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June 2023

MASTERCARD
CRESCENTRATING

**GLOBAL
MUSLIM
TRAVEL
INDEX
2023**

#GMTI2023

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01

Foreword



Foreword



Fazal Bahardeen

Founder & CEO
CrescentRating
HalalTrip



As we navigate global travel's dynamic and ever-evolving landscape, we are pleased to present the 8th edition of the Mastercard-CrescentRating Global Muslim Travel Index (GMTI) 2023 report. Our annual report continues to provide vital insights into the Muslim travel market, a segment that demonstrates robust growth and resilience in the face of global challenges.

This year, we have enhanced our report by adding new features and providing more analysis. One of the new features we have included is the Muslim Travel Intent Tracker (MTIT), a unique tool that helps us understand the travel intentions of Muslim travelers over time. We will monitor this metric monthly to provide an overview of the Muslim traveler community's changing travel trends and preferences.

We are also excited to introduce the Muslim Traveler Responsible Tourism Framework this year. We have designed this framework to assist Muslim travelers in adopting sustainable and responsible travel practices that align with their faith. It also provides practical tips for preserving cultural heritage, boosting local economies, and promoting environmental sustainability in line with global tourism industry initiatives.

The GMTI 2023 ranking once again provides a comprehensive look at the performance of destinations in catering to Muslim travelers. Indonesia has caught up again with Malaysia to claim the joint top position this year. They are followed by Saudi Arabia, UAE, Turkey, and Qatar. Among the non-OIC destinations the top 4 are Singapore, the United Kingdom, Taiwan, and Thailand. This year we have also identified the top Muslim Women friendly destinations.

The newly introduced GMTI Performance Matrix (GPM) offers a unique perspective on the interplay between the GMTI scores and

the proportion of Muslim visitors to the overall visitors in each destination. This tool will assist destinations in formulating strategies to enhance their appeal and services for Muslim travelers. We also shed light on the highlights and opportunities at the key touchpoints of a Muslim Traveler journey.

In 2022, there were 110 million Muslim international visitors accounting for 12% of all international arrivals. This is a considerable growth, equivalent to nearly 68% of the pre-pandemic levels seen in 2019. We predict that Muslim traveler arrivals will rise to 140 million in 2023 and recover to the pre-pandemic levels of 160 million in 2024. Our projections are that Muslim arrivals will reach 230 million by 2028, with an estimated expenditure of USD 225 Billion.

With our long-term partner, Mastercard, we continue to dive deep into Muslim demographics and the travel market, highlighting the importance of understanding this diverse, vibrant, and influential segment. Our data and insights aim to equip stakeholders with the knowledge and tools to cater to the unique needs and preferences of Muslim travelers, an effort that will benefit the Muslim travel market and the broader travel industry.

The GMTI 2023 report is an indispensable resource for those in the travel industry, providing crucial insights and strategies to tap into the Muslim travel market. We firmly believe this report will equip all travel and tourism industry stakeholders with a comprehensive understanding of the Halal tourism landscape, enabling them to capitalize on the myriad opportunities presented by the thriving Muslim travel sector.

Foreword



Beena Pothan

*Country Manager
Malaysia and Brunei
Mastercard*

Across the world, travellers are packing their bags and taking to the skies like never before. And despite the uncertain global economy, international travel is not just catching up to pre-pandemic levels, it is surpassing them.

Research from the Mastercard Economics Institute shows that by March this year global leisure flight bookings were up 31% compared to the same month in 2019, driven in no small part by the lifting of travel restrictions across Asia.

Business travel, which initially recovered at a slower pace than leisure travel, has caught up and is now growing at a similar rate – thanks to a return to office culture and a demand for face-to-face business interactions.

With the mainland China market re-opening at the start of this year, releasing a huge pent-up demand for travel for Chinese travellers, this shift from recovery to growth is expected to continue well into 2023 and beyond.

But as airports grow capacity and destinations begin to fill with eager tourists, it is important to see how travel is changing and how that in turn is reshaping today's travelers.

Our research shows that travelers are prioritizing their spend on experiences - restaurants, recreational activities

and entertainment – over things such as clothing, jewellery and electronics. Increasingly they are looking for unique experiences that connect them to their passions, especially those that they missed out on when travel was restricted.

We are also seeing travelers explore new locations. Potentially influenced by social media and entertainment, they are landing in lesser-known destinations in search of greater cultural immersion.

These trends are true across all traveler profiles, including the highly influential Muslim traveler. This segment is a hugely important demographic for global travel and for Asia in particular, with countries such as Indonesia, Malaysia and Singapore topping the list of preferred destinations for Muslim travelers in this year's **Mastercard-CrescentRating Global Muslim Travel Index**.

Mastercard is deeply committed to supporting the ongoing recovery of global travel and its future growth and expansion. Which is why we are excited to continue our collaboration with CrescentRating and to provide the invaluable data and insight that will help the tourism sector and related industries adapt and innovate to meet the needs and expectations of the new global traveler.



Navin Jain

*President Director
PT Mastercard Indonesia*



Mastercard & CrescentRating's Commitment to Empowering the Muslim Lifestyle Market

Mastercard and CrescentRating's partnership exemplifies the unwavering commitment to providing comprehensive data and in-depth insights for the Muslim lifestyle market. Over the course of nine years, we have released 25 reports, delving into various facets of Muslim travel, lifestyle, and consumer behavior.

At the core of the collaboration lies the Global Muslim Travel Index (GMTI), the flagship publication that has become the cornerstone of our research efforts. This 8th edition, GMTI 2023, symbolizes our ongoing commitment to monitoring and analyzing the Muslim travel market.



Download the Reports here

Global Muslim Travel Index (GMTI)

- GMTI 2023
- GMTI 2022
- GMTI 2021
- GMTI 2019
- GMTI 2018
- GMTI 2017
- GMTI 2016
- GMTI 2015

Consumers

- Muslim Gen Z Travel report 2023
- Muslim Women In Travel 2019
- Digital Muslim Travel 2018
- Muslim Millennial Travel 2017
- Muslim Business Traveler 2016

Economies

- Ramadan & Eid Lifestyle 2022
- Travel Readiness 2020
- Halal Travel Frontier 2020
- Halal Travel Frontier 2019
- Halal Travel Frontier 2018
- Ramadan Travel 2016

Countries

- Indonesia Muslim Travel Index 2019
- Indonesia Muslim Travel Index 2018
- Japan Muslim Travel Index 2017

Industries

- Halal Food Lifestyle Indonesia 2021
- Halal Food Lifestyle - Singapore 2021
- Muslim Travel Shopping Index 2015



What is New in this Report



Muslim Travel Intent Tracker (MTIT)

The Muslim Traveler Intent Tracker (MTIT) is a metric designed to gauge and monitor the travel intent of Muslim travelers over time. By considering various timeframes, from immediate travel plans to those planned over a year in advance, the MTIT captures the dynamic and evolving preferences of the Muslim traveler market. The MTIT will be tracked and published monthly.



Muslim Traveler Responsible Tourism Framework

The Responsible Tourism framework, from a Muslim perspective, is an initial approach to sustainable and responsible travel that aligns with faith traditions and teachings. This framework is designed to guide Muslim travelers in making mindful choices that promote socio-cultural, socio-economic, and environmental sustainability while upholding the values of the faith. It aims to empower Muslim travelers to play an active role in preserving cultural heritage, supporting local communities, and ensuring environmental sustainability, ultimately contributing to a more equitable and sustainable global travel industry.



GMTI Performance Matrix (GPM)

The GMTI Performance Matrix (GPM) is a strategic analytical tool designed to evaluate destinations' performance and potential in the Muslim travel market. By incorporating the Global Muslim Travel Index (GMTI) scores and the percentage of Muslim visitors to overall visitors, the GPM provides an overview of destinations' ability to cater to Muslim travelers and their success in attracting this growing market segment.



Muslim Women Friendly Destinations

This year, we feature destinations that provide a welcoming and comfortable experience for Muslim women travelers. In determining the overall experience of Muslim women travelers, factors like climate, faith restrictions, general safety, sustainability, and other relevant indicators are considered within the Environment criteria of the ACES model.

Key Takeaways of GMTI 2023

The Resilience and Growth of the Muslim Travel Market

The Muslim travel market has shown resilience and strong growth despite global challenges, with international arrivals reaching 68% of pre-pandemic levels in 2022. The sector is on a promising recovery path, projected to reach 87% of 2019 levels in 2023 and a full recovery by 2024. Looking ahead, the market is expected to expand significantly, with projections of 230 million Muslim arrivals and USD 225 billion in expenditures by 2028. Asia leads in Muslim arrivals, followed by Europe, Africa, the Americas and Oceania, indicating potential for growth and better accommodation of Muslim travelers in various regions.

Promising Progress and Top Destinations in the Post-COVID Era

With international tourism fully reopening, some destinations have seized this opportunity by improving connectivity, implementing effective marketing campaigns, creating a supportive atmosphere, and upgrading facilities to cater to the needs of Muslim travelers. In the GMTI 2023 rankings, Indonesia and Malaysia share the top position, with Indonesia reclaiming its previous rank. The United Kingdom rises eight positions to secure the 20th spot. Singapore maintains its leading position among non-OIC destinations, followed by the UK and Taiwan.

Evolving Preferences and Destinations

The Muslim Travel Intent Tracker (MTIT) is a new tool monitoring the travel intent of Muslim travelers, providing valuable insights into their evolving preferences. Recent data shows a consistent preference for short-term travel with growing interest in mid-term plans. Long-term travel intent fluctuates, influenced by global conditions. Popular destinations include Saudi Arabia for Hajj and Umrah, as well as Australia, Canada, Italy, Japan, Spain, and the UK.

23 Destinations in the “Trailblazer” Quadrant

The mapping of the 138 destinations into four distinct quadrants - Trailblazers, Potential Leaders, Emerging Destinations, and Untapped Opportunities - provides insightful analysis and allows destinations to strategize their efforts to better cater to Muslim travelers. This year there are 23 destination that are in the GPM “Trailblazer” quadrant. The total Muslim arrivals to these destination was around 67 Million, representing 61% of the total global Muslim arrivals.

Muslim Women Friendly Destination

This year’s GMTI identifies the top Muslim Women Friendly destinations within the destinations listed in the index. Malaysia and Singapore lead in this list in the OIC and non-OIC category respectively.

AI Tools Redefining the Travel Experience

The rise of AI in travel solutions, as pointed out in the 2018 “Mastercard-Crescentrating Halal Travel Frontier” report, has come to fruition. AI is disrupting the travel industry, emphasizing the need for unbiased, AI-enabled solutions that cater effectively to Muslim travelers.

Highlights & Opportunities at Key Touchpoints

The GMTI 2023 has effectively highlighted the crucial touchpoints for Muslim travelers, divided into Tangible (Hard) and Intangible (Soft) factors. The analysis of these touchpoints allows destinations to understand and cater to the needs and expectations of Muslim travelers better.

Why Embracing the Muslim Travel Market is a Strategic Imperative

Pre-pandemic, the Muslim travel market was witnessing exponential growth. As travel moves to the growth phase post-COVID, this market presents many opportunities for destinations and businesses worldwide. Businesses and destinations need to recognize and adapt to the unique needs of this market segment. This goes beyond just offering halal meals and places to pray. It necessitates a calculated strategy considering Muslim travelers' particular cultural practices, faith traditions & sensitivities.

Here are six compelling reasons businesses and destinations should think strategically about Muslim travelers. By developing these strategies, businesses can enhance their revenue streams and foster long-lasting brand loyalty, gain a competitive edge, and contribute to promoting inclusive and responsible tourism practices.



Rapidly Growing Market

The Muslim population is growing faster than the global population, leading to more Muslim travelers seeking new experiences worldwide. The global Muslim population will reach 2.3 Billion by 2030, representing 27% of the global population.



High Spending Potential

Muslim travelers have been identified as having a relatively high spending capacity, particularly in travel, accommodation, and dining, as they generally tend to travel as families.



Cultivating Brand Loyalty

Muslim travelers tend to be brand loyal and value businesses that understand and cater to their cultural and faith-based requirements. Therefore, businesses can foster strong brand loyalty by providing services and facilities that meet these needs, such as halal food options and prayer facilities, leading to repeat visits and positive word-of-mouth referrals.



Competitive Advantage

Businesses and destinations that cater to Muslim travelers will gain a competitive advantage. By offering tailored services and facilities for Muslim travelers, businesses can differentiate themselves from competitors and attract a larger share of this growing market.



Enhancing Destination Appeal

Destinations can showcase their inclusivity and cultural sensitivity, making them more attractive to a broader range of travelers. This positive perception can lead to increased tourism and more outstanding international recognition, benefiting local businesses and the economy as a whole.



Socially Responsible Tourism

Businesses can demonstrate their commitment to inclusivity, diversity, and cultural understanding. This benefits the local community by promoting cross-cultural exchange and aligns with the growing trend toward responsible and sustainable tourism practices.

02

Muslim Travel Trends



Global Trends that are Shaping the Muslim Travel Market



Sustainable and Eco-friendly Tourism:

A growing awareness of the impact of tourism on the environment and local communities has led to rising demand for sustainable and eco-friendly travel options. Travelers are increasingly seeking out destinations, accommodations, and activities that prioritize environmental conservation, ethical practices, and the well-being of local communities. Muslim travelers will also seek eco-friendly options that align with their faith traditions of responsible stewardship and environmental care.

Health and Wellness Tourism:

With an increased focus on personal well-being, the health and wellness tourism sector is expanding rapidly. Travelers are opting for destinations that offer wellness retreats, spa experiences, and opportunities to engage in outdoor activities to rejuvenate their bodies and mind. Muslim travelers will increasingly seek health and wellness experiences that meet their religious and cultural requirements.

Experiential and Authentic Travel:

Today's travelers are more interested in immersive experiences that allow them to connect with the local culture, traditions, and people. As Muslim travelers seek more authentic experiences, creating unique, culturally-sensitive offerings will be essential.



Personal Development Travel:

The increasing trend of combining work with leisure and personal development is shaping the travel industry in various ways. As remote work becomes more prevalent, travelers seek destinations that allow them to maintain their professional obligations while engaging in personal development experiences. Destinations and businesses can develop programs specifically tailored to Muslim travelers, focusing on various aspects such as spiritual growth and skill-building.

