



Article

Sustainable, Smart and Muslim-Friendly Tourist Destinations

Pedro Cuesta-Valiño *D, Fadoua Bolifa *D and Estela Núñez-Barriopedro

Department of Economics and Business Management, University of Alcalá, 28802 Alcalá de Henares, Spain; estela.nunezb@uah.es

* Correspondence: pedro.cuesta@uah.es (P.C.-V.); fadoua.bolifa@edu.uah.es (F.B.)

Received: 29 January 2020; Accepted: 22 February 2020; Published: 27 February 2020



Abstract: Information and Communication Technology (ICT) tools are perfect for developing tourism. Several countries are making an effort to become smart and sustainable tourist destinations, making it easier for tourists to interact with their environment while at the same time improving the quality of life for local people. There are many studies of this process and the benefits it brings, although most of them approach the subject from a western traveler's point of view. This article aims to study the benefits of being a smart and Muslim-friendly tourist destination. An exploratory study was therefore carried out, including a bibliographical review of over one hundred secondary sources. We analyze the Muslim-friendly online services provided by nine destinations, and one of our principal conclusions is that these online services are of the greatest importance for a destination to be truly Muslim-friendly. We also conclude that such services allow companies to design tailored proposals and promote them through digital channels aimed at Muslim people.

Keywords: smart tourism; IT applications; Muslim-friendly; halal tourism; sustainability; tourist destination

1. Introduction

The expansion of the Internet is accelerating the use of information technologies, intelligence and innovation. In fact, the rate of expansion is such that it is reconfiguring all sectors of the economy [1,2]. The tourism sector must also respond to this challenge and aim to provide a tailored offering [3–5].

Nowadays, tourists are ever more connected, informed and demanding, since they can access highly detailed information [6]. Before they buy, they can compare alternatives on websites or mobile apps. To summarize, it can be said that we have a new generation of tourists who oblige destinations to evolve in this same direction in order to meet their needs and expectations [7].

Until the last two decades, the tourism industry was viewed from a western perspective [8]. This perspective has taken little account of other peoples and cultures [8–10]. Little has been done thus far to meet the needs of other groups who come from different cultures and ways of life, but if smarter, more sustainable tourism is to be offered, these needs must be taken into account [11–14]. In fact, people all over the world are travelling more than ever. Specifically, 1,400 million people travelled to another country for tourism purposes in 2017 [15]. Despite this, there is still a major challenge for managers in the tourism industry: to learn about the tourist's home culture [10,16] in order to offer them goods and services that will make them feel at home [17,18].

Then again, it should be pointed out that a quarter of the world's population is Muslim, and their religion governs their way of life [19,20]. These people evidently constitute a significant market share for the tourism industry [21,22].

The Muslim-friendly tourist destinations literature gap was examined to answer the following questions: what Muslim-friendly services must a destination offer for it to be considered a

Sustainability **2020**, 12, 1778 2 of 13

Muslim-friendly destination? What are currently the smartest and most sustainable Muslim-friendly destinations? Are these destinations Muslim-friendly, smart and sustainable over time?

Consequently, one of the principal objectives of this work is to analyze how destinations are ever smarter and more sustainable through offering Muslim-friendly tourism, which requires them to study and adapt tourism services to the religious requirements of the Muslim market segment] [23–25]. Another aim is to study the Muslim-friendly digital offering of the best of the top 20 sustainable smart tourist destinations in the Muslim-friendly ranking for 2017–2018.

This study considers sustainable smart and Muslim-friendly tourist destinations as a new contribution to the literature. The following research provides a conceptual framework, which is applied to the top sustainable smart tourist destinations. This may be applied to other tourism destinations that wish to become more digitally oriented and offer sustainable smart tourist services aimed at the Muslim market segment.

2. Theory

The following section provides a conceptual framework for sustainable smart and Muslim-friendly tourist destinations, which is therefore structured as follows. Firstly, we explain what we mean by smart, sustainable tourist destinations. Secondly, the culture, religion and segmentation variables are studied. Thirdly, the characteristics of the Muslim market segment are analyzed. Finally, the criteria for considering that a destination is Muslim-friendly are examined.

