growth of the Islamic Economy. We are now recognized as a leading player within the Islamic economy at large and more importantly within the Muslim travel segment.

Tripfez features one of the world's largest databases of Muslim-friendly hotels and tours across all seven continents and allows consumers to search according to a range of criteria including price, star ratings, destination and many more.

About Salam Standard

Salam Standard is a hospitality information tool dedicated to Muslim travellers, launched in October 2015. More than 50,000 hotels are already indexed on Salam Standard, which displays their Muslim-friendly amenities and services and allows users to rate and review them. Major international hospitality brands whose properties are Salam Standard indexed include Accor-Hotels, Mövenpick Hotels & Resorts and Indonesia's biggest hospitality firm, the Archipelago Hotel Group.

Salam Standard was conceived after 50,000 Muslim travellers from around the globe were surveyed to discover what services and amenities were most important to them when traveling.



SALAM
STANDARD

PEAR ANDERSON

About Pear Anderson

Pear Anderson is a boutique travel-industry consultancy firm, experts in Southeast Asian outbound tourism. They partner across the spectrum of tourism-related organisations to build a lasting foundation in SEA, a market set to be worth USD \$76 billion by 2025.

The Muslim travel segment is an additional core specialisation. With an exclusive partnership with Salam Standard, the leading Halal hospitality rating agency, Pear Anderson provide unique insight and access to this lucrative segment.



Global Accolades



Front cover of Forbes as the movers and shakers of the travel industry



With Akiko Fujita on CNBC morning live show



With Dr Mario Hardy (left), CEO of the Pacific Asia Travel Association (PATA) and Dr. Taleb Rifai (right), Secretary-General of the UN World Tourism Organization (UNWTO)



With Tan Sri Wahid Omar (centre), Chairman of Permodalan Nasional Berhad (PNB) and Dato Mohd Nizam (right), Deputy Chairman and Group CFO of Permodalan Nasional Berhad (PNB)

Media Mentions



TripFez is like TripAdvisor focussing on serving global Muslim travellers.
-BBC



A company that accommodates preferences of Muslim travelers
- CNBC



Tripfez not only helps Muslim travellers in the travel planning process, but demystifies for suppliers how to better cater for the huge halal market
- Forbes



Tripfez allows travellers to search and book hotels that comply with the needs of Muslim travellers such.
- Spark40



Tripfez launches online marketplace for Muslim-friendly tours
- Travel Daily Media



Tripfez showcases halal friendly travel solutions
- Travel Weekly Asia



Tripfez focuses on Muslim holidaymakers
- Tech in Asia



Tripfez is a TripAdvisor-Viator for Muslim travellers
- Web In Travel

.. and many more

Gallery





GLOBAL ECONOMIC IMPACT OF MUSLIM TOURISM AND FUTURE GROWTH

ANNUAL REPORT

PROJECTION:

2017– 2020

BY SALAM STANDARD



About this Report

The numbers say it all – by 2060, there will be 3 billion people globally who identify as Muslims, one in three of the world's population.

As the Muslim population grows at a rate of 70% compared to the global average of 32%, it only makes sense that the Muslim tourism market will play an ever-increasing part of tourism's overall GDP impact, in parallel to burgeoning industries such as modest fashion, and Sharia-compliant finance, also catering for Muslim consumers' unique requirements.

Countries driving this growth in the Middle East and Asia typically have a younger population, a growing affluent middle-class and a hunger to travel the world in a faith-compatible way.

In this report, we look at the progress of Muslim travel in 2017, and then take a snapshot of Muslim travel over 4 years from 2017 to 2020.

Our definition of Muslim travel covers not just faith-based travel, but all types including leisure, business and visiting family and friends overseas. We project the impact that Muslim travel will have on the tourism industry itself, in addition to the global GDP and employment effect, both directly and indirectly generated.

The report covers 70% of the world's international tourism markets, which also count for 80% of the global Muslim travel segment.



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2018