Leveraging AI Tools to Enhance Muslim Traveler Experience

Responsible Use of AI Tools:

CrescentRating & Mastercard's influential 2018 "Halal Travel Frontier" report highlighted "Developing Unbiased AI-Enabled Travel Solutions" as one of ten major trends to watch. With AI tools such as ChatGPT emerging as game-changers across industries, their impact on the travel sector is undeniable. However, in this evolving landscape, these tools must be calibrated to appreciate and respect Muslim travelers' unique needs and values.

Responsibly harnessing these AI innovations promises a transformative potential for the Muslim travel market. With personalized experiences, tailored recommendations, and nuanced marketing strategies, these tools are shaping a new era for the travel industry – one that better resonates with and caters to the distinct demands of this growing demographic.

Enhanced Customer Service:

AI-powered chatbots like ChatGPT can provide 24/7 customer support, helping travelers with inquiries, bookings, and problem-solving. This leads to improved customer experiences and streamlined communication. They can be tailored to cater to the unique needs of Muslim travelers, providing culturally-sensitive support and addressing specific inquiries related to halal-friendly options and facilities.

Personalized Recommendations:

AI tools can analyze user data to offer personalized travel recommendations, including accommodations, attractions, and dining options tailored to individual preferences. As such, they can recommend Muslim travelers, including halal dining options, accommodations with prayer facilities, and attractions that align with their traditions.

Optimized Offering:

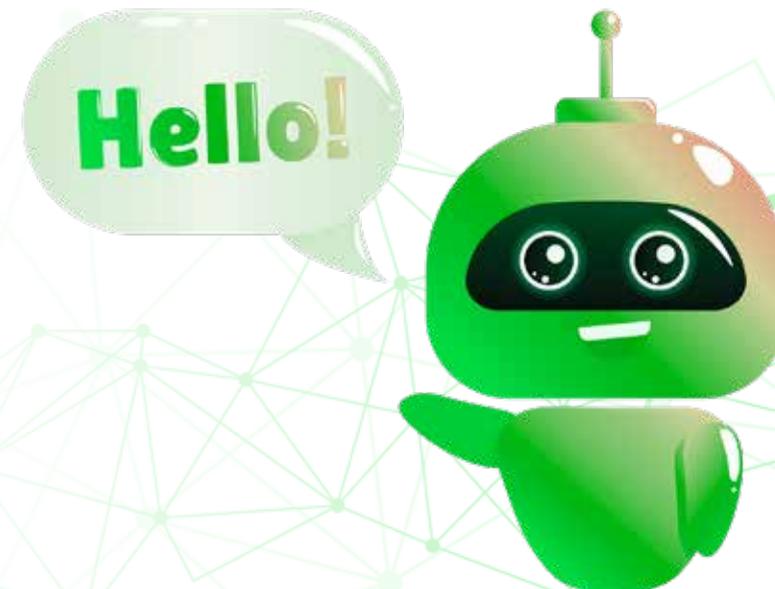
AI-powered yield management can help businesses better understand the Muslim travel market's specific demand patterns, allowing them to optimize their offerings and pricing strategies accordingly.

Streamlined Trip Planning:

AI-powered platforms can analyze vast amounts of data to identify trends and provide insights that help travelers plan their trips more efficiently and effectively. As such, AI tools can provide insights and recommendations specifically tailored to Muslim travelers, helping them plan their trips more efficiently by highlighting halal-friendly options, prayer timings, and other relevant information.

Targeted Marketing:

AI tools can assist businesses in developing targeted marketing campaigns that resonate with specific customer segments, driving engagement and conversions. They can help businesses in developing marketing campaigns that resonate with Muslim travelers, addressing their unique needs and preferences while showcasing the destination or business's commitment to inclusivity and cultural understanding.



03

Muslim Traveler Intent Tracker (MTIT)



Muslim Traveler Intent Tracker (MTIT)



The Muslim Traveler Intent Tracker (MTIT) is a metric designed to gauge and monitor the travel intent of Muslim travelers over time. By considering various timeframes, from immediate travel plans to those planned over a year in advance, the MTIT will capture the dynamic and evolving preferences of the Muslim traveler market.

The MTIT will be tracked and published monthly, ensuring that industry stakeholders stay informed about current trends, anticipate future demand, and identify potential growth opportunities in the Muslim travel market.

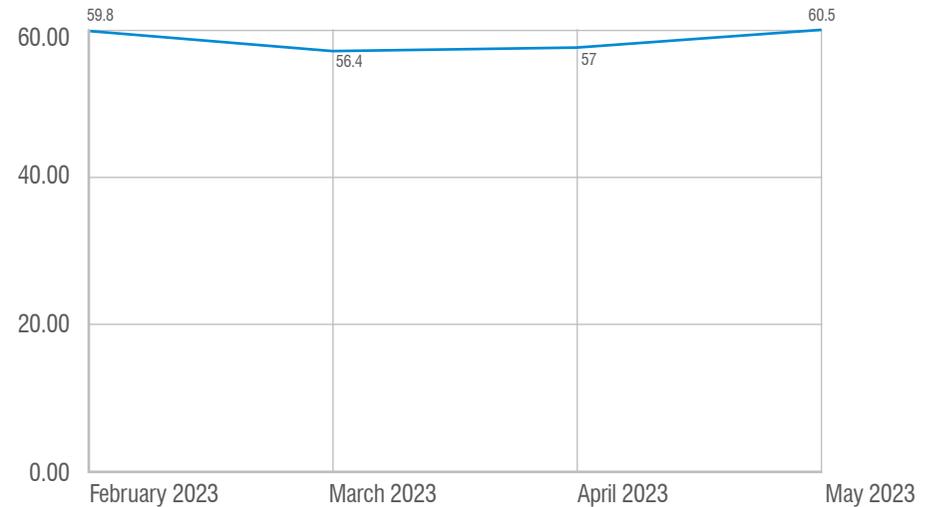
The algorithm used to calculate the travel intent score is based on assigning weights to different time frames representing various future travel plans.

The current data covers the surveys from February 2023 to May 2023. The surveys were conducted the first week of each month.

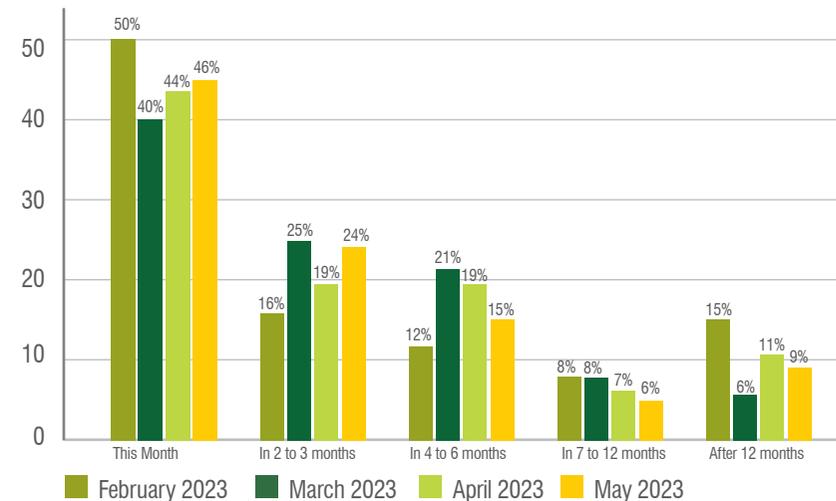
The data show a consistent preference for short-term travel plans, with a growing interest in mid-term travel planning. In addition, the intent for travel after six months up to 12 months remains relatively stable, while long-term travel intent experiences fluctuates across the surveyed months. This variation in long-term travel intent could be influenced by factors such as global travel conditions, economic trends, or socio-political events.

By understanding these trends, businesses, and destinations can tailor their offerings and marketing strategies to better cater to Muslim travelers' evolving needs and preferences.

MTIT Score



Travel Intent





04

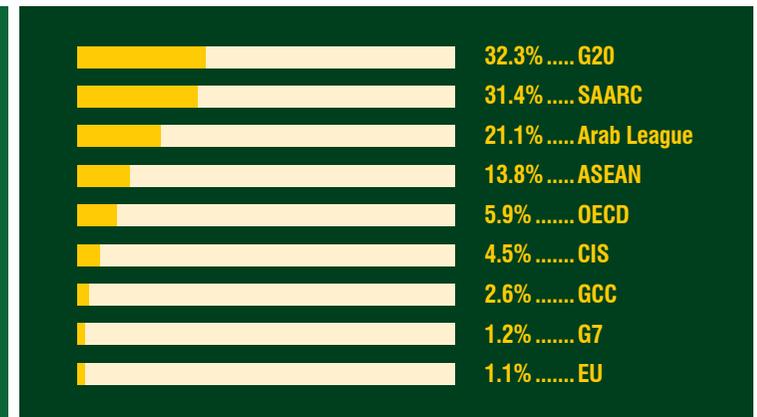
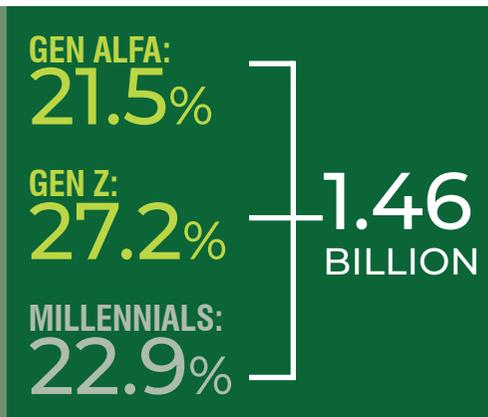
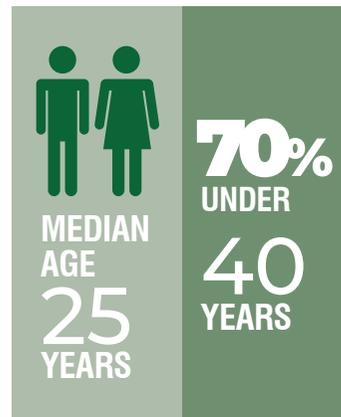
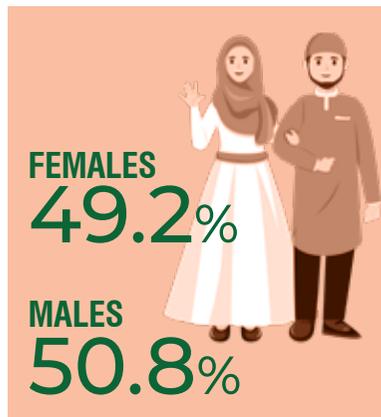
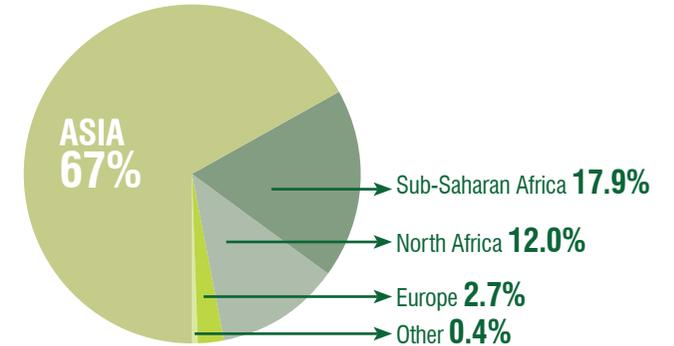
Muslim Demographics & Travel Market



Muslim Demographics



PERCENTAGE OF MUSLIM POPULATION



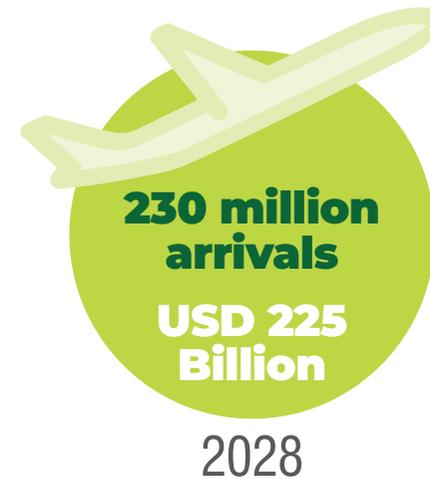
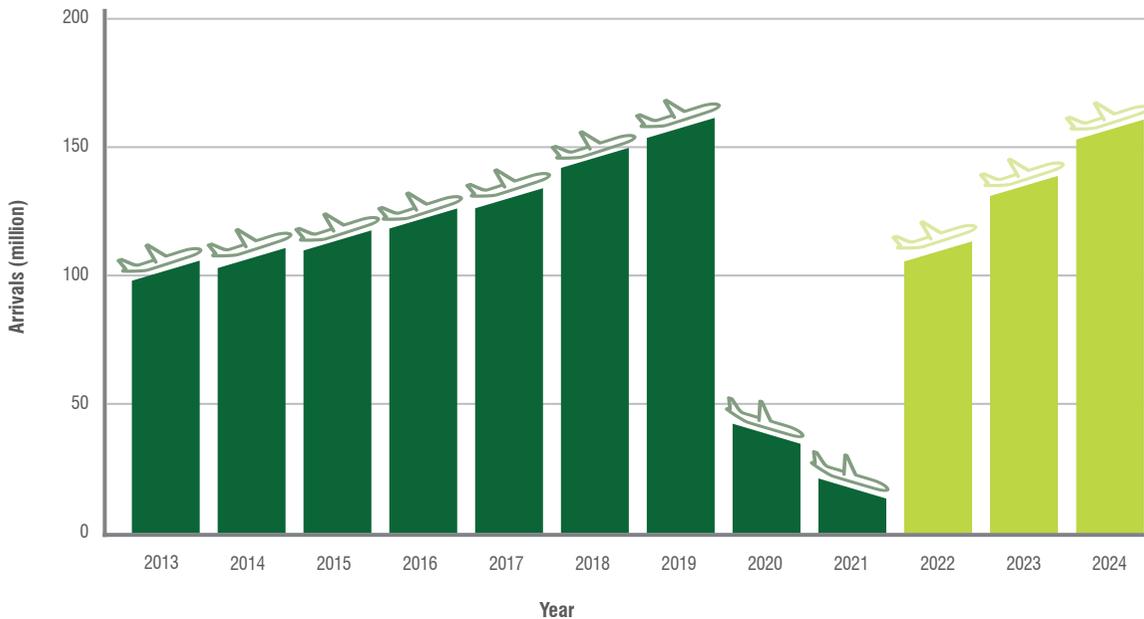
Muslim Travel Market Outlook

Despite global challenges, the Muslim travel market has demonstrated resilience and robust growth. After experiencing the downturn due to the COVID-19 pandemic, this sector is now on a promising recovery trajectory.