2.1. Sustainable, smart, tourism destinations

Information and Communication Technologies (ICTs) have revolutionized the hospitality and tourism industries [26]. As a result of the use of ICT, tourists are increasingly aware of the characteristics of the tourism offering and seek greater customization [27–30] (in addition, they are acquiring greater power through the use of technologies to co-create value with other stakeholders of that destination [31]).

Destinations are therefore working to become intelligent and sustainable tourist destinations by making good use of technologies to inform tourists about the destination, and specifically the services available, thus improving the traveler's experience, benefitting the tourism industry, and improving the quality of life for local residents [6,32–35].

Today, there are intelligent guides that provide comprehensive tourist information on travel-related services such as where to eat, transportation, hotel reservations and travel guides to the destinations [36,37].

People who are more accustomed to using their phones at home have more interest in doing so while traveling, and are more likely to do so [38,39]. This helps them save time [40], and therefore influences both their satisfaction and the relationship between mobility and satisfaction [41]. Tourists use mobile devices to plan, buy and improve their travel experiences [42,43]. There has been a growth in the use of mobile applications in the industry. This is a significant support for smart tourist destinations, making travel more functional and practical [44]. One of the potential uses of mobile information services is to support the search for tourist information on the site [45].

Applications are useful for tourists, but they are also of great importance for destinations. In fact, Big Data resulting from user-generated content and real-time analysis and synchronization of this data have become the main drivers of the value-creation process for an intelligent destination [44,46]. On the one hand, they make it possible for tourism profiles to be defined in more detail, both their sociodemographic profiles and their preferences, feelings and attitudes. These data are very useful for creating tourist services that better meet the needs of tourists [47]. This may allow companies to offer personalized experiences in the hotel industry, and it has become of the highest importance for companies that want to attract consumers in a more personalized way [48–50].

2.2. Culture and Religion and Segmentation Variables

Although the world seems ever more interconnected by the technological revolution, cultural differences persist. Some aspects of consumer habits seem to be deeply rooted in culture, and are

Sustainability **2020**, *12*, 1778 3 of 13

thus resistant to change [51–53]. The traditional segmentation criteria, which involve geographic, sociodemographic, psychographic and behavioral components, need to be revised and new criteria introduced [54]. Although religion and culture are market segmentation variables [55–57], in general it seems that a specific app is required, within the world of tourism marketing, that is more in line with religion. To summarize, people travel with all their cultural-religious baggage, and cannot discard it when holidaying in destinations that are culturally different [58]. In the case of Muslims, religion is not a question of certain isolated religious practices; rather it is a way of life that affects several aspects of their lives [59–64]. The term halal refers to products and services that are suitable for Muslims [65], and *Muslim-friendly* refers to those companies and institutions which offer some services that are suitable for Muslims [66,67]. Muslims are very unlikely to go on a holiday that involves leaving their comfort zones to visit other areas where their sensibilities are not taken into consideration [68]. The Muslim-friendly tourism option may be an incentive, an approach and an attraction for Muslims who want to discover other places where they can have fun without contravening their religious and cultural principles [22,23,69].

2.3. Characteristics of the Muslim Market Segment

It should be pointed out that 24% of the world's population is Muslim [70]. This equates to around 1.7 billion people for whom their religion governs their way of life [19,20]. These people evidently constitute a significant market share for many industries [57], including tourism [16,17].

The Muslim travel market shows continuous growth in terms of both the amount spent and the number of Muslim arrivals worldwide. The Muslim segment is very loyal to those products and services that are tailored to meet their religious requirements [71–73].

The Muslim population is younger than the global average [70]. There are about one billion young people who are better educated and demand products and services that respect their religious beliefs [70,74].

Young Muslims can be considered to be one of the key motors for growth in Muslim travel, since young Muslim tourists, when compared with older Muslims, have higher incomes and are prepared to spend them, are hyper-connected, seek out information on halal products, brands and trips, are influenced by opinions on digital media, like to share their own opinions, and leave comments on social networks about halal products and services [75,76].

Like other young people, they are very attached to new technologies [77–79], use their smartphones for multiple purposes and use them throughout the various stages of their trip [31,41,80,81]. They download apps, such as apps that provide prayer times, especially in non-Muslim countries where there are no muezzins making the call to prayer over loudspeakers on mosques; apps that indicate the direction of Mecca so that the traveler can pray facing the right direction [82] (Fakhruroji 2018); and apps that geo-locate restaurants and places of worship. All these apps make life easier for Muslim travelers. These platforms are enriched by user comments [83].

