
Halal tourism: guidelines for Oman

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Abstract: Halal tourism caters to the travel needs of Muslim tourists seeking out a family friendly environment. As per the Global Muslim Travel Index 2019, Islamic nations like Malaysia, Indonesia, and Turkey lead the halal tourism industry, while nations like Singapore, United Kingdom, Australia, etc. are also entering into halal tourism industry. Oman having all the elements of making a top destination for halal tourism is on its way out of the top rankings. It is imperative to identify the reasons behind Oman's decline in the field of halal tourism and to suggest useful guidelines for encouraging halal tourism in Oman. This is an exploratory study based on secondary sources like the available research and reports on halal tourism. A comparison between Oman, Qatar and Singapore is done based on ACES model of Mastercard Crescent-rating and the findings have been used to draw useful suggestions for improving halal tourism in Oman.

Keywords: ACES model; destination; Global Muslim Travel Index; GMTI; halal; Islam; muslim friendly travel; tourism; Shariah; Oman.

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1 Introduction

Islam is not just a religion; it is a complete way of life (Mustafar and Borhan, 2013). Thus, Islam touches upon all the aspects of human life including the consumption behaviour of Muslims (Alam et al., 2011). Eid and El-Gohary (2015) highlighted that Islamic values also significantly influence Muslim decisions with respect to consumption behaviour including halal tourism. *Halal tourism* is one of the most recent categories of tourism which is primarily oriented towards Muslim families who wish to abide by the principles of Islam even when they are travelling. It is about halal food, halal finance, prayer breaks, privacy for the family, etc., in addition to the routine tourism activities (Hasan, 2016). Halal tourism seeks to address Muslim traveller needs by incorporating the Shariah (Islamic law)-based components in accommodation, transportation, food and drinks, finance, tour packages and other tourism related activities (Chandra, 2014). It is a family friendly experience which takes care of the privacy and safety concerns of a family. It may sound to be focused towards Muslim tourists however, it is a concept which is more family oriented and it aims to take care of the unique needs of the family which is on a vacation.

The expenditure of the halal tourism sector was more than \$145 billion in 2014 (Crescentrating, 2015) which is expected to grow to \$233 billion by 2020 (Dinarstandard, 2012). Among the various sectors targeting Muslim consumers, the tourism industry has grown the fastest in response to the religious requirements of Muslim consumers. Indeed, Muslim travellers are the second largest market segment, following the Chinese (US\$168 billion) and ahead of Americans (US\$147 billion) (Eum, 2018). Muslim spending on travel is expected to reach US\$243 billion by 2021, representing a compound annual growth rate (CAGR) of 8.25% from 2015 (Thomson Reuters, 2017). The J. Walter Thompson Intelligence Report (2016), 'Future 100 trends and change to watch in 2017', points out that halal tourism has appeared as a main driver of future trends that will influence the market. A UK case study also approves that religious affiliation and religiosity impact the travelling behaviour of Muslims (Al Serhan and Alobaitha, 2013). Based on the above estimates and predictions, halal tourism market appears to be very lucrative and promising for all the players in the field of tourism marketing.

It is evident that halal tourism is a fast-growing tourism segment in the world today. According to Crescent-rating statistics, in 2014 Malaysia, Turkey and the UAE were among the top Muslim-friendly destinations for travellers and they continue to hold their positions in the top till date (Mastercard & Crescentrating GMTI, 2019). Not only the Muslim countries but even the non-Muslim countries like Singapore, Thailand, Australia, Taiwan, Korea, Japan, New Zealand, etc., are also gearing up to cater to this tourism segment due to its dynamic nature and relatively untapped emerging market for halal tourism products and services (Law, 2013).

2 Literature review

2.1 *Concept of halal tourism*

Muslim are supposed to be guided by the Quranic instructions and the sayings and deeds of the Prophet Muhammad (peace be upon him) (Zamni-Farahani and Henderson, 2010).

Based on the Islamic viewpoint of God, man and nature, travel and tourism are vital to humankind (Hasharina et al., 2006). While travelling as well, Muslims are supposed to observe the tenets of Islam. Basically, halal tourism means that a tourist may enjoy his or her tour without forgoing the obligatory religious duties like the five daily prayers or fasting during Ramadan which is the month of fasting.