In 2022, Muslim international arrivals reached 110 million, capturing 68% of the 2019 pre-pandemic levels. This indicates a strong rebound and shows the willingness and ability of Muslim travelers to resume international travel as conditions permit.

The growth trend is set to continue, with projections for 2023 expecting the arrivals to reach 140 million. This would represent 87% of the 2019 levels, further solidifying the recovery process. By 2024, a full recovery is projected, with the total Muslim arrivals matching the 2019 figures of 160 million. This return to pre-pandemic levels signifies a recovery and revival of the Muslim travel market.

Looking further into the future, the outlook remains positive. By 2028, the Muslim travel market is projected to reach unprecedented heights, with Muslim arrivals expected to hit 230 million. This represents a significant increase from the 2019 levels, indicating that the growth of the Muslim travel market is not just a recovery but an expansion. Moreover, the expenditure by Muslim travelers is projected to be USD 225 billion by 2028. This underlines the economic significance of this market segment and its potential to contribute to the global travel industry's recovery and growth.



Comparative Analysis: Global and Muslim Travel Arrivals by Region

Asia leads the way in terms of Muslim arrivals. More than 31% of arrivals are Muslim travelers. This is not surprising given the region's significant Muslim population, particularly in Southeast Asia and the Middle East, and its Muslim-friendly offerings that cater to various travel preferences. This also indicates that travelers prefer nearby destinations for travel rather than traveling long haul after the pandemic. It is also the impact of higher airline prices.

Despite having relatively lower international arrivals, Africa's share of Muslim arrivals is significant at more than 21%. This suggests that Africa is a key destination for Muslim travelers, due to its rich cultural diversity, historical Islamic heritage, and large Muslim populations across Africa, particularly North Africa.

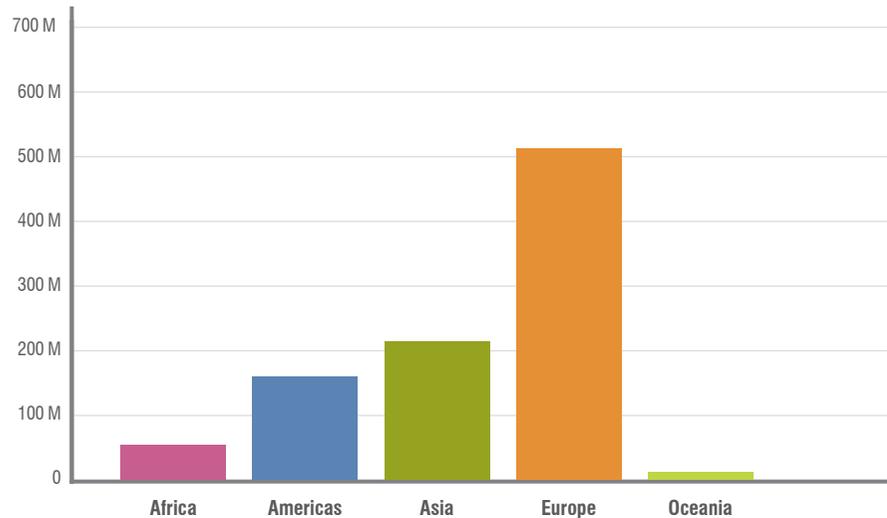
Europe, the region with the highest global arrivals, sees a relatively smaller proportion of Muslim arrivals at around 6%. While Europe is home to many popular

travel destinations, the gap suggests potential for growth in better accommodating Muslim travelers.

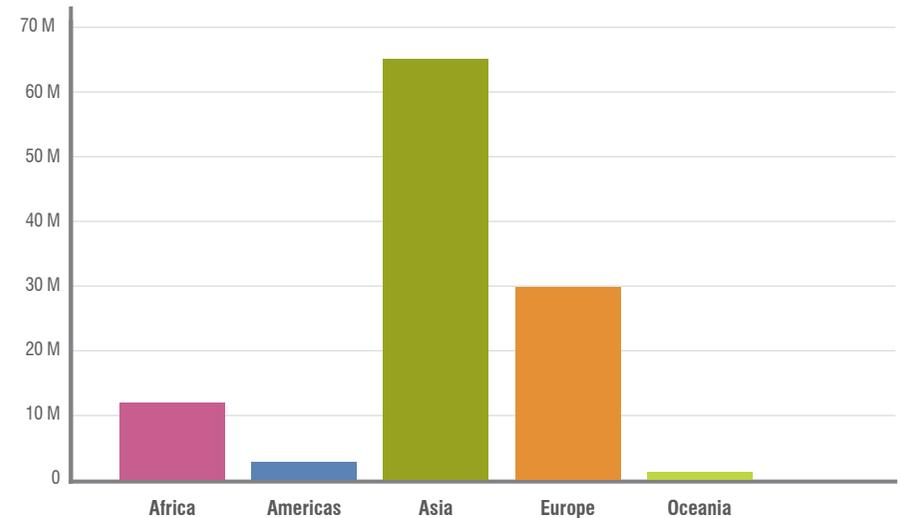
With the smallest global arrivals, Oceania also has a smaller share of Muslim arrivals, around 7%. This is not surprising given its geographic distance from many Muslim-outbound markets, but it indicates room for improvement in attracting and accommodating Muslim travelers.

Americas hosts the smallest proportion of Muslim travelers, at 2% of the total arrivals. This is due to various factors, including distance, travel costs, or perceived lack of Muslim-friendly facilities and especially in South American destinations. However, this also suggests the untapped potential for growth in the Muslim travel market.

Total Arrivals by Region



Muslim Arrivals by Region



05

Muslim Traveler Responsible Tourism Framework

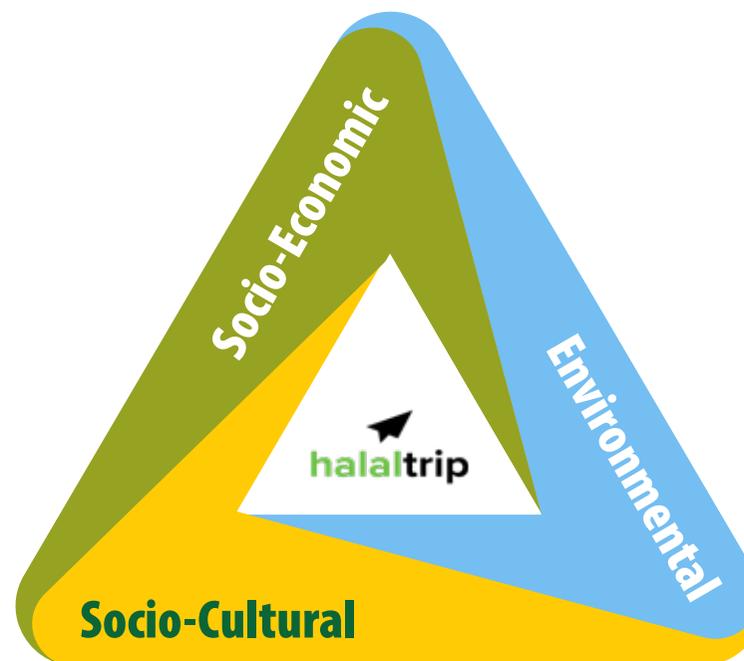


Responsible Travel Framework for Muslim Travelers

The Muslim Traveler Responsible Tourism Framework is a pioneering initiative designed by HalalTrip to address Muslim travelers' values and expectations within the broader context of sustainable and responsible tourism. This framework is intended to serve as a guide and reference point for all stakeholders in the tourism industry, from policymakers to service providers, to help create travel experiences that are not only sensitive to the religious and cultural needs of Muslim travelers but also promote environmental sustainability, socio-cultural respect, and economic balance.

It's important to note that this framework represents a starting point in our ongoing efforts to refine and evolve our understanding of responsible tourism for Muslim travelers. This first iteration will undoubtedly undergo enhancements and adjustments in response to feedback, new insights, and the evolving landscape of the global tourism industry.

As we move forward, we are committed to making this framework more comprehensive, accurate, and effective in facilitating responsible and inclusive tourism experiences for Muslim travelers.



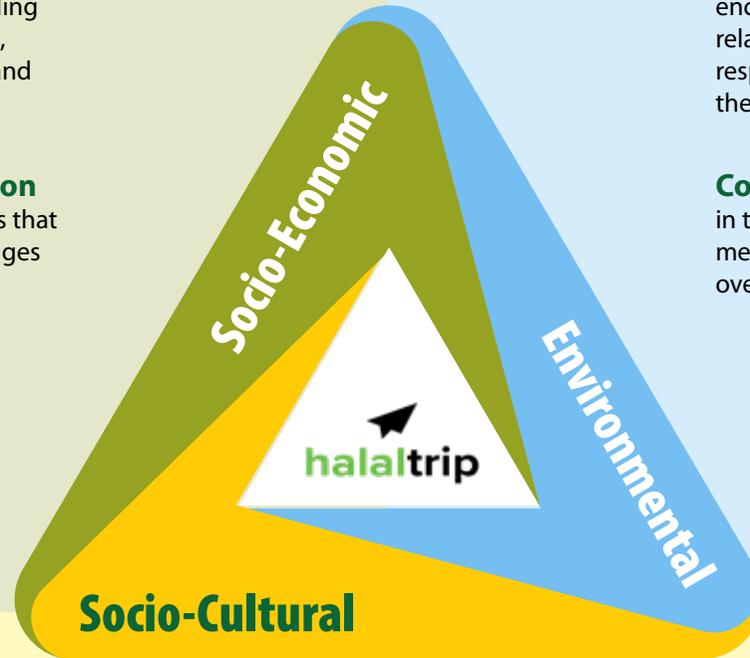
Muslim Traveler Responsible Tourism Framework 1.0

Local Communities can have their wellbeing supported by prioritizing spending in local businesses and community causes, which contributes to their broader social and economic development.

Fair Trade and Ethical Consumption can be practiced by supporting businesses that engage in ethical practices, such as fair wages and humane working conditions.

Interconnectedness as a key value, encourages travelers to appreciate the relationships between creation. This induces the respect and appreciation of the natural world at the destinations visited.

Compassion towards Animals with a basis in the faith traditions and values of kindness and mercy, ensures their welfare, which contributes to overall environmental sustainability.



Public Interest emphasizes the importance of preserving cultural heritage, and respecting local customs, traditions, and values. This fosters positive interactions with local communities, and promotes the conservation of heritage for future generations.

Education and Awareness will foster a deeper understanding of faith traditions, values and principles related to responsible tourism, empowering Muslim travelers to make informed choices and adopt practices that consider the wellbeing of the community.

Practical Tips to be Responsible Travelers

Interconnectedness

- Choose eco-friendly accommodations that prioritize sustainable practices.
- Opt for public transportation, carpooling, or walking/biking and travel during off-peak hours to minimize overcrowding.
- Carry reusable bags, bottles, and utensils to minimize single-use plastic waste.
- Conserve water by taking shorter showers and reusing towels.
- Turn off lights, air conditioning, and electronic devices when not in use.

Local Communities:

- Support local artisans and small businesses by purchasing souvenirs directly from them.
- Prioritize businesses, tour operators and restaurants that are locally owned.
- Dispose of waste properly, avoid littering, and recycle whenever possible.
- Select tour operators that demonstrate a commitment to sustainable tourism.
- Donate and contribute to local charities and community causes.

Public Interest:

- Learn about local customs, traditions, and etiquette to show respect.
- Dress modestly and appropriately according to local cultural norms.
- Learn a few words or phrases in the local language to foster positive interactions.
- Follow guidelines and rules for conduct at religious or historical sites.
- Engage in responsible volunteer opportunities that benefit the community.



Fair Trade and Ethical Consumption:

- Support businesses and tour operators that adhere to fair trade and ethical practices.
- Prioritize restaurants that source ingredients locally and treat their employees fairly.
- Seek out businesses that adhere to sustainable food waste management practices.
- Avoid bargaining excessively, as it may undermine the livelihoods of local vendors.
- Support social enterprises that invest in the local community.

Compassion towards Animals:

- Avoid visiting attractions that exploit animals for entertainment.
- Choose wildlife experiences that promote ethical and responsible interactions, such as visiting sanctuaries or rescue centers.

- Do not feed wild animals or disturb their natural habitats.
- Refrain from purchasing products made from endangered species or animal parts.
- Report any instances of animal mistreatment to local authorities or animal welfare organizations.

Education and Awareness:

- Attend workshops, talks, or seminars related to sustainable tourism and responsible travel practices.
- Share your responsible travel experiences and tips on social media to inspire others.
- Seek advice from local community members, tour guides, or fellow travelers on how to travel responsibly.
- Stay informed about the latest sustainable travel practices and trends.
- Encourage friends and family to adopt responsible travel habits and support sustainable tourism initiatives.

06

GMTI 2023 Overview



Trailblazing Change: The GMTI Transformation Over Time

The Mastercard-CrescentRating Global Muslim Travel Index (GMTI) has witnessed a remarkable journey of evolution and expansion since its inception.

Initially known as the CrescentRating Annual Ranking, it started in 2011 by assessing only the top 10 Muslim-friendly destinations. The following year saw it, covering 20 destinations.