The use of IT applications is affected by the users' culture [84], and in tourism, that variable also affects users' confidence in websites [85,86]. In the case of Muslims, they usually consult religious apps as part of everyday life, to learn or practice their religion, or to read verses of the Quran [87,88]. Many Muslims also search for websites and apps for geo-locating Muslim-friendly places and thus check whether their stay at a particular destination will make it easier or harder to practice their religion [89].

2.4. Criteria for evaluating destinations as Muslim-Friendly

There are many studies that demonstrate the importance of the availability of halal food for Muslims when it comes to choosing their tourism destinations [21,90–93]. Several countries are therefore working to satisfy that requirement by promoting and disseminating their Muslim-friendly offerings through online channels aimed at the Muslim market segment, such as websites and applications,

Sustainability **2020**, *12*, 1778 4 of 13

in order to ensure that their messages reach Muslim tourists [94]. They thus assist Muslim tourists and consumers in making decisions, and also ensure that their visit is more satisfactory [89].

A Muslim-friendly destination is one that is aware of the needs of the Muslim market segment and its religious sensibilities and provides appropriate products and services [24,95].

The institution that studies this tourism is Mastercard-CrescentRating, which is the most significant authority on Muslim-friendly halal tourism. CrescentRating has been studying tourist destinations since 2011, and since its association with Mastercard they have been producing the Global Muslim Travel Index (GMTI), which ranks 130 destinations. Of these, 48 destinations are in countries belonging to the Organization of Islamic Cooperation (OIC) and 82 are in non-OIC countries. The aim is to evaluate these tourist destinations and rank them from more to less Muslim-friendly based on various criteria and factors, which they adapt according to the needs of the market and the latest trends. To this end, it uses the ACES (Access, Communications, Environment and Services) criteria created by CrescentRating, which provide a guided framework to enable destinations to better understand the key aspects of halal travel. The four key factors, which are evaluated using quantitative data, are:

- (1) Ease of access to the destination
- (2) Internal and external communication by the destination
- (3) Environment at the destination
- (4) Services provided by the destination

The Global Muslim Travel Index (GMTI) is now the main reference source for the industry. It provides in-depth market insights to help all stakeholders benefit from the growth of the Muslim market segment [96]. The GMTI makes it possible for destinations and hospitality services to connect effectively with Muslims. Since this annual index was created, its criteria and sub-criteria have evolved in keeping with the development of the Muslim travel market.

In 2018, four new sub-criteria were added to the ACES criteria to take account of the destination's levels of innovation and sustainability.

3. Material and Methods

In order to answer to the questions and achieve the aims of this research, an exploratory study has been carried out including a review of the principal literature in the field of Muslim-friendly tourism destinations.

Specifically, over a hundred studies have been reviewed in order to identify the state of the art and develop the framework.

The following academic databases were used for the literature search: Dialnet, EBSCO, Host, Google Scholar, Scopus, ProQuest and Web of Science (WOS). Key words included terms such as smart tourism; IT applications; Muslim-friendly; halal tourism; sustainability; tourist destination; Muslim market segmentation; and Global Muslim Travel Index (GMTI). Additionally, reports and websites were reviewed.

To assess the importance of ICT-based services aimed at the Muslim market segment when considering a friendly destination for Muslims, this work studies the extent to which these digital approaches to the Muslim segment affect the position of a country in the 2018 GMTI index ranking when compared to the 2017 GMTI index. One important difference between these indices is that innovation criteria were included in the 2018 GMTI index (see Table 1).

For this study, nine countries were selected for which the Muslim population does not exceed 6.5% in order to ensure that the services studied had been created to attract Muslim tourists rather than designed for the local population. The following criteria were also applied:

- Countries that have maintained their positions at the top of the ranking
- Countries that have decreased or increased considerably in the ranking

The offer of Muslim-friendly technology provided by each of these nine selected destinations is investigated, listing the most relevant web pages and mobile applications that target the Muslim

Sustainability **2020**, 12, 1778 5 of 13

market segment, the agency that created them and the functions that provided and edit a table with all the information collected (see Table 2).

4. Results

The countries that provide more Muslim-friendly digital services have kept their high positions in the rankings or have gone up by several positions (see Table 1).