The term 'Islamic' is applicable only to that which is linked directly to Islam and its values (Douglass and Shaikh, 2004) whereas, halal tourism is apparently free from any such religious intentions.

'Islamic tourism' refers to tourism motivated by religious spirituality, with the Islamic faith and beliefs being the primary purpose for travel. Islamic tourism includes Hajj and Umrah (Muslim Pilgrimage), as well as visiting religious sites and is viewed as a religious duty. In this case, both the consumers and service providers are expected to be Muslims with a deep understanding of Islam. Islamic tourism suppliers must comply strictly with the requirements of Islam, providing only proper materials and services for Muslims. In Islamic tourism, even the expenses are expected to be covered by Islamic finances.

In contrast to 'Islamic tourism' which draws upon the religious side of tourism, 'halal tourism' stresses the commercialised aspect of the tourism industry. The term 'halal' literally means 'permissible' in Arabic and refers to all products or practices and activities that are 'permissible' according to Islamic teachings (Eum, 2018). According to Battour and Ismail (2016), unlike Islamic tourism, halal tourism service providers and users are not limited to Muslims, nor is the location of the activity limited to the Muslim world. Therefore, halal tourism can refer to any service or goods that conforms with Islamic view and is thus permissible for Muslims and non-Muslims. Halal tourism may be viewed as a less strict form of Muslim tourism. While providers and users of halal tourism do not have to be Muslim, they do need to understand Islamic principles to provide appropriate services for customers.

Thus, halal tourism may seem to be focused on Muslim travellers but, it may be equally relevant to the people of other religions who are somewhat more conscious about their family, privacy and food habits. Halal tourism is not limited to Muslim travellers only, since the concept is 'family-oriented', the market may include the non-Muslims as well (Rehman and Jabooob, 2017). Although, halal tourism is any tourism activity which is permissible according to Islamic teachings but it is a family-oriented concept having appeal across religions.

2.2 Needs of Muslim tourists

There is a recently growing awareness among the Muslims to select halal options for their needs from the range of options currently being offered (Battour and Ismail, 2014; Muhammad, 1989). Many destinations such as Japan, the Philippines and Brazil are offering Muslim-friendly choices to Muslim travellers. Prayer rooms are allocated at major airports, and restaurants offer halal food in Japan. Muslim-friendly guide is also published to provide information on halal food and prayer places (The National, 2014).

Halal hotels and halal food halal hotels provide Muslim guests with services such as Qibla direction that should be faced while offering Muslim prayers, halal food options, alcohol-free beverages and prayer room with call for prayers (Battour et al., 2010). Japan is one of the non-Muslim countries which has taken initiatives towards training the hospitality staff by launching Muslim Friendly Project (2015). Travel guide in Kyoto city website is available in four languages catering mainly to the Muslim travellers: Arabic, English, Turkish and Malay. It guides them about Muslim-friendly hotels (Muslim Friendly Kyoto, 2015). The hotel also keeps the Holy Quran, a prayer mat and indicator for the prayer direction in its rooms meant for Muslim guests. Even the personal care products in such rooms have a halal certification. These services add value to the overall experience of the Muslim travellers staying in such hotels. This may churn out loyal customers in addition to a positive word of mouth publicity by the satisfied customers.

Muslim-friendly airport is one of the best practices to make the Muslim travellers feel comfortable. Kansai airport allocates three prayer rooms segregated by gender for Muslim travellers. There are water friendly toilets and washing space is provided for ablution before praying. Fifteen restaurants prepare Halal food promoted as 'pork-free and alcohol-free menus', and three restaurants are 'Halal certified' (KIX MFA, 2015).

These are the value-added facilities being offered by the airport which tend to enhance the experience of the travellers who are steadfast about offering their prayers even when they are in the transit.

Smartphone application based on the features built into a smartphone, smart apps are available to guide travellers to locate hotels, restaurants and other services suited to their choice. Thailand is one such country which has launched Muslim-friendly application to help tourism industry in Thailand (Lefevre, 2015). Mobile applications are playing a crucial role in promoting halal tourism as they help the travellers to locate restaurants that offer halal food, find halal accommodation services, destination guides and prayer rooms etc. (Battour, 2017).

2.3 *Leading players in halal tourism*

As evident from Tables 2 and 3, Malaysia, Indonesia, and Turkey are among the leading players in the halal tourism industry and as per the Global Muslim Travel Index (GMTI) 2019 ranks, they occupy the first, the second and the third rank respectively.