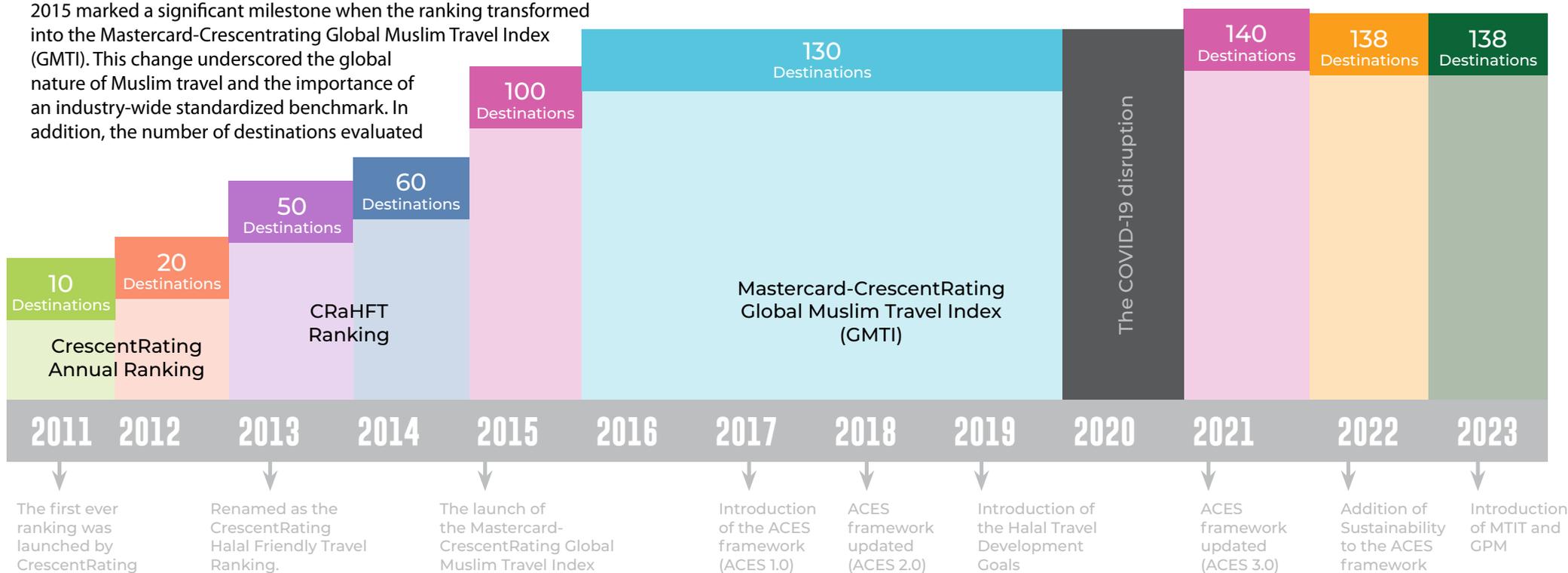
In 2013, the ranking evolved into the CRaHFT (CrescentRating Halal Friendly Travel) Ranking, indicating a more inclusive and comprehensive focus on Halal-friendly services and facilities. During this phase, the number of destinations expanded to 50 and increased to 60 in 2014.

2015 marked a significant milestone when the ranking transformed into the Mastercard-CrescentRating Global Muslim Travel Index (GMTI). This change underscored the global nature of Muslim travel and the importance of an industry-wide standardized benchmark. In addition, the number of destinations evaluated

also saw a significant leap to 100, illustrating the widening scope and recognition of Muslim travel needs.

From 2016 to 2019, GMTI continued to expand its reach, evaluating 130 destinations. However, the unprecedented global pandemic in 2020 led to a pause in the ranking.

In 2021, the GMTI resumed its evaluation with an even broader scope, assessing 140 destinations. In the past two years, 2022 and 2023, GMTI has maintained its assessment of 138 destinations, indicating stability and consistency amidst the continued recovery and growth of the global travel industry post-pandemic.



GMTI's Journey of Influence



+24,000 Downloads
(YoY* 55%)

+33,000 online article mentions

+1,800 citations in academic articles

+6,000 news media mentions
(YoY* 58%)

*YoY : Year-on-Year growth

ACES 3.0 Framework

Introduced in 2017, the ACES Framework, used in the GMTI is a comprehensive framework that assesses the Muslim-friendly travel facilities and services in a destination. ACES stands for Access, Communications, Environment, and Services. This model evaluates the level of inclusivity and support for Muslim travelers that destinations provide in various aspects of their travel experience:

- Ease of access to the destination
- Communication, internal and external, by the destination
- Environment at the destination
- Services provided by the destination

To evaluate the four key areas, quantitative measurements are used across various criteria and sub-criteria. The criteria scores are based on over 50 data sets and compiled using the ACES 3.0 Framework. The criteria and sub-criteria for the Muslim travel market have been updated since 2017 to stay with the current industry's growth, including changes in travel and lifestyle trends.

This year's model has two specific enhancements in the Environment category. The "Sustainability" metrics have been strengthened by analyzing a more comprehensive range of data, and the "Enabling Climate" data has been overhauled.



ACES Criteria Overview - Access & Communication



Access

The Access criteria evaluate the accessibility of a destination from the top 30 Muslim travel outbound markets. It considers various factors to assess the ease of reaching the destination. The criteria include air connectivity, land connectivity, visa requirements, and quality of transport infrastructure.

Connectivity: Air Connectivity focuses on the availability and frequency of direct flights between the destination and key Muslim outbound markets. Distance examines the geographical proximity of the destination, recognizing that shorter distances can contribute to easier access. Land Connectivity evaluates the quality of road networks and border crossings that connect the destination with Muslim-majority areas, facilitating smooth travel.

Visa Requirements: This aspect assesses the ease of obtaining visas for travelers, considering the types of visas available and any specific provisions for them.

Transport Infrastructure: This aspect refers to the accessibility, convenience, and ease of travel within a given destination. This assessment considers the quality, efficiency, and variety of available transport options.

By considering these factors, the Access criteria provide valuable insights into the accessibility of a destination for Muslim travelers. It helps destinations identify areas of improvement to attract and cater to this market effectively.



Communication

The Communication criteria assess a destination's communication capabilities and efforts to market the destination to Muslim travelers. This criteria includes three key factors:

Communication Proficiency: This aspect evaluates the destination's proficiency in communicating in the top 10 languages Muslim travelers speak. These languages include English, Arabic, Bahasa, Melayu, Urdu, Turkish, Russian, French, Persian, and German.

Destination Marketing: This factor examines how the destination promotes Muslim-friendly services and facilities to attract Muslim travelers. It evaluates destination marketing efforts, including the availability of comprehensive and accurate information on websites, dedicated Halal travel guides, media mentions, and promotional campaigns that highlight the destination's Muslim-friendly offerings. Effective destination marketing is vital in attracting Muslim travelers and showcasing the destination's commitment to catering to their needs.

Stakeholder Awareness: This aspect assesses the level of understanding among stakeholders regarding the needs and preferences of Muslim travelers. It considers factors such as the Muslim population percentage in the destination, the presence of Halal conferences or events, online searches related to Halal and Muslim-friendly services, and the awareness of the local community about Halal requirements. Stakeholder awareness reflects the destination's ability to recognize and address the specific needs of Muslim travelers.

Considering these factors, the Communication criteria provide insights into a destination's communication capabilities, marketing strategies, and stakeholder awareness related to Muslim-friendly travel. As a result, these assessments help destinations enhance their communication efforts, improve marketing strategies, and promote understanding among stakeholders.

ACES Criteria Overview - Environment & Services



Environment

The Environment evaluates a destination's overall environment and atmosphere in relation to its appeal and suitability for Muslim travelers. This criteria consists of several key factors:

General Safety: This aspect evaluates the destination's safety in terms of hate crimes, and overall safety. It considers the level of safety and security for Muslim travelers, ensuring a peaceful environment where they can freely enjoy their visit without concerns for their well-being.

Faith Restrictions: This factor examines any restrictions or limitations imposed on Muslims in terms of religious practices, such as dress code restrictions for Muslim females. It evaluates the extent to which such restrictions may affect the overall experience and perception of the destination by Muslim travelers.

Enabling Climate: It looks at the ability of destinations to enable innovation and entrepreneurship, taking into account factors such as policy frameworks, access to finance, and innovative capacity that can contribute to creating a conducive environment for innovation and entrepreneurship in the climate change domain.

Muslim Visitor Arrivals: This factor looks at the number of Muslim visitors arriving at the destination. It takes into account the volume of Muslim travelers visiting the destination, which reflects the level of appeal and suitability of the environment for this specific group.

Sustainability: This dimension examines the destination's efforts towards sustainability, including factors such as CO2 emissions, renewable energy usage, air quality, heritage preservation, and human development. It recognizes the importance of sustainable practices in creating a favorable environment for Muslim travelers, aligning with their values and ethical considerations.

By taking into account these factors, the Environment criteria offer valuable insights into the overall environment and conditions of a destination as they relate to Muslim travelers.



Services

The Services criteria assesses the range and quality of services available to Muslim travelers in a destination. This criteria focuses on several key factors:

Availability of Prayer Places and Mosques: This aspect evaluates the presence and accessibility of prayer facilities and mosques within the destination. It considers the availability of designated prayer rooms, mosques, and other prayer spaces that cater to the needs of Muslim travelers, ensuring they have convenient locations to fulfill their religious obligations during their visit.

Availability of Halal Dining Options: This factor examines the availability of Halal dining options within the destination. It considers the presence of restaurants and food establishments that offer Halal-certified food or Muslim-friendly restaurants, accommodating the dietary requirements of Muslim travelers.

Muslim-Friendly Airports: This aspect evaluates the level of Muslim-friendliness of airports within the destination. It considers the availability of prayer rooms, ablution facilities and Halal food options in the airport.

Muslim-Friendly Accommodation: This factor assesses the availability of Muslim-friendly accommodation options. It considers the presence of hotels, resorts, and other lodging establishments that offer amenities and services tailored to the needs of Muslim travelers.

Heritage Experiences and Attractions: This dimension examines the availability of heritage experiences and attractions that are of significance to Muslim travelers. It considers historical sites, cultural landmarks, and attractions that showcase the destination's rich heritage and Islamic history, providing Muslim travelers with unique experiences and opportunities to connect with their faith and heritage.

By evaluating these factors, the Services criteria provide insights into the availability and quality of services that enhance the travel experience for Muslim travelers. It ensures that the destination offers suitable accommodations, prayer facilities, dining options, and opportunities for cultural exploration that cater to their specific needs.

138 Destinations ranked

The Global Muslim Travel Index (GMTI) has been expanding its coverage over the years to reflect the growing diversity in travel destinations. The index strives to be inclusive, with new destinations added and some removed to ensure a comprehensive view.

Due to the ongoing war in Ukraine, GMTI 2023 has paused the ranking of both Russia and Ukraine, just like in GMTI 2022. Therefore, the 2023 report only includes rankings for 138 destinations, which account for over 98% of Muslim visitor arrivals. This offers a comprehensive overview of the Muslim travel market.

The GMTI is dedicated to keeping up with the changing landscape of Muslim-friendly travel around the world. By covering a wide range of destinations, it provides useful information for travelers, destinations, and stakeholders on how to meet the needs of Muslim travelers and promote inclusivity in the travel industry.

AFRICA	ASIA	AMERICA	EUROPE	OCEANIA
Algeria	Azerbaijan	Argentina	Albania	Australia
Benin	Bahrain	Aruba	Andorra	New Zealand
Bostwana	Bangladesh	Bahamas	Armenia	Fiji
Burkina Faso	Brunei	Bolivia	Austria	
Cabo Verde	Cambodia	Brazil	Belgium	
Cameroon	China	Canada	Bosnia and Herzegovina	
Chad	Cyprus	Chile	Bulgaria	
Cote d'Ivoire	Georgia	Colombia	Croatia	
Egypt	Hong Kong	Costa Rica	Czech Republic	
Eswatini	India	Cuba	Denmark	
Ethiopia	Indonesia	Dominican Republic	Estonia	
Gambia	Iran	Ecuador	Finland	
Ghana	Japan	El Salvador	France	
Guinea-Bissau	Jordan	Guam	Germany	
Kenya	Kazakhstan	Guatemala	Greece	
Lesotho	Kuwait	Honduras	Hungary	
Malawi	Kyrgyzstan	Jamaica	Iceland	
Mali	Laos	Mexico	Ireland	
Mauritius	Lebanon	Nicaragua	Italy	
Morocco	Malaysia	Panama	Latvia	
Mozambique	Maldives	Paraguay	Lithuania	
Namibia	Mongolia	Peru	Luxembourg	
Nigeria	Nepal	Puerto Rico	Malta	
Rwanda	Oman	Suriname	Montenegro	
Senegal	Pakistan	United States	Netherlands	
Sierra Leone	Philippines	Uruguay	North Macedonia	
South Africa	Qatar		Norway	
Sudan	Saudi Arabia		Poland	
Tanzania	Singapore		Portugal	
Togo	South Korea		Romania	
Tunisia	Sri Lanka		Serbia	
Uganda	Taiwan		Slovak Republic	
Zambia	Tajikistan		Slovenia	
Zimbabwe	Thailand		Spain	
	Türkiye		Sweden	
	United Arab Emirates		Switzerland	
	Uzbekistan		United Kingdom	
	Vietnam			



07

GMTI 2023 Results



Decoding the Evolution: OIC vs Non-OIC Destinations in GMTI (2015-2023)

Overall GMTI ranking

Malaysia's Dominance: Malaysia's standing in the Global Muslim Travel Index (GMTI) has remained unchanged over the years, a testament to its enduring allure to Muslim travelers.

Indonesia's Challenge: Starting from the 6th position in 2015, Indonesia swiftly ascended the ranks, capturing the joint top spot with Malaysia in 2019. After briefly dipping in the rankings, it has reclaimed its joint number-one position this year, showcasing its formidable appeal to Muslim travelers while challenging Malaysia's hold on the top position.

The Dynamic Trio at the Top: Türkiye, the United Arab Emirates (UAE), and Saudi Arabia have ceaselessly vied for the next three spots, demonstrating their steadfast attractiveness to Muslim travelers.

Steadfast Destinations: Qatar, Oman, Jordan, and Singapore have shown remarkable resilience by maintaining a firm presence within the top 10. Their consistent rankings underline their effectiveness in catering to Muslim travelers.

Rising Destinations: Iran, Egypt and Uzbekistan, beginning from the 14th, 16th and 27th spots, respectively, in 2015, have made noteworthy strides up the ladder, reaching 7th, 9th and 13th positions by 2023.