Table 1. Comparison of 2018 Top 20 Non-Organization of Islamic Cooperation (OIC) destinations with corresponding performance in 2017.

Rank	Top 20 Non OIC 2018	Score	Rank	Top 20 Non OIC 2017	Score
6	Singapore	66.2	10	Singapore	67.3
16	Thailand	56.1	18	Thailand	61.8
22	United Kingdom	53.8	20	United Kingdom	60
25	Japan	51.4	30	South Africa	53.6
27	Taiwan	49.6	31	Hong Kong	53.2
27	Hong Kong	49.6	32	Japan	52.8
32	South Africa	47.7	33	Taiwan	52.4
35	Germany	45.7	34	France	52.
36	France	45.2	36	Spain	48.8
37	Australia	44.7	37	United States	48.6
38	Switzerland	44.0	39	Germany	48.2
39	Spain	43.5	40	India	47.6
41	South Korea	43.1	41	Sri Lanka	47.5
42	Philippines	42.8	42	Australia	46.7
45	Canada	42.1	43	Philippines	46.5
45	Russian Federation	42.1	44	Russian Federation	46.5
47	China	41.8	45	China	45.9
47	Ireland	41.8	47	South Korea	45.5
49	India	41.6	49	Canada	45.1
51	New Zealand	41.2	51	Belgium	44.8

Source: Own elaboration, using data from the Global Muslim Travel Index 2017, 2018.

For example, Thailand has retained its second position and provides a wide range of Muslim-friendly digital services, some created by the official tourism body and others by private, internationally active companies. The United Kingdom is still third because it has extensive Muslim-friendly online services (see Tables 1 and 2).

Table 2. The online services provided by the destinations studied and their positions in the Global Muslim Travel Index (GMTI) ranking in 2017 and 2018.

Country	Ranking Position Comparison	Percentage of Muslims in Population	Apps Websites Muslim-Friendly	Body	Function
			Halal route App2016	The Tourism Authority of Thailand, with the support of several of the country's institutions	Reserve halal hotels through a travel agent or online
Thailand	2017 2nd 2018 2nd	6%	Grab Halal	The Tourism Authority of Thailand (TAT)	A list of 300 hotels, restaurants and take-away food outlets
			Halal Trip platform and App 2015	Acquired by CrescentRating in 2013	The largest Muslim-friendly travel platform. Share and review mosques, Halal restaurants, Halal food dishes, attractions and ideas for trips. Kaaba direction finder, prayer times, in-flight prayer time calculator.
			Halal booking Thailand Muslim-friendly App	Founded in 2009 by private individuals	Platform for reserving Muslim-friendly accommodation
				The Tourism Authority of Thailand	Search for restaurants, hotels, mosques
			Thai Halal App	Halal certification body	Halal product search tool
UK	2017 3rd 2018 3rd	6.3%	Halal Dining Club app2016	Halal Dining Club	Over 3500 restaurants in several cities: London, Toronto, Birmingham, Kowloon, Bangkok, New York, Manchester, Paris.
			The Halal Monitoring Committee Website and App	The most trusted halal certification organization in the UK, with the support of over 600 Mosques	The country's halal-certified products and services
			Halal Joints	Private investors	Listing of 560 Halal Restaurants, available for other countries
			Halal Restaurants Finder App	Private investors	Restaurants, mosques and markets
			The Japan Muslim Guide	Japan Halal Business Association	Information on accommodation, restaurants and mosques for Muslim visitors to Japan
	2017 6th 2018 4th	0.15%	Halal Minds App 2013	Private investors	Halal products in Japanese supermarkets
Japan			Kyoto Muslims 2014	Kyoto Convention & Visitors Bureau (KCVB)	A travel guide
			Halal Gourmet Japan App	Halal Media Japan	Find restaurants and mosques, has over 897 halal and vegetarian restaurants
			Halal Navi app	Private investors	Accompanies Muslim tourists and facilitates their itinerary through Japan, providing users with the country's Muslim-friendly routes, the locations of the Muslim-friendly restaurants and hotels and each prayer space in the country
			Japan Masjid Finder App	Private investors	Muslim-Friendly Guide Over 200 prayer spaces, as well as restaurants and hotels
			Have Halal Will travel 2016	Private investors	Halal trip planner, offering the routes with the most Muslim-friendly services and establishments

 Table 2. Cont.