In Turkey, before 2002, there were only five halal hotels, which increased to 27 by the year 2008, providing a capacity of approximately 20,000 beds (Doğan, 2008). By the year 2014 the number of halal hotels had increased to 152 throughout Turkey (Tekin, 2014). In fact, there is no halal standard approved of and controlled by the Turkish Ministry of Culture and Tourism. Some hotel owners voluntarily do not serve alcohol and thereby state themselves as a 'family hotel'. The hotels following the halal tourism concept obey all the legal requirements of the ministry directives but use hotel facilities as per halal tourism needs. For example, these hotels do not sell alcoholic beverages in the bars and use the dance club and night clubs for prayer purpose. Additionally, in these hotels separate pool and beach facilities is provided for men and women, dress codes apply in certain areas, children (six years and above) of opposite gender are not allowed in swimming facilities, no photography in swimming facilities. (Turizmhaberleri, 2011). Thus, halal tourism flourishes primarily because of the voluntary choice of the hotel operators and non-interference by the government.

The reason behind Malaysia's success story on Muslim friendly and halal tourism is the involvement of its Tourism Ministry as early as 2009 to identify the Muslim market as a priority market which led to the formation of the Islamic Tourism Centre in the same year. Malaysia's success story in halal tourism is all about government led commitment to stimulate the whole industry to make Muslim friendly tourism a priority market with all services geared to cater to this segment (COMCEC, 2016). Other key strengths include its large Muslim population base, a strong halal certification body, and diverse natural and man-made tourism resources (Som et al., 2016). On the other hand, Malaysia has been making conscious efforts to brand itself as an Islamic and halal hub in the recent years. It has formed rules on unacceptable tourist behaviours which are forbidden by Islam (Henderson, 2003).

Halal tourism in Indonesia is an activity that is supported by a wide range of facilities and services provided by communities, businesses, governments, and local governments that comply with Sharia (The Ministry of Tourism Republic Indonesia, 2012). In 2014, the Ministry of Tourism in collaboration with the Indonesian Ulama Council (MUI) set up guidelines to determine the halal standards for tourism products. The theme of halal tourism in Indonesia emphasises the principles of Shariah in tourism management and service which is polite and friendly to all tourists and the nearby environment (Jaelani, 2017). There seems to be an emphasis on developing a universal appeal of halal tourism for people of all the faiths.

Thus, in the cases of Malaysia and Indonesia in addition to the players in tourism industry, a major role is played by the government in consultation with the council of Islamic scholars in bringing out useful legislations and guidelines to boost halal tourism in their respective countries. In contrast, the government in Turkey appears to be non-interfering to the cause of halal tourism. The operators in Turkey are free to offer halal tourism services on a voluntary basis (Rehman and Ahmeruddin, 2018).

2.4 Mastercard Crescent-rating GMTI

Crescent-rating has studied the halal tourism market and has benchmarked destinations with the annual Mastercard Crescent-rating GMTI since 2011. The GMTI adopts the most recent set of measurements to better point out the level of Muslim-friendly travel of each destination. The ratings are based on Crescent-rating ACES model which considers the factors like access, communication environment and services which are relevant to halal tourism.

Based on the data available in the GMTI from 2015–2018, Table 2 is compiled which shows a comparison between the OIC and non-OIC destinations for halal travel from 2015–2018. Table 2 clearly highlights the top positions for Malaysia, UAE, Indonesia and Turkey among the OIC nations whereas, Singapore, Thailand and the UK are the top choices among the non-OIC countries. OIC destinations have a distinct advantage on the index due to the readily available Muslim-friendly facilities and services. However non-OIC destinations are trying hard to move up the index rankings well by improving their services to better attract the Muslim travel market. This is also evident from Table 3 given. Despite being a non-Islamic country, Singapore has occupied rank 6 (Mastercard & Crescentrating GMTI, 2018) and rank 10 (Mastercard & Crescentrating GMTI, 2019) worldwide as a preferred destination for Muslim tourists.