Fresh Faces on the Block: Over the years, new entrants such as Pakistan, Algeria, and Kyrgyzstan have graced the top 20, indicating a broadening array of destinations capturing the interest of Muslim travelers.

The Ebb and Flow of Rankings: Several destinations have experienced significant shifts in their rankings over time, for instance, Bahrain, oscillating from 11th to 9th and back to 9th position.

Singapore's Singular Feat: As the only non-Organization of Islamic Cooperation (OIC) destination, Singapore has consistently clinched a spot within the top ranks of the GMTI, asserting its significant appeal within the global Muslim travel market.

Non-OIC Destinations GMTI ranking

Singapore's Stellar Consistency: As the consistent leader of non-OIC destinations from 2015 to 2023 in the GMTI, Singapore has demonstrated its unwavering appeal and unmatched prowess in catering to the needs of Muslim travelers.

Taiwan's Remarkable Ascent: Beginning at the tenth position in 2015, Taiwan has exhibited an impressive climb to the top 3. This rapid progression reveals its growing prominence and success in appealing to Muslim tourists.

United Kingdom's Steady Stature: The United Kingdom has consistently maintained a place in the top three throughout the years, showcasing its unwavering appeal to Muslim tourists.

Thailand's Resilient Presence: Thailand has managed to maintain its position within the top five, emphasizing its enduring appeal to the Muslim tourist demographic.

Spain's Consistent Climb: Spain's position has improved significantly over the years, moving from the ninth position in 2015 to sharing the seventh position in 2023. This steady upward progression shows Spain's interest in catering to Muslim travelers.

Dynamic Progress by Hong Kong, Japan, Germany, the Philippines, and South Africa: Hong Kong has maintained a steady presence around the fifth position throughout the years, demonstrating its consistent appeal to this demographic. Meanwhile, Japan has displayed an upward trajectory, moving from eleventh to sixth place from 2015 to 2023. Germany and the Philippines has also seen substantial advancement. Despite slight fluctuations, South Africa has remained resilient, consistently securing a place in the top ten, underscoring its continued attractiveness to Muslim travelers.

Fluctuating Ranks and Potential: Some destinations like the United States, France, and Australia have experienced notable fluctuations in their rankings. Yet, these variations indicate dynamic market forces and present opportunities for improvement.

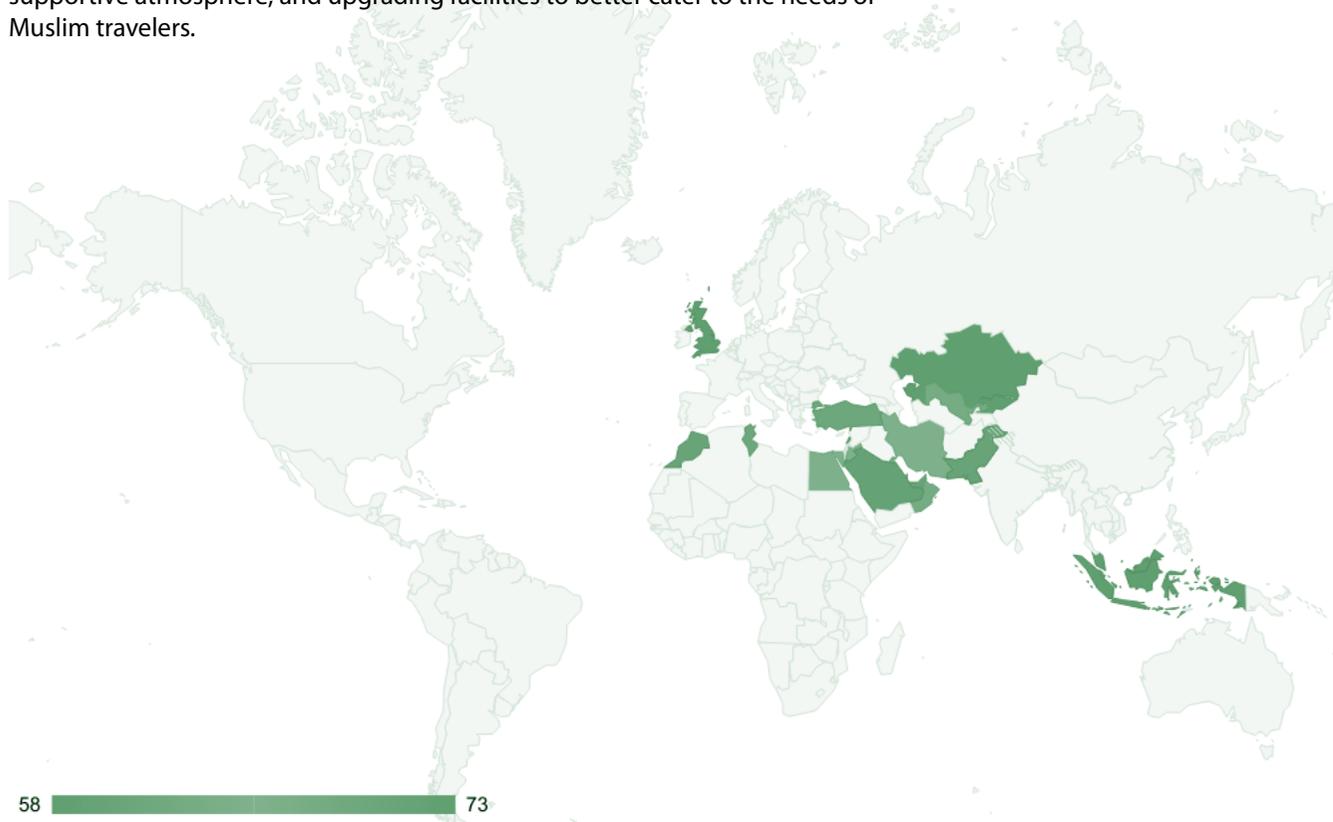
Emerging Non-OIC Destinations: Nations such as Georgia, Kenya, and Tanzania have demonstrated promising upward mobility over the years. Their improving ranks from the twenties to the teens suggest increased efforts in catering to Muslim travelers, making them potential contenders for higher ranks in the future.

GMTI 2023 Rankings - Top 20 Destinations

As the travel ban imposed due to the COVID-19 pandemic comes to an end, the global travel industry is making a strong comeback, exhibiting promising progress over the past year. The reopening of international tourism gates has instilled a considerable boost in travelers' confidence and freedom to explore, resulting in a notable surge in tourism activities.

Some destinations have capitalized on the opportunity by enhancing connectivity, implementing impactful marketing and promotion campaigns, fostering a supportive atmosphere, and upgrading facilities to better cater to the needs of Muslim travelers.

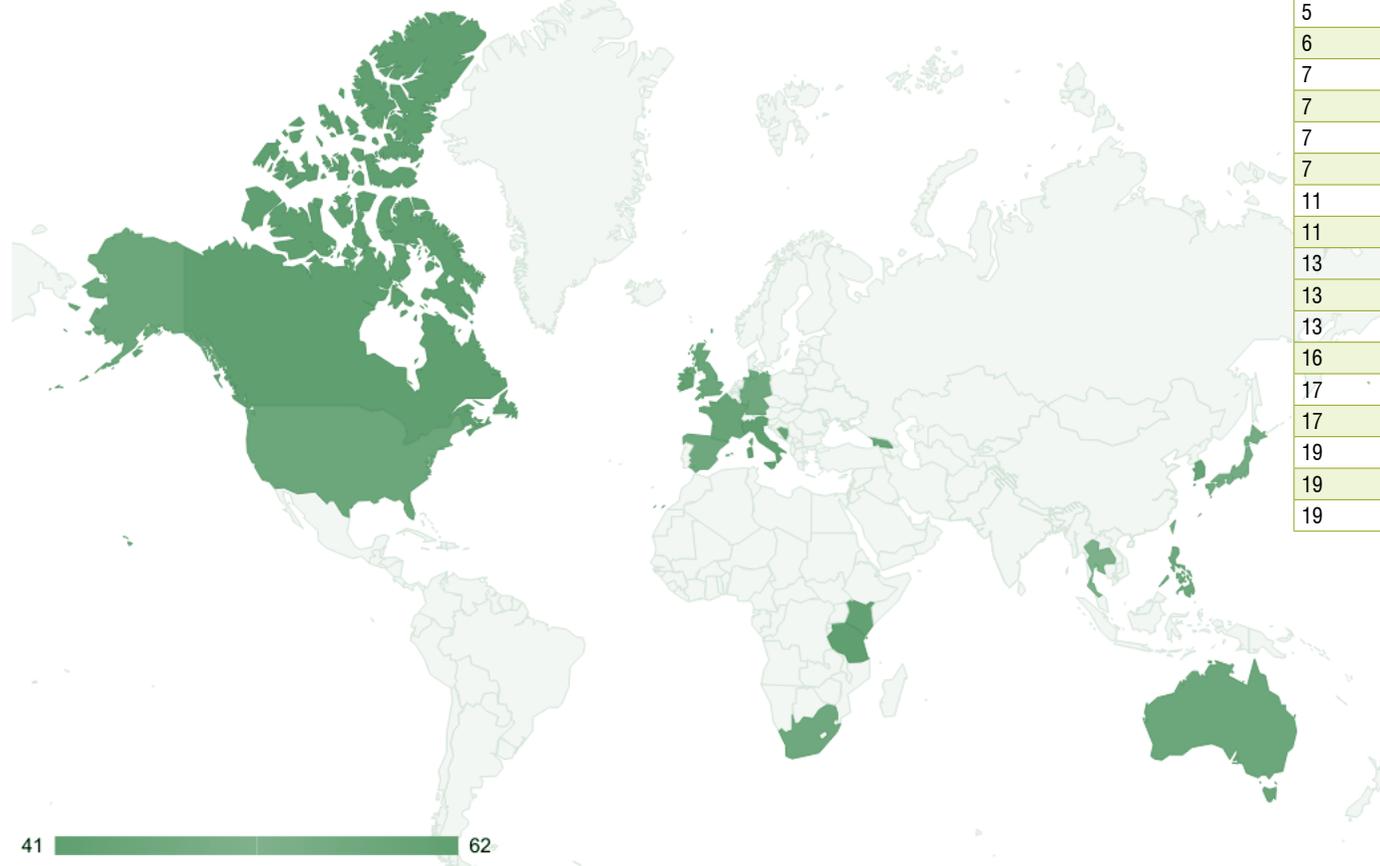
Indonesia and Malaysia jointly hold the prestigious top position in GMTI 2023. Indonesia has reclaimed its top position after previously jointly topping the rank in 2019, while Malaysia maintains its consistent status at the forefront of GMTI since its inception in 2015. The United Kingdom (UK) emerges in the top 20 ranking, impressively climbing eight positions from the previous year to secure the 20th spot on GMTI 2023. Singapore and The UK are the two non-OIC destinations featured in the top 20.



GMTI 2023 Rank	Change VS 2022	Destination	GMTI 2023 Scores
1	1	Indonesia	73
1	0	Malaysia	73
3	-1	Saudi Arabia	72
4	1	United Arab Emirates (UAE)	71
5	-3	Türkiye	70
6	0	Qatar	69
7	0	Iran	66
7	0	Jordan	66
9	0	Bahrain	65
9	3	Egypt	65
11	1	Kuwait	64
11	-2	Singapore	64
13	-1	Oman	63
13	-4	Uzbekistan	63
15	-3	Brunei	62
15	2	Tunisia	62
17	-5	Morocco	60
17	0	Pakistan	60
19	0	Lebanon	59
20	2	Kazakhstan	58
20	2	Kyrgyzstan	58
20	8	United Kingdom (UK)	58

GMTI 2023 Rankings - Top 20 non-OIC Destinations

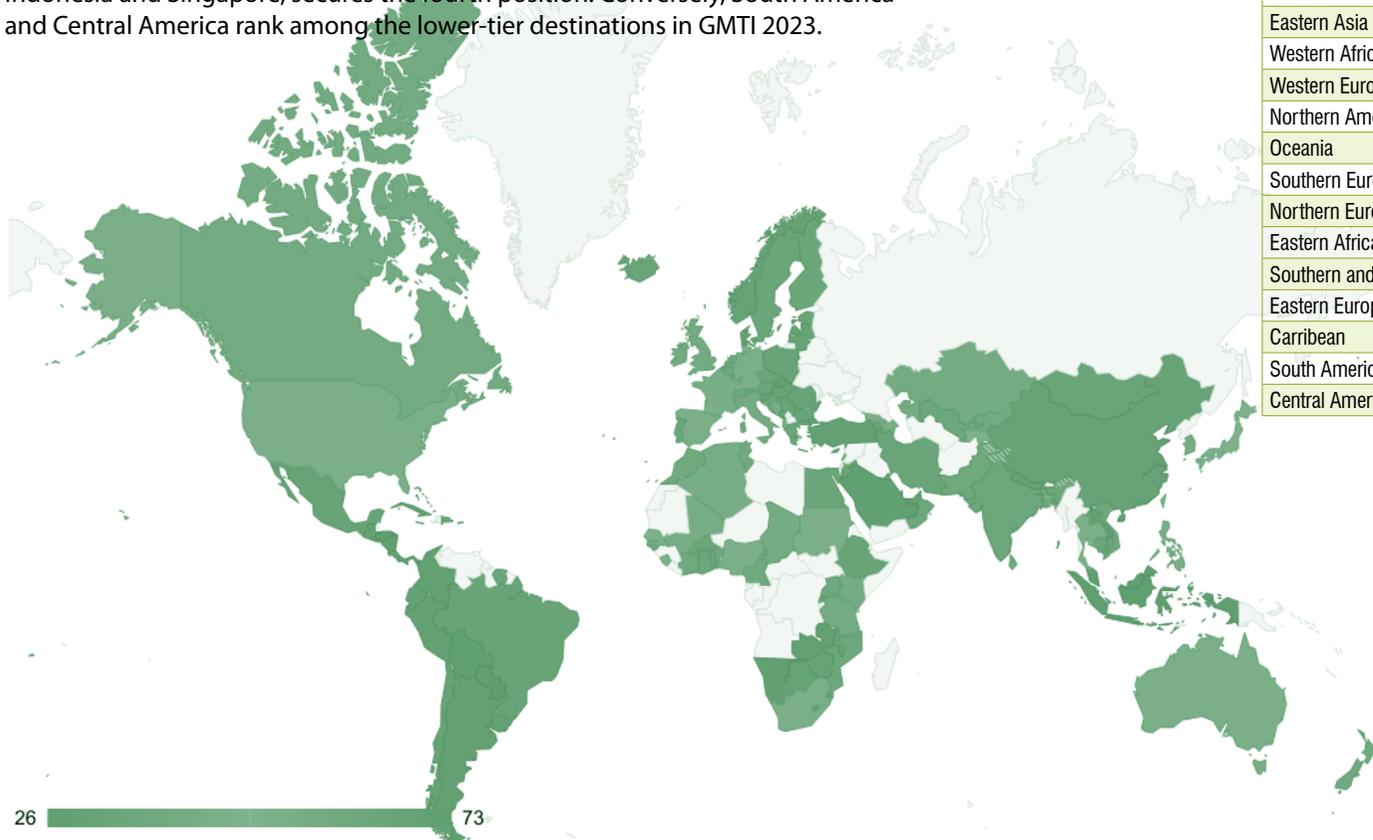
Singapore continues to hold its coveted position at the top among non-OIC destinations in GMTI 2023, demonstrating remarkable consistency since the index's inception in 2015. The United Kingdom (UK) has made strides, securing second place and surpassing Taiwan, now positioned third. Notably, Germany exhibits significant advancement this year, ascending by five positions and capturing the impressive 7th spot among the top non-OIC destinations in GMTI 2023. In addition, the Philippines has improved its position to rank at 7.