Country	Ranking Position Comparison	Percentage of Muslims in Population	Apps Websites Muslim-Friendly	Body	Function	
Taiwan	2017 7th	0.3%	Taiwan halal Apps	The official International Halal Taiwan	Displays the companies that participate in the Taiwan International Halal Expo	
	2018 5th		Halal.TW App	Taiwan university students	Search for prayer spaces and Halal food, restaurants and hotels, connecting to Taiwan's Muslim community	
			Taiwan Tourism Bureau website—Muslim-friendly	Taiwan Tourism Bureau	You can get halal travel suggestions and the latest Muslim-friendly Environments	
Australia	2017 14th 2018 10th	3%	Halal Advisor	Private investors	Over 2,000 halal restaurants, Australia's top halal food application, includes the option of take-away food	
			Zabihah	Private investors	Guide to restaurants, markets and mosques, a list of over 20,000 establishments in Australia, USA, Europe, Singapore, Hong Kong and Africa	
Canada	2017 19th	3.2%	Scan Halal App	Private investors	Identifies the sources of the ingredients (plant, animal, synthetic, etc). Over 750,000 products. Over 15,000 restaurants in Canada, South Korea and the USA	
			The Crave Halal app	Private investors		
Spain	2017 9th 2018 12th	4%	Online Halal Guide	Turespaña, the public body for marketing tourism in Spain	In several languages, including Arabic, it aims to help Muslim tourists to locate prayer spaces and halal services in Spain	
			The Halal International Tourism website 2015	Instituto Halal and InnovaTaxFree Group	Aims to provide information about Halal tourism services that have been certified by the Instituto Halal in Spain	
New Zealand	2017 23th 2018 20th	1.1%	Halal Guide for New Zealand Tourism	Tourism New Zealand, in association with the Federation of Islamic Associations of New Zealand (FIANZ) and the Kiwi Muslim Directory	Halal restaurants, hotels, supermarkets and grocery stores, illustrated with photos of the most typical dishes of several regions, in order to promote their local products, such as lamb and cheeses, to the Muslim world and thus increase exports	
South Africa	2017 4th 2018 7th	2%	South African Muslim Directory app 2018	Not financed by any group, organization or government but rather by the advertisers and commercial sponsors.	Online guide to all the country's Muslim-friendly places	
			Halal Tourism Basic Guidelines and Glossary 2018	Cape Town Tourism (CTT) commissioned the project team led by CrescentRatingPte Ltd	Guide to inform the country's companies about the needs of the Muslim market segment and its economic importance	

Source: own elaboration.

Sustainability **2020**, 12, 1778 8 of 13

Japan has climbed two positions, probably because it promotes its food (despite the fact that it does not have much to offer that is halal) by suggesting alternatives, such as vegetarian restaurants and restaurants specializing in fish and seafood, and this has helped it to improve its position in the ranking. Taiwan has climbed from seventh to fifth as a result of the efforts made by its public tourism board, which promotes, on its website, the companies and products that participate in the Taiwan International Halal Expo. It also provides apps that make it easier for Muslim tourists to stay in Taiwan.

Both Australia and Canada have improved their rankings by four positions, since they have great Muslim-friendly digital services. These are provided by private companies that manage the websites and applications promoting the local and international Muslim-friendly offering.

New Zealand has improved its ranking in the list of the 20 most Muslim-friendly countries of the non-Muslim-majority countries, benefiting from its online Muslim-friendly guide. This guide was prepared by the official tourist board to promote its products and increase exports of food, including lamb, cheese and kiwi, to Muslim countries.

On the other hand, countries that provide few such services have dropped down the ranking considerably. In Spain's case, it should be emphasized that it has many resources that can attract the Muslim market segment, including the monuments dating from the time of al-Ándalus (the area of Spain conquered by Muslims). Although it is the second most-visited country for worldwide tourism, between 2017 and 2018 Spain dropped down three positions in the rankings of Muslim-friendly countries to twelfth. South Africa has also come down the rankings because it lacks Muslim-friendly online services (see Tables 1 and 2). However, it clearly realized this, and in 2018 it created some services which helped it to recover its position in the 2019 ranking.