Table 1 Crescent-rating ACES model

| <i>Access</i> | <i>Services</i> |
|---|---|
| <i>Is it easy to obtain VISA to the destination?</i> | <i>Is there a range of dining options with halal guarantee?</i> |
| Are there several ways to travel to the destination? | Is it easy to offer prayers? |
| Are the transport facilities sufficient for the long run? | Are airport facilities Muslim friendly? |
| | Does destination provide unique experience for visitors? |
| <i>Communication</i> | <i>Environment</i> |
| Is there adequate awareness and outreach of Muslim travel needs? | Is climate safe and relatable for Muslim travellers? |
| Is it easy to connect between point of origin and destination? | Does the destination draw significant Muslim markets? |
| Is the destination visible in new digital platforms like social networking sites? | Does destination have developed levels of institutions, research, education and technology? |

Source: Mastercard & Crescentrating GMTI (2018)

It goes to the credit of Singapore that it has surpassed three countries namely Bahrain, Oman and Morocco to share the sixth rank with Qatar. It is a clear indication that the non-OIC nations like Singapore, Thailand, the UK to name a few are finding the Muslim travellers' market very lucrative and they are gearing up to take advantage of the opportunity brought forward by the novel idea of halal tourism. They are trying to modify their infrastructure, facilities and services to suit the special needs of Muslim travellers.

2.5 *Halal tourism in Oman*

As per the vision statement of Ministry of Tourism, Oman wishes to become a top of the mind tourist place by the year 2040. Undoubtedly, Oman has all the ingredients of a leading tourist destination. It has some of the most beautiful mosques, awe inspiring nature and wild life. Oman has some of the most stunning beaches covering over 3,165 kilometres coastline offering a variety of water sports activities (Omantourism, 2018).

Deserts and Bedouin life in Oman are also a puller for the tourists. Oman has a lot to offer to the adventure seeking travellers in the form of mountaineering, trekking, desert expeditions, etc. It has a well-preserved cultural heritage and has a lot of colours in the form of its music and dance, handicrafts, Omani food, etc.

Although, there is no deliberate effort by the ministry to position Oman as a destination for halal tourism, still it has emerged as one of the top 10 destinations for halal tourism. As per Table 2, Oman enjoyed a GMTI rank 7 among OIC nations in the years 2015 and 2016 and later went marginally down to rank 8 in the years 2017 and 2018 (Mastercard & Crescentrating GMTI, 2015, 2016, 2017, 2018). Table 3 shows a worldwide rank of 9 for Oman in 2018. Thus, Oman is naturally endowed to be one of the most sought-after destinations for halal tourism.

Table 2 The top 10 OIC* versus non-OIC destinations of GMTI from 2015 to 2018

| Rank | 2015 | | 2016 | | 2017 | | 2018 | |
|------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | OIC | Non-OIC | OIC | Non-OIC | OIC | Non-OIC | OIC | Non-OIC |
| 1 | Malaysia | Singapore | Malaysia | Singapore | Malaysia | Singapore | Malaysia | Singapore |
| 2 | Turkey | Thailand | UAE | Thailand | UAE | Thailand | Indonesia | Thailand |
| 3 | UAE | UK | Turkey | UK | Indonesia | UK | UAE | UK |
| 4 | Saudi Arabia | South Africa | Indonesia | South Africa | Turkey | South Africa | Turkey | Japan |
| 5 | Qatar | France | Qatar | Hong Kong | Saudi Arabia | Hong Kong | Saudi Arabia | Taiwan |
| 6 | Indonesia | Belgium | Saudi Arabia | France | Qatar | Japan | Qatar | Hong Kong |
| 7 | Oman | Hong Kong | Oman | Taiwan | Morocco | Taiwan | Bahrain | South Africa |
| 8 | Jordan | USA | Morocco | NA | Oman | France | Oman | Germany |
| 9 | Morocco | Spain | Jordan | Japan | Bahrain | Spain | Morocco | France |
| 10 | Brunei | Taiwan | Bahrain | Sri Lanka | Iran | USA | Kuwait | Australia |