Non-OIC Rank	Change VS 2022	GMTI 2023 Rank	Destination	GMTI 2023 Scores
1	0	11	Singapore	64
2	1	20	United Kingdom (UK)	58
3	-1	28	Taiwan	53
4	-1	29	Thailand	52
5	0	30	Hong Kong	50
6	0	32	Japan	48
7	1	36	Philippines	46
7	5	36	Germany	46
7	-1	36	South Africa	46
7	3	36	Spain	46
11	-1	40	Australia	45
11	-3	40	United States of America (USA)	45
13	2	43	Bosnia and Herzegovina	44
13	-1	43	France	44
13	3	43	Georgia	44
16	3	47	South Korea	43
17	-5	49	Ireland	42
17	3	49	Kenya	42
19	2	52	Canada	41
19	-3	52	Italy	41
19	1	52	Tanzania	41

GMTI 2023 Rankings - Regional Analysis

West Asia and North Africa emerge as the top-ranked regions in GMTI 2023, predominantly owing to their composition of Muslim-majority destinations. Western Asia encompasses countries such as Türkiye and the GCC nations, while North Africa boasts Egypt and Morocco as its leading destinations. Central Asia, spearheaded by Uzbekistan and Kazakhstan, demonstrates continuous improvement in its score, showcasing its potential to ascend as a top region. Notably, Southeast Asia, home to the influential Halal travel destinations Malaysia, Indonesia and Singapore, secures the fourth position. Conversely, South America and Central America rank among the lower-tier destinations in GMTI 2023.



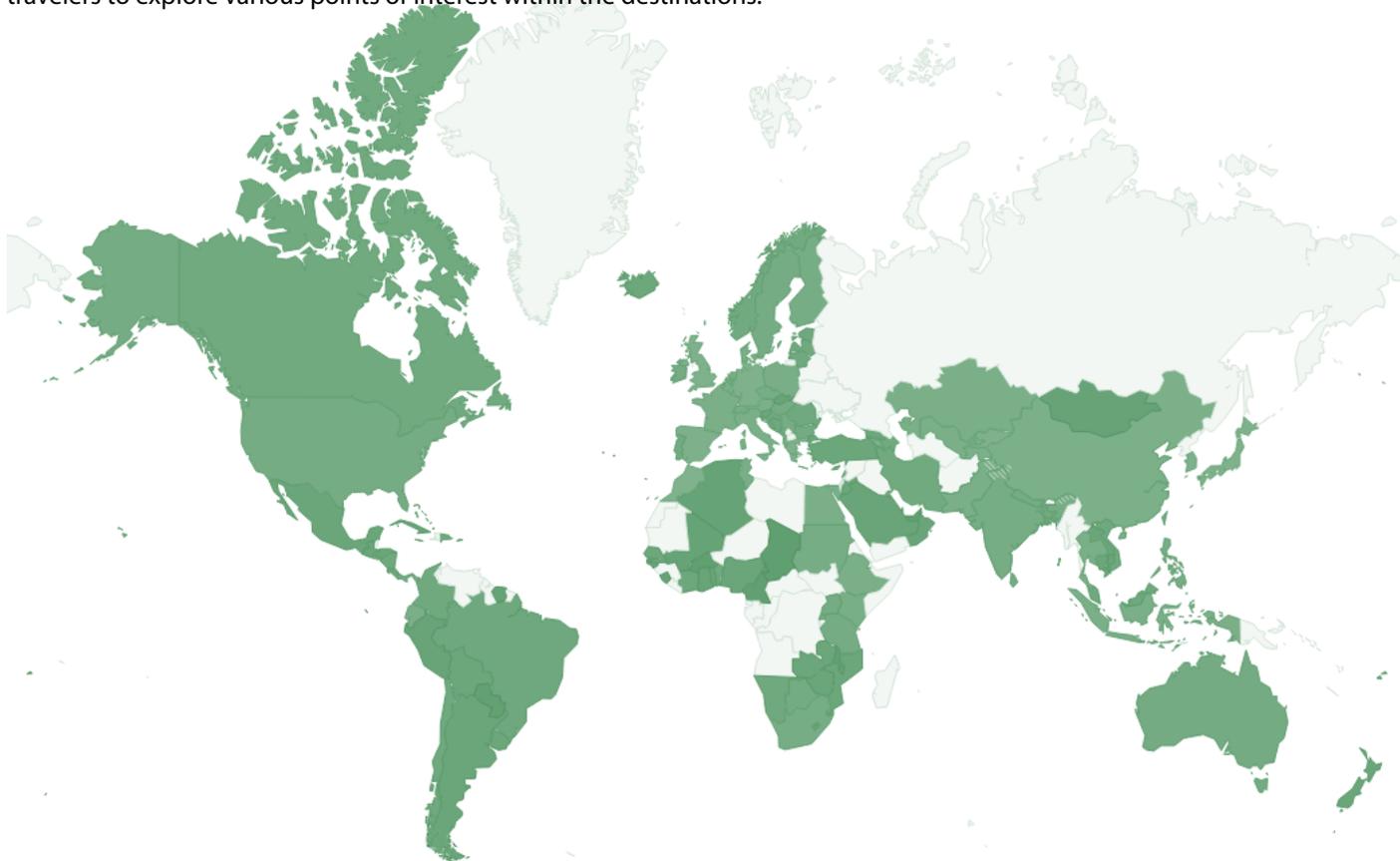
Region	Average GMTI 2023 Score	Top 2 Destinations
Western Asia	59	Saudi Arabia/United Arab Emirates (UAE)
Northern Africa	59	Egypt/Tunisia
Central Asia	57	Uzbekistan/Kazakhstan
South-Eastern Asia	52	Indonesia/Malaysia
Southern Asia	49	Iran/Pakistan
Eastern Asia	43	Taiwan/Hong Kong
Western Africa	40	Senegal/Sierra Leone
Western Europe	39	Germany/France
Northern America	39	United States of America (USA)/Canada
Oceania	39	Australia/New Zealand
Southern Europe	37	Spain/Albania
Northern Europe	36	United Kingdom (UK)/Ireland
Eastern Africa	36	Kenya/Tanzania
Southern and Central Africa	34	South Africa/Chad
Eastern Europe	32	Czechia/Bulgaria
Caribbean	32	Jamaica/Dominican Republic
South America	30	Suriname/Brazil
Central America	28	Guatemala/Costa Rica

GMTI 2023 ACES Rankings - Access

Access is a pivotal factor in facilitating tourism development, encompassing crucial elements such as air and land connectivity, visa requirements, and transport infrastructure at destinations.

The metrics of connectivity and visa requirements assess the ease of reaching and entering destinations from to the top 30 Muslim outbound markets. On the other hand, transport infrastructure gauges the convenience and comfort for travelers to explore various points of interest within the destinations.

Qatar, United Arab Emirates (UAE), and Saudi Arabia lead the rankings as the most accessible destinations for the top 30 Muslim outbound markets. This is primarily due to their strategic locations relative to these key markets and their status as significant airline hubs. Furthermore, these destinations are supported by excellent transportation facilities that enhance the ease of movement for Muslim travelers during their journeys.



Top 10 Access
Qatar
United Arab Emirates (UAE)
Saudi Arabia
Oman
Türkiye
Jordan
Georgia
Malaysia
Singapore
Iran

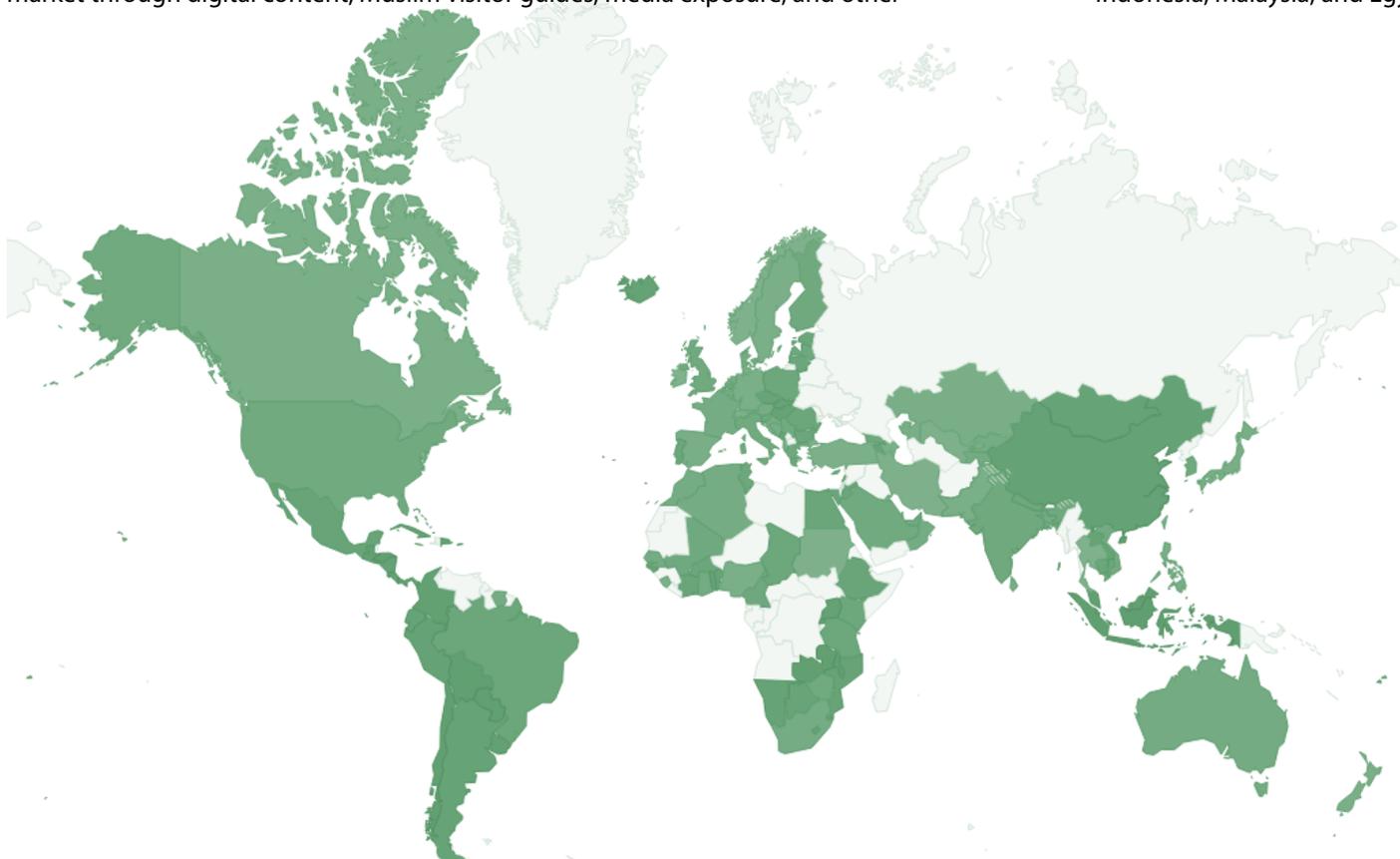
GMTI 2023 ACES Rankings - Communications

Effective communication and raising awareness among destination stakeholders play a crucial role in developing the necessary infrastructure and creating a welcoming environment for Muslim visitors. Hence, this category focuses on assessing destination marketing efforts targeting Muslim travelers and educating travel stakeholders within the destination.

The Destination Marketing aspect evaluates endeavors to engage the Muslim market through digital content, Muslim visitor guides, media exposure, and other

marketing initiatives. Stakeholder Awareness measures the level of awareness among stakeholders regarding the Muslim market, as well as the destination's efforts to enhance this awareness. This category also includes assessing "Communication Proficiency" based on the proficiency in the top 10 languages spoken by Muslim travelers, namely English, Arabic, Bahasa Melayu, Russian, Urdu, Bahasa Indonesia, Turkish, French, Persian, and German.

Indonesia, Malaysia, and Egypt emerge as the top three performers this year.