Of all the countries studied (see Table 2), it stands out that those that have risen in the ranking, despite not having a great Muslim-friendly offering, are those whose official bodies have launched online platforms to communicate with the Muslim market segment and promote themselves as destinations before such platforms were created by private bodies.

5. Discussion and Conclusions

Tourist destinations have a critical need to understand tourism and consumer experiences. We can state that there is a new generation of tourists who are forcing destinations to evolve in their direction to meet their needs and expectations [7] and depend on their mobile phones while traveling [97]. Destinations should promote applications as the preferred means of buying online and formulating appropriate strategies [98], since digital technologies make possible an efficient and sustainable public-private-consumer collaboration [99,100]; the use of ICT helps people who plan vacations to obtain detailed information, which gives them security and facilitates decision-making [101]. This will help ensure they enjoy the destination and can interact well with the local population [29,102,103]. It can therefore be said that online services suitable for Muslims are important for a country to achieve a good position in the ranking of Muslim-friendly destinations and to be able to attract that segment.

Ever increasing numbers of tourists use their mobile phones, not only to plan the journey and make reservations but also to increase their enjoyment of the trip [98]. Destinations should therefore promote applications as one of the preferred methods for purchasing online and formulating appropriate strategies [99].

Additionally, the growing number of people travelling internationally makes it essential for destinations to diversify their tourism offering, ensuring that they adapt to the needs of the market segments with greatest growth potential. Dialogue with tourists and product promotion should not only take place face to face at the destination but also online, and with new technologies exclusive channels may also be used.

One of the novel aspects of this work is its focus on the Muslim segment. This market segment is increasing because it is young and has considerable spending capacity. This has led the most sustainable and smart countries to adapt their services to the religious and cultural needs of the Muslim market segment, thus becoming Muslim-friendly destinations.

Sustainability **2020**, *12*, 1778 9 of 13

Countries that have Muslim-friendly products and services should use the channels provided by ICTs to promote them [89], since Muslim-friendly online sites help tourists decide when choosing their destination and they allow them to plan and enjoy their trips [104]. Specialized applications also allow restaurants and hotels to provide information about their Muslim-friendly services through an exclusive channel without having to show their Halal certificates on the premises [96]. These online sites thus help destinations to promote their products and therefore increase their exposure to Muslim-majority countries.

For a country to be well-positioned in the ranking of Muslim-friendly destinations and therefore be able to attract the Muslim segment, it must necessarily have digital resources aimed at that segment. According to the analyses in this study, it is advisable that official bodies be the first to invest in the Muslim market segment so that private tourism companies realize its potential and react by providing Muslim-friendly services. In turn, the more Muslim-friendly offerings are provided, the more technology companies will launch digital platforms and mobile apps promoting the country and its Muslim-friendly tourism offering. Muslim-friendly applications help promote a country's products and therefore its international trade.

Becoming a smart, Muslim-friendly destination makes the country more sustainable as the apps and services can be used by Muslims living in the country, who are usually ignored by companies as they are a minority segment.

There is increased interest in researching how to attract the Muslim market segment and the best way to become a Muslim-friendly country, but one of the novel aspects of this study is its focus on digital technologies. This is therefore the first study to focus on the digital Muslim-friendly offering as a prerequisite to being most fully and efficiently a sustainable, smart Muslim-friendly destination. Another novel aspect of this study is the analysis of the nine sustainable smart tourist destinations with outstanding rankings in 2017 and 2018.

Future lines of research could analyze a more extended period by adding in the data for 2019. Similarly, by increasing the number of sustainable smart Muslim-friendly tourism destinations to 25 or 30. Finally, future studies could apply these concepts to other market segments.

Author Contributions: This paper is part of the PhD project of. F.B.; "Conceptualization, F.B. and P.C-V.; methodology, F.B. and P.C-V; formal analysis, P.C-V.; F.B. and E.N-B.; investigation, P.C-V. and F.B.; resources, F.B.; writing—original draft preparation, F.B.; writing—review and editing, P.C-V.; F.B. and E.N-B.; visualization, P.C-V.; F.B. and E.N-B.; supervision, P.C-V. All authors have read and agreed to the published version of the manuscript.", please turn to the CRediT taxonomy for the term explanation. Authorship must be limited to those who have contributed substantially to the work reported.

Funding: This research received no external funding.

Conflicts of Interest: The authors declare no conflict of interest.

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