Source: Researcher

Table 3 The top 10 destination of GMTI 2018 and 2019

| <i>GMTI 2018</i> | | | <i>GMTI 2019</i> | | |
|------------------|----------------|--------------|------------------|----------------------|--------------|
| <i>Rank</i> | <i>Country</i> | <i>Score</i> | <i>Rank</i> | <i>Country</i> | <i>Score</i> |
| 1 | Malaysia | 80.6 | 1 | Malaysia | 78 |
| 2 | Indonesia | 72.8 | 2 | Indonesia | 78 |
| 2 | UAE | 72.8 | 2 | Turkey | 75 |
| 4 | Turkey | 69.1 | 4 | Saudi Arabia | 72 |
| 5 | Saudi Arabia | 68.7 | 5 | UAE | 71 |
| 6 | Qatar | 66.2 | 6 | Qatar | 68 |
| 6 | Singapore | 66.2 | 7 | Morocco | 67 |
| 8 | Bahrain | 65.9 | 8 | Bahrain | 66 |
| 9 | Oman | 65.1 | 8 | Oman | 66 |
| 10 | Morocco | 61.7 | 10 | Brunei and Singapore | 65 |

Source: Mastercard & Crescentrating GMTI (2018, 2019)

3 Methodology

From the GMTI rankings (refer to Table 2) it appears that Oman is on its way out from the top 10 destinations for halal tourism. Another important observation is that the non-OIC nations like Singapore, Thailand, the UK, Japan, Australia, etc., are making their way into the top destinations for halal tourism. Oman despite having all the ingredients of making a top destination for halal tourism is found lagging behind. It thus becomes mandatory to look deeper into these rankings to find a solution to the problem of halal tourism in Oman.

This study is an exploratory study therefore, it is based on secondary sources like available research papers and reports on halal tourism.

Based on convenience, Qatar an OIC nation and Singapore a non-OIC nation both having rank 6 in 2018 (GMTI, score 66.2) worldwide as destinations for halal tourism are chosen for a comparative study with Oman (rank 9, GMTI score 65.1). Even as per the GMTI of 2019 Qatar, Oman and Singapore are having close scores of 68, 66 and 65 respectively. Other than convenience, the reason for choosing Qatar for a comparative analysis with Oman is that both these countries have been categorised as the OIC nations best positioned for growth (Crescentrating, 2015). The basic objective is to compare these two countries with Oman and look for the best practices being followed by them in the field of halal tourism. The study delves deeper into the ACES framework and tries to look beyond the rankings arrived at by the GMTI.

4 Findings and analysis

Based on the ACES frame work an analysis is made for the years 2017, 2018 and 2019 which looks at the rank wise movement of countries in the top 10 of halal tourism with respect to each of the factors given in the ACES. A brief factor wise analysis of the Table 4a with special reference to Oman, Qatar and Singapore is presented below:

- 1 *Access* refers to the ease access of destinations and is dependent on the scores of air connectivity and visa free travel. Transport infrastructure is another metric added in 2018. Oman ranked 6th in the year 2017 and in the rankings of 2018 and 2019 it is not in the top 10 destinations. Oman has good air connectivity and relaxed visa requirements (refer to Table 5). But it lacks in adequate public transport infrastructure. The only other mode of transport available is road transport mainly by cars and buses which is not only expensive but also time consuming. Compared to Oman, Qatar had the rank 4 in 2017 and it did not figure in the top 10 in 2018. However, Qatar has made the most brilliant comeback by occupying the rank 1 in 2019. This may be attributed to the preparations being made by the Qatar government for hosting the forthcoming FIFA club football world cup in December, 2020. Singapore however has gone up to rank 3 in 2018 from the rank 5 in 2017. It is surprising to note that Singapore does not make it to the top 10 ranks in 2019 despite having a world class international airport, Singapore has a well-developed system for public transport which includes buses, trams and railways. The entry of Switzerland to rank 3 in 2019 is an element of surprise.

- 2 *Communication and outreach* refer to a destination with an excellent ease of communication level as well as a good awareness on Muslim travel needs and outreach towards Muslim travellers. Digital presence is added in 2018 for the calculation of ranks. Oman ranked seventh (7th) in the year 2017 and in the years 2018 and 2019 it is not in the top 10 destinations. Oman is relatively well placed in terms of ease of communication. However, it is lagging behind others in digital presence and customer outreach (refer to Table 4a). Qatar ranked 6th in the year 2017 and surprisingly in 2018 and 2019 it is also not in the top 10 destinations. From rank 4 in 2017, Singapore has gone up to rank 3 in 2018 which it has been to maintain in the year 2019. This may be due to the reason that Singapore is technologically very advanced and it has been able to harness this strength in order to communicate with the target market by creating its digital presence worldwide. Table 4b with special reference to Oman is presented below.