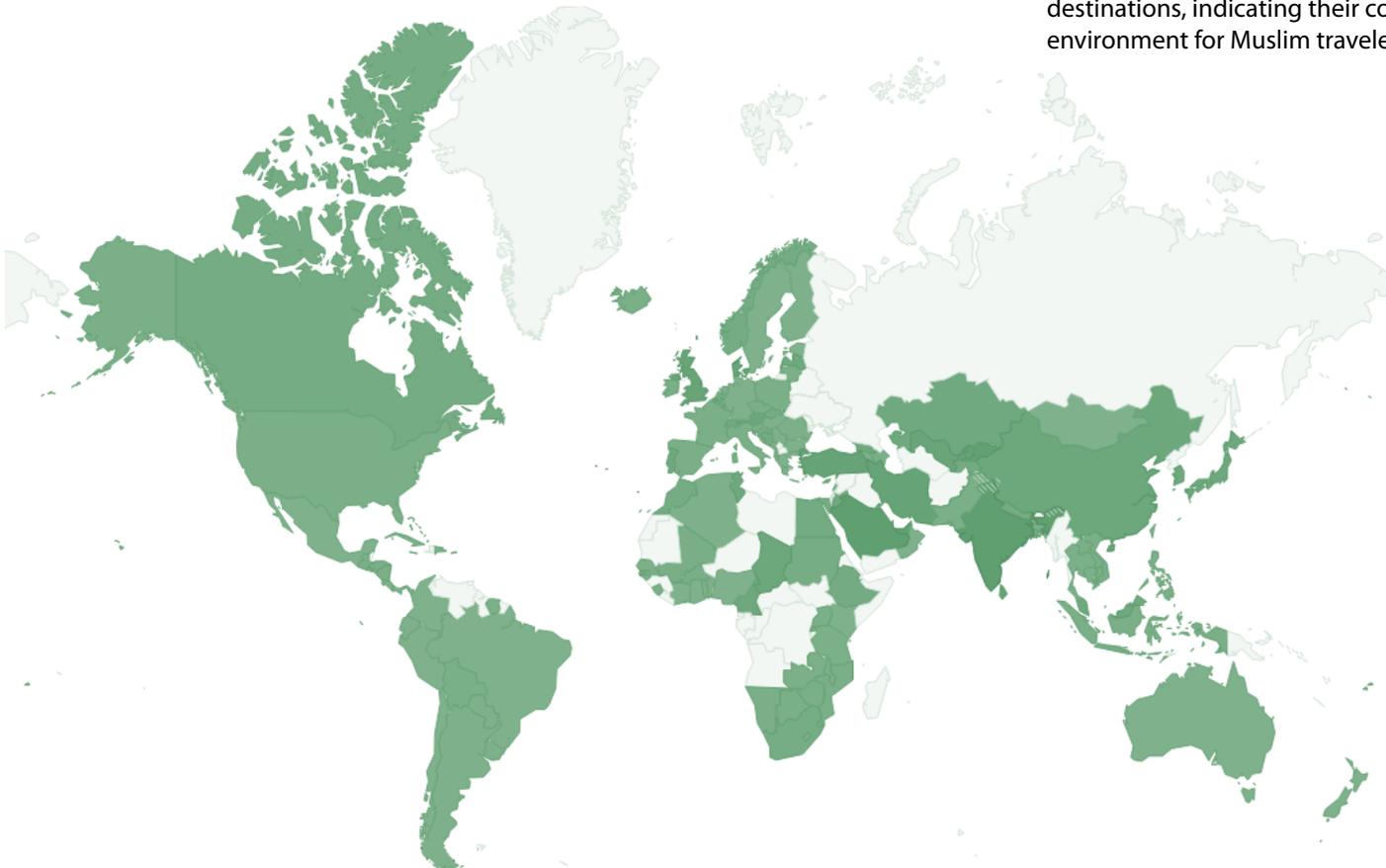
Top 10 Communications
Indonesia
Malaysia
Egypt
Jordan
Singapore
Tunisia
United Arab Emirates (UAE)
United Kingdom (UK)
Lebanon
United States of America (USA)

GMTI 2023 ACES Rankings - Environment

The Environment category assesses the level of comfort, safety, and convenience for Muslim travelers to practice their faith while on the go. This includes aspects like dress code restrictions and protection against hate crimes. Additionally, the Enabling Climate looks at the ability of destinations to enable innovation and entrepreneurship that will facilitate the growth of tourism facilities in the destination.

With an increasing emphasis on sustainable tourism practices, destinations are striving to preserve their natural and cultural heritage while minimizing any adverse effects, in order to attract travelers seeking responsible and ethical experiences. This year, GMTI sustainability calculations will focus on three key areas: Environmental, Socio-Cultural, and Socio-Economic aspects.

This year, Saudi Arabia and the United Arab Emirates have emerged as the top two destinations, indicating their commitment to providing a comfortable and safe environment for Muslim travelers.



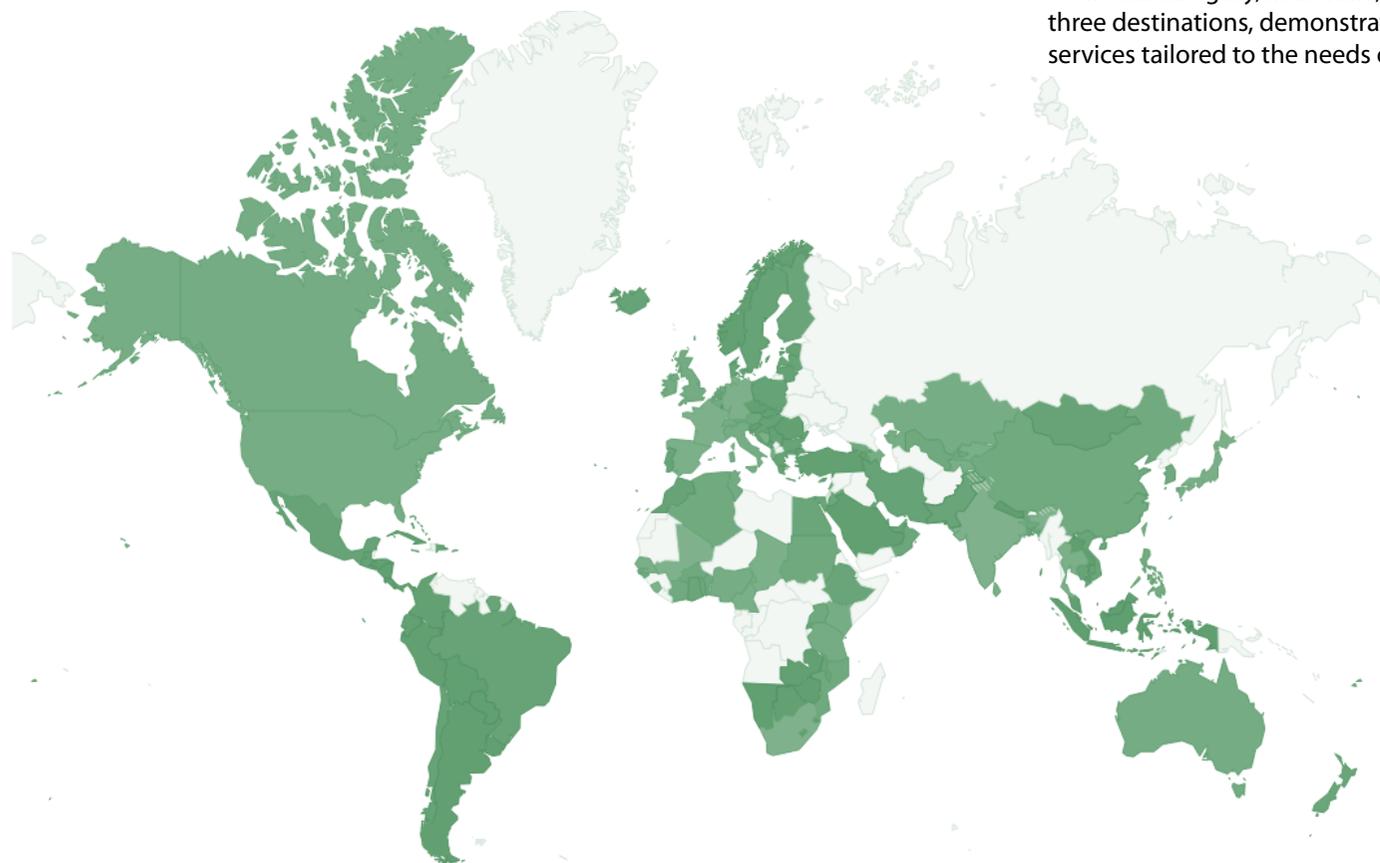
Top 10 Environment
Saudi Arabia
United Arab Emirates (UAE)
Kyrgyzstan
Türkiye
Iran
Bahrain
United Kingdom (UK)
Uzbekistan
Kuwait
Singapore

GMTI 2023 ACES Rankings - Services

Ensuring optimal service touchpoints is vital in warmly welcoming and retaining Muslim travelers in every destination. The services category assesses the presence of essential Muslim-friendly services and key touchpoints at the destination. It remains crucial to address the faith-based needs of Muslim travelers in significant touchpoints, including restaurants, hotels, and airports.

By offering halal dining options, convenient access to prayer places, Muslim-friendly accommodations, halal food and prayer places in airports, as well as captivating heritage and experiences, destinations not only fulfill the religious and cultural requirements of Muslim travelers but also elevate their overall travel experience, fostering a sense of hospitality and appreciation.

In this category, Indonesia, Malaysia, and Saudi Arabia stand out as the top three destinations, demonstrating their commitment to providing exceptional services tailored to the needs of Muslim travelers.



Top 10 Services
Indonesia
Türkiye
Malaysia
Saudi Arabia
Iran
United Arab Emirates (UAE)
Morocco
Qatar
Brunei
Pakistan

08

Key Touchpoints Analysis

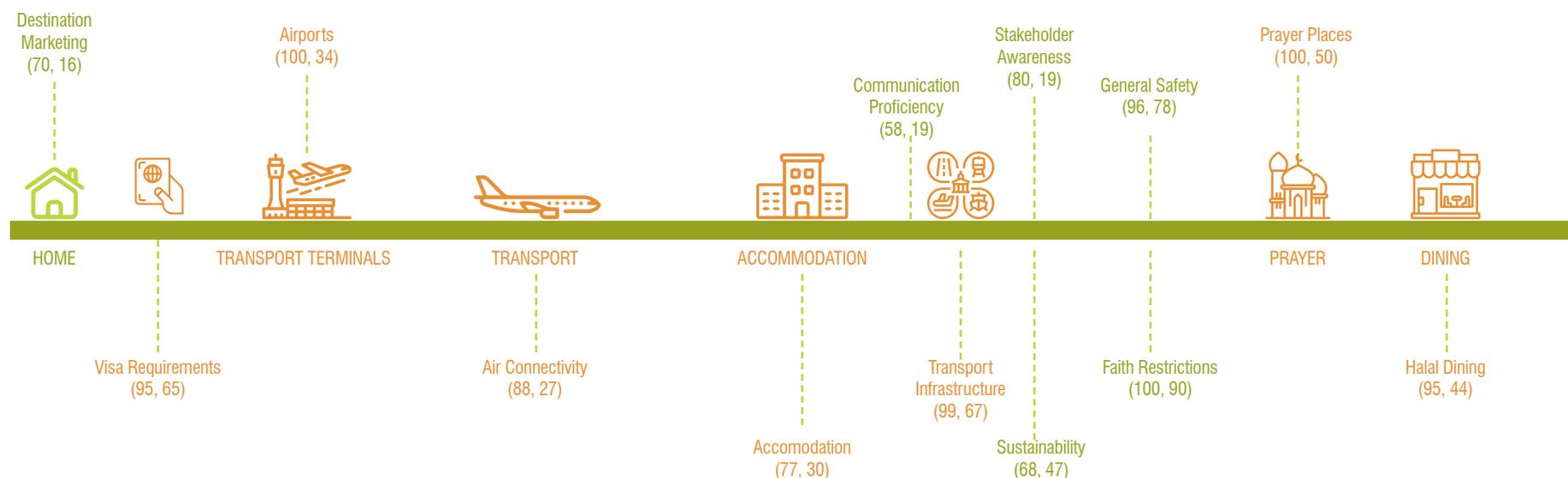


Key Touchpoints: Discovering Highlights and Opportunities

This touchpoint analysis aims to emphasize the highlights and opportunities at each of the hard and soft touchpoints in a Muslim traveler’s journey by looking at each touchpoint’s maximum and average GMTI 2023 scores.

Hard Touchpoints refer to tangible, concrete aspects of the travel experience that are essential for travel and have specific standards. They include Visa Requirements, Airports, Air Connectivity, Accommodation, Communication Proficiency, Transport Infrastructure, Prayer Places, and Halal Dining.

Soft Touchpoints relate to the less tangible, but no less important, aspects of travel that enhance the visitor experience, which is vital for a positive, inclusive, and respectful travel experience. These include General Safety, Faith Restrictions, Destination Marketing, Stakeholder Awareness, and Sustainability Initiatives.



*(max GMTI 2023 score, average GMTI 2023 score)

Key Touchpoints of a Muslim Traveler: An Analysis of the Hard Touchpoints



Visa Requirements for the Top Muslim Outbound Markets

The maximum score is quite high at 95, indicating that some destinations have effectively streamlined their visa requirements for the top Muslim outbound markets. The average score is at 65, showing that some destinations still have room for improvement in this area.



Airports' Muslim-friendliness

This aspect exhibits significant room for growth. Even though the maximum score is 100, suggesting that some airports have provided excellent services for Muslim travelers, the average score is just 34, revealing significant inconsistencies in Muslim-friendliness among different airports.



Air Connectivity to the Top Muslim Outbound Markets

The maximum score is decent at 88, but the average score is only 27, indicating a lack of strong air connectivity to key Muslim markets in many destinations.



Muslim-friendly Accommodation at the Destination

Although the highest score of 77 shows some destinations have achieved a reasonable level of Muslim-friendliness in their accommodation offerings, the average score of 30 suggests the majority is still not catering to this demand adequately.



Transport Infrastructure at the Destination

This aspect has the second-highest maximum score of 99, and a substantial average score of 67, indicating that many destinations provide good transport infrastructure.



Prayer Places at the Destinations

Despite a maximum score of 100, the average score is just at the halfway mark of 50, indicating significant room for improvement in the availability and accessibility of prayer places.



Halal Dining Options at the Destination

The maximum score is high at 95, but the average score is lower at 44, implying that many destinations need to improve their offerings of Halal food options.

Hard Touchpoints - Best Practices

AIRPORTS

Singapore Changi Airport

Singapore Changi Airport is renowned for its excellent Muslim-friendly facilities and services.