- 3 *Environment* refers to the overall family-friendliness of the destination; number of Muslim visitor arrivals, safety and culture determines a good travel environment for Muslim travellers. Oman ranked ninth in the year 2017 and in 2018 it is not in the top 10 destinations. This is a surprising result and it may be attributed to a low score for visitor arrival (refer to Table 5). However, in the year 2019 Oman has made a comeback by reoccupying rank 9. Qatar ranked tenth in the year 2017 and in 2018 it is not in the top 10 destinations. Qatar has bagged rank 10 in the year 2019. Singapore however has gone up to rank 1 in 2018 from rank 4 in 2017 which it continues to maintain in 2019.

In doing this Singapore has surpassed the top 3 rankers in 2017 which includes Malaysia, UAE and Turkey. This is indeed a major achievement and a remarkable feat for Singapore. The revival of Oman and Qatar also is a positive indication for both the countries.

Table 4 The top 10 destination and factors of halal tourism

| <i>(a)</i> | | | | | | |
|-------------|---------------|-------------|-------------|-----------------------|-------------|--------------|
| <i>Rank</i> | <i>Access</i> | | | <i>Communications</i> | | |
| | <i>2017</i> | <i>2018</i> | <i>2019</i> | <i>2017</i> | <i>2018</i> | <i>2019</i> |
| 1 | Turkey | Turkey | Qatar | Malaysia | Malaysia | Indonesia |
| 2 | Malaysia | Malaysia | UAE | Indonesia | Indonesia | Malaysia |
| 3 | UAE | Singapore | Switzerland | UAE | Singapore | Singapore |
| 4 | Qatar | UAE | Malaysia | Singapore | Thailand | Japan |
| 5 | Singapore | Hong Kong | Hong Kong | Bahrain | Japan | New Zealand |
| 6 | Oman | Germany | Turkey | Qatar | UAE | Turkey |
| 7 | Indonesia | Netherlands | Netherlands | Oman | New Zealand | Brunei |
| 8 | Morocco | France | Germany | Morocco | Brunei | South Africa |
| 9 | Saudi Arabia | UK | UK | Saudi Arabia | Bahrain | Taiwan |
| 10 | Bahrain | South Korea | France | Turkey | Australia | Saudi Arabia |

| <i>(b)</i> | | | | | | |
|-------------|--------------------|--------------|--------------|-----------------|--------------|--------------|
| <i>Rank</i> | <i>Environment</i> | | | <i>Services</i> | | |
| | <i>2017</i> | <i>2018</i> | <i>2019</i> | <i>2017</i> | <i>2018</i> | <i>2019</i> |
| 1 | Malaysia | Singapore | Singapore | Malaysia | Malaysia | Indonesia |
| 2 | Turkey | UAE | Turkey | Saudi Arabia | Indonesia | Saudi Arabia |
| 3 | UAE | Turkey | UAE | UAE | Saudi Arabia | Malaysia |
| 4 | Singapore | Malaysia | Saudi Arabia | Qatar | UAE | Turkey |
| 5 | Morocco | Hong Kong | Malaysia | Indonesia | Egypt | Iran |
| 6 | Bahrain | Saudi Arabia | Bahrain | Oman | Turkey | UAE |
| 7 | Saudi Arabia | Kazakhstan | South Korea | Bahrain | Qatar | Qatar |
| 8 | Indonesia | Spain | Japan | Turkey | Oman | Egypt |
| 9 | Oman | Japan | Oman | Morocco | Bahrain | Brunei |
| 10 | Qatar | Bahrain | Qatar | Singapore | Iran | Morocco |

Source: Researcher

- 4 *Enabling services* refer to the level of Muslim-friendly services that each destination offers is based on the destination's halal dining options, prayer spaces, airport facilities and accommodation options. Unique experiences metric is added in 2018. In 2018 Oman slipped down to the rank eight from the sixth rank in 2017. In 2019 Oman fails to register itself among the top 10 in terms of enabling services which is a serious issue and needs to be looked into urgently. Oman needs to consolidate itself on this parameter at least because this is where Oman scores high over its competitors. With a below 50 score of 47 against accommodation options (refer to Table 5), Oman needs to offer more accommodation choice ranging from dormitories to luxury hotels at affordable rates to its tourists. Qatar has gone down to rank 7 in 2018 from rank 4 in 2017, however it has been able to maintain it in 2019. Singapore ranked tenth in the year 2017 which it could not maintain in the years 2018 and 2019.

Table 5 Metric wise scores of GMTI 2017–2018

| S. no. | Parameters | Oman | | | Qatar | | | Singapore | | |
|--------|--------------------------------|------|------|------|-------|------|------|-----------|------|------|
| | | 2017 | 2018 | 2019 | 2017 | 2018 | 2019 | 2017 | 2018 | 2019 |
| 1 | Enabling climate | 41.2 | 56 | 55 | 42.6 | 62 | 61 | 53.4 | 98 | 98 |
| 2 | Safety and culture | 94 | 94 | 97 | 90 | 96 | 100 | 100 | 100 | 97 |
| 3 | Muslim visitor arrival | 12.6 | 29 | - | 14.3 | 17 | - | 25.6 | 36 | - |
| 4 | Dining options | 80 | 80 | 80 | 90 | 90 | 90 | 80 | 85 | 85 |
| 5 | Ease of access to prayer space | 100 | 100 | 100 | 100 | 100 | 100 | 70 | 70 | 70 |
| 6 | Airport facilities | 100 | 100 | 100 | 100 | 100 | 100 | 66.7 | 67 | 67 |
| 7 | Unique experiences | - | 10 | 13 | - | 10 | 12 | - | 10 | 12 |
| 8 | Accommodation options | 47.7 | 47 | 47 | 53.9 | 55 | 53 | 42.7 | 39 | 35 |
| 9 | Ease of communication | 66.5 | 64 | 61 | 73 | 66 | 62 | 78.2 | 78 | 75 |
| 10 | Digital presence | - | 24 | 35 | - | 21 | 37 | - | 49 | 60 |
| 11 | Outreach | 31.3 | 31 | 38 | 26.3 | 26 | 26 | 51.3 | 51 | 39 |
| 12 | Air connectivity | 78.4 | 75 | 60 | 93.4 | 59 | 50 | 71.1 | 64 | 32 |
| 13 | Visa requirements | 63.9 | 69 | 61 | 67.4 | 67 | 92 | 77.5 | 71 | 76 |
| 14 | Transport infrastructure | - | 36 | 84 | - | 57 | 85 | - | 85 | 99 |

Source: Researcher

Table 5 clearly indicates that Oman has safety and culture, airport facilities, ease of access to offer prayers, dining options, air connectivity, visa requirements and ease of communication as its major advantages in terms of being a halal tourism destination. However, it is found lacking in terms of enabling climate, visitor arrival, digital presence, customer outreach, unique experiences, accommodation options and availability of public transport.

In 8 out of 14 parameters, Singapore is clearly ahead of the other two countries. These are some of the most relevant ones including communication, digital presence and outreach which may be because Singapore is a hub for information technology. Singapore leaves Qatar and Oman far behind in terms of transport infrastructure, Visa requirements and Muslim visitor arrival. What is more surprising is that Singapore has a score of 100 and 98 for safety and culture and enabling climate respectively. Qatar leads only in case of dining options and accommodation options where Singapore is not far behind. Oman has a lead only in case of air connectivity. Oman and Qatar score over Singapore in case of airport facilities and ease of access to prayer space. Surprisingly all the three nations have a low score of 10 in case of unique experiences in 2018 which has marginally improved in 2019. This clearly hints that all these countries urgently need to create a unique touristic experience for the tourists visiting them and also for the potential tourists.

5 Discussion

Singapore is one of the most successful destinations which has been able to cater to the needs of both Muslim and non-Muslim travellers. The Mastercard & Crescentrating GMTI (2015) report ranked Singapore as the no. 1 Muslim friendly destination among the non-OIC countries. With Muslim arrivals constituting around 20% of the total arrivals in 2014, it is a good example of how a destination successfully copes with the needs of both Muslim and non-Muslim visitors. The key strength of Singapore also lies with its local Muslim population. With around 15% of the population being Muslim, Singapore has been able to develop a strong halal food and Muslim friendly services environment. Singapore has one of the strongest halal certification bodies among the non-OIC countries. Singapore tourism board was a pioneer to publish the Muslim visitor guide in the year 2010. There are sufficient prayer facilities with a growing number of water friendly toilets. Some hotels cater to the fasting needs of Muslims during the month of fasting. With the growing awareness about Muslim travel needs, Changi airport is becoming more receptive to the needs of the Muslim tourists. Singapore airlines provides halal food and the catering service provider at the Changi airport has a separate halal kitchen.

Thus, Singapore is a preferred travel destination by Muslims on account of the following:

- 1 family friendliness and safety
- 2 high Muslim-friendly services and facilities available
- 3 good halal awareness and reach to muslims (COMCEC, 2016).

It is evident that Singapore's recognition among the top 10 destinations for halal tourism in the world is the result of sustained efforts by all the players involved including the Singapore tourism board which has facilitated the development of halal tourism in Singapore.

Qatar's is another destination, which has the potential to grow in the Muslim friendly travel (MFT) market. Qatar Tourism Authority has made efforts to develop Qatar tourism with a balance of preserving its cultural heritage as well as building modern attractions. Thus, Qatar has positioned itself as a destination offering heritage and modernity. Qatar has also the basic MFT services such as availability of halal food, prayer facilities, etc. A large majority of hotels offer prayer facilities – such as designated prayer rooms, prayer mats and timetables and Qibla (direction for prayers) signs marked in rooms for the Muslim guests. Qatar needs to explore avenues on how best to provide a uniquely different and Qatari experience to the traveller. There are some attempts to raise the profile of country's tourism sector such as promoting and funding programs including sports, education, authentic Qatari and Arab cultural experiences. However, deliberate marketing campaigns or strategies targeted at Muslim travellers is not evident (COMCEC, 2016).

As far as Oman is concerned, it has all what it takes to make a success story in halal tourism. However, there is a lack of general awareness among people about halal tourism in Oman. Relevant and user-friendly information about halal tourism in Oman is not widely available. Surprisingly, it is found missing on the website of the ministry of tourism, Oman. A lot of information on the Oman tourism website is available in Arabic only. This is a serious lapse and needs to be corrected at the earliest.

Lack of initiative by the concerned authorities in projecting Oman as a destination for halal tourism. Oman has a low digital presence and not many tourists around the world are much aware of Oman as a tourist destination. There are no unique experiences in Oman which may be considered different from what other Arab nations have to offer. Accommodation options is yet another area which needs improvement on an urgent basis.

Omani culture is Islamic and conservative, which may not be very comfortable for some of the non-Muslim tourists. This is in favour of halal tourism however; it is a major put off for many tourists coming from liberal western countries (Rehman, 2019).

6 Guidelines for halal tourism in Oman

Oman is found lacking a unique selling proposition (USP) for its tourism. It needs to implicitly differentiate its tourism from that of its rivals and come up with a strong brand positioning for itself. 'Beauty has an address' the current punch line of Oman tourism needs to be replaced with something more tangible like 'family-friendly' tourism. Taking clue from countries like Malaysia, Indonesia and even Singapore, the concerned authorities along with other players in the field of tourism need to seriously and deliberately position Oman as a unique destination for halal tourism.

Accommodation options is yet another area which needs improvement on an urgent basis. Introduction of more choice of accommodation catering to unique requirements of the inbound tourists is needed. Although the transportation ratings in 2019 have moved up for Oman which is perhaps due to the recent introduction of government managed bus

transport in addition to the private bus services. Still there is a need to introduce more buses in the fleet and to launch a more robust taxi service on the lines of the UAE.

The lack of digital presence and a low customer outreach needs to be tackled almost on an urgent basis by actively participating in the relevant fora like travel blogs, trade exhibitions, conferences, digital marketing, etc. There is a need to actively engage the stake holders on the social media to create awareness about halal tourism in Oman. The Ministry of Oman tourism, Oman airlines and other players including the hotels and travel agents needs to upgrade and integrate their websites to make them more interactive and user friendly.

A full section on halal tourism needs to be added with multiple language options to the website of Oman tourism with suitable links to hotels, travel agents, restaurants, etc.

In fact, there is an urgent need to make the masses aware about halal tourism and its benefits for tourism sector in Oman. Once people come to know that it is not akin to pilgrimage or Islamic tourism, it will have a universal appeal for all the tourists irrespective of their faith. Halal tourism is about family, privacy, good wholesome food and drinks and a unique idea of fun. There is a strong need to create some unique experiences and something truly Omani about halal tourism in Oman which is inimitable by the others in the fray.

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