The airport provides dedicated prayer rooms equipped with necessary amenities, conveniently located throughout the terminals.

Moreover, the airport offers a diverse range of Halal-certified dining options, ensuring that Muslim visitors can enjoy delicious meals while adhering to their dietary preferences.

These thoughtful provisions create a welcoming and inclusive environment for Muslim travelers at Singapore Changi Airport.

ACCOMODATION

Shaza Hotels

Shaza Hotels shows the commitment to Muslim-friendly accommodation by focusing on four fundamental aspects.

Firstly, they provide a diverse range of Halal food options to cater to guests' dietary preferences. Secondly, the hotels maintain a Halal environment by abstaining from serving alcohol or featuring bars. Additionally, Shaza Hotels prioritize safety with separate family areas for added peace of mind. Moreover, they go above and beyond to offer facilities such as private swimming pools, designated prayer rooms, and tailored gym timings, catering to guests' cultural needs and practices.

The remarkable attention to detail in providing a wide range of Muslim-friendly facilities demonstrates Shaza Hotels' unwavering dedication to ensuring a seamless experience for Muslim travelers.

PRAYER PLACES

Taiwan

Taiwan, particularly Taipei, offers a Muslim-friendly environment with various prayer facilities for Muslim travelers.

Taipei Grand Mosque, located in the Da'an District, serves as the central hub for Islamic activities and offers spacious prayer halls for both men and women.

In addition to the mosque, several shopping malls, such as Taipei 101 and Miramar Entertainment Park, provide dedicated prayer rooms.

Moreover, many hotels in Taipei also offer prayer rooms or can arrange prayer spaces upon request.

By putting accessible prayer places in many strategic locations, Muslim travelers can comfortably fulfill their prayer while visiting Taiwan.

HALAL DINING

South Africa

South Africa prioritizes halal dining by offering a wide range of halal-certified restaurants and accommodations in cities like Johannesburg, Cape Town, and Durban.

Muslim travelers can enjoy diverse halal dining options, while grocery shopping and takeouts are convenient with reliable halal-certified products. The presence of Muslim-owned butchers ensures readily available halal meat.

The destination is also supported by a number of independent Halal Consultation and Certification Bodies.

Key Touchpoints of a Muslim Traveler: An Analysis of the Soft Touchpoints



Destination Marketing

For Muslim travelers, specifically, marketing that empathizes with their unique needs and expectations is essential. With the maximum score being 70, there is a significant opportunity for improvement, especially considering the average score across destinations is only 16. This suggests that while some destinations are doing well in marketing to Muslim travelers, many are under-performing and are not effectively communicating the amenities and services they offer that cater to Muslim travelers.



Communication Proficiency at the Destination

The maximum score is relatively low at 58, indicating room for significant improvement across destinations. The average score of 19 further underscores this point.



General Safety for Muslims at the Destination

This aspect performs relatively well compared to others, with a high maximum score of 96 and a strong average of 78, indicating a fairly consistent level of safety for Muslim travelers across destinations.



Faith Restrictions for Muslims at the Destination

This aspect is doing well, with the highest maximum score of 100 and an impressive average of 90. Higher scores here indicate only a few destinations have such restrictions, which is positive for Muslim travelers.



Stakeholder Awareness at the Destination

Despite the highest score being 80, the average score stands at just 19, showing a significant gap in awareness and understanding across many destinations. This implies a need for greater effort in education and communication about the Muslim traveler market's unique needs among stakeholders at each destination.



Sustainability Initiatives

With the highest score being 68 and an average score of 47, it seems that many destinations are recognizing the importance of sustainability and are making efforts to implement sustainable practices. However, with sustainability being such a critical factor in today's travel decisions, destinations should strive to exceed the current highest score. Destinations that focus on sustainable and eco-friendly initiatives may find themselves more attractive to the Muslim travel market, aligning with faith traditions of stewardship for the earth.

Soft Touchpoints - Best Practices

DESTINATION MARKETING

Malaga

Malaga's tourism authorities, in collaboration with HalalTrip, recently published a comprehensive halal travel guide, providing valuable information and recommendations for Muslim travelers.

This guide is a helpful resource, ensuring Muslim visitors can navigate and enjoy the city while adhering to their faith-based needs and preferences.

The guide was launched in the FITUR 2023. With these initiatives, Malaga demonstrates its commitment to welcoming and accommodating Muslim travelers.

It also worth noting that Singapore Tourism Board and New York City Tourism in collaboration with CrescentRating & HalalTrip also launched Halal Travel guides in 2021 and 2022 respectively.

STAKEHOLDER AWARENESS

Indonesia

In addition to the existing Muslim-friendly initiatives, Indonesia has taken further steps to enhance the Muslim-friendly situation.

The tourism authorities recently published mosque guides provide valuable information about prayer facilities across the destination.

Furthermore, the authorities have identified five super priority destinations, including Lombok and Lake Toba, where efforts are being intensified to develop Muslim-friendly infrastructure and services.

These efforts demonstrate Indonesia's commitment to creating a welcoming environment for Muslim travelers and promoting awareness among stakeholders about the needs of Muslim visitors.

SUSTAINABILITY INITIATIVES

Japan

Japan has implemented robust sustainable tourism initiatives to protect its natural environment and support local communities.

The destination focuses on reducing carbon emissions, promoting energy efficiency, and conserving resources. Initiatives include eco-friendly transportation systems, waste reduction programs, and sustainable accommodation options.

Japan also emphasizes cultural preservation, promoting traditional practices and supporting local artisans.

Through education and awareness campaigns, the destination encourages responsible tourism practices and aims to create a sustainable future for both visitors and the environment.



09

Muslim Women Friendly Destinations



Muslim Women Friendly Destinations

This year's Global Muslim Travel Index (GMTI) has a new addition: it now identifies the top Muslim Women Friendly destinations. This is to emphasize the significance of providing a travel environment that caters to Muslim women travelers' specific needs and preferences.

Muslim women make up a substantial portion of the global Muslim travel market and have specific needs and concerns. According to Mastercard-CrescentRating Muslim Women in Travel (MWIT) 2019 report, over 45% of Muslim travelers were women. It indicated that the Muslim women travelers exert considerable influence in trip planning regardless of the group setting they are in.

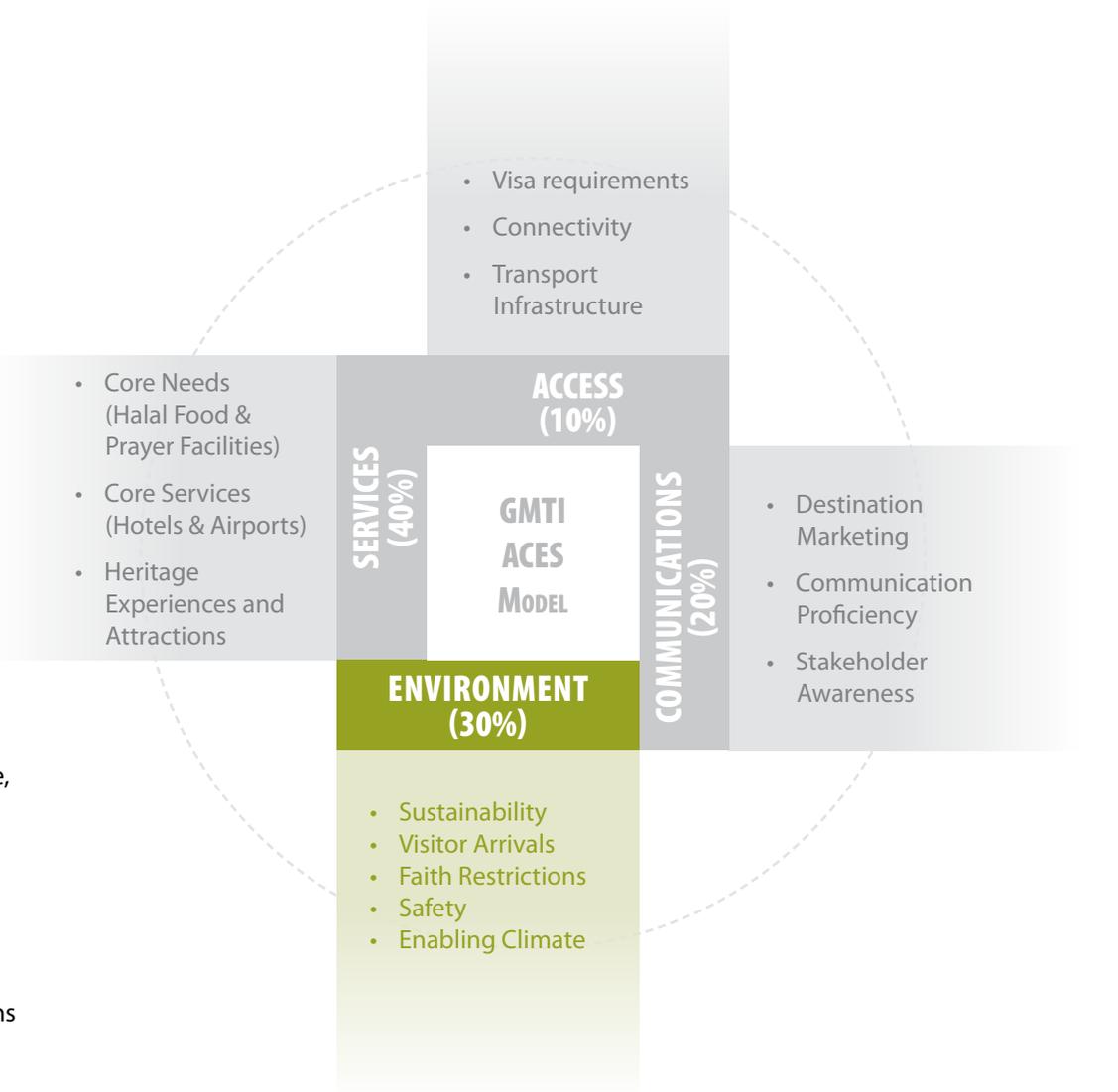
Muslim women travelers are most influential in making travel decisions when their journeys involve their family and spouse. In this environment - as daughters, mothers or spouses in the family - they display almost twice as much influence in trip planning compared to when traveling with others. Solo and women group travel was also a growth sector pre-COVID and this is expected to continue as travel restarts.

Therefore, the GMTI recognizes the significance of creating a Muslim Women Friendly destination category to ensure this group's hospitable and inclusive travel experience.

In determining the overall experience of Muslim women travelers, factors like, faith restrictions, general safety, sustainability, and other relevant indicators are considered within the Environment criteria of the ACES model.

Destinations can provide better services by taking into account the specific needs of Muslim women travelers. This includes ensuring safety and security, offering suitable prayer facilities, and accommodating cultural sensitivities.

In embracing the diversity and needs of Muslim women travelers, destinations have the opportunity to tap into a growing market segment and establish themselves as leaders in providing exceptional experiences for this valuable group of travelers.



Muslim Women Friendly Destinations - Top 10 non-OIC Destinations

Singapore leads the list of Muslim Women-friendly destinations in the non-OIC category.. Singapore’s position at the top demonstrates a good balance between Muslim-friendly environment, safety, sustainability, and a lack of faith-based restrictions.

Asian nations—Taiwan, Japan, South Korea, Hong Kong, and Vietnam—are prevalent in the top 10, signifying their robust understanding of the requirements of Muslim female travelers, coupled with high general safety and sustainability standards.

Meanwhile, Europe is well-represented by Portugal, Andorra, and the United Kingdom. Despite having relatively lower GMTI scores than their Asian counterparts, their strong commitment to sustainable tourism and high safety measures secured their spots. Finally, Mauritius, the sole representative of Africa, showcases the island’s environment, which accommodates Muslim practices and its significant safety standards.

It’s worth mentioning that countries like Japan, South Korea, and Portugal scored high in sustainability, indicating their commitment to responsible tourism. Lastly, despite a lower general safety score, the UK maintained its top 10 standing, bolstered by its high GMTI score. This analysis encapsulates how these non-OIC destinations have successfully fostered welcoming, safe, and respectful environments for Muslim women travelers.

In future editions of GMTI, the list will be expanded to cover the ranking of more destinations.

Rank	Destination	Score
1	Singapore	84
2	Taiwan	82
3	Japan	81
4	South Korea	79
5	Hong Kong	76
5	Mauritius	76
5	Portugal	76
8	Vietnam	75
8	Andorra	75
10	UK	74

Muslim Women Friendly Destinations - Top 10 OIC Destinations

Malaysia is leading the Muslim Women-friendly destination, underscoring its well-rounded appeal to Muslim women in terms of safety, no faith restrictions, and sustainable socio-economic practices. Following closely behind is Indonesia, which mirrors Malaysia’s score almost identically, signifying its comprehensive efforts to create a Muslim women-friendly environment.

Qatar ranks third, offering high general safety levels and no faith restrictions. Saudi Arabia and the United Arab Emirates (UAE) round out the top five, providing secure environments with complete faith compatibility.

Destinations such as Brunei, Kuwait, Bahrain, Oman, and Jordan highlight the range of choices available to Muslim women travelers within the OIC. Despite slightly lower overall scores than the top five, they offer strong safety and faith-based offerings.

This illustrates the evolving landscape of Muslim women traveling in the OIC destinations and the growing recognition of their distinct needs and preferences.

While each destination has its unique allure, they all have shown a comfortable, secure, and faith-friendly environment for Muslim women travelers. In addition, the high levels of general safety and absence of faith restrictions across the board indicate respect for and understanding of faith practices and culture, which is crucial in a Muslim-friendly destination.

Rank	Destination	Score
1	Malaysia	87
2	Indonesia	86
2	Qatar	86
4	Saudi Arabia	85
5	Brunei	84
5	Kuwait	84
5	UAE	84
8	Bahrain	82
8	Oman	82
10	Jordan	81

Understanding the Pain Points of Muslim Women Travelers

The P.A.I.N.S - Privacy, Amenities, Identity, Networks & Safety - model identified in the Mastercard-CrescentRating Muslim Women in Travel (MWIT) 2019 report pinpoint unique concerns that stakeholders should address.

Privacy/modesty is a considerable concern for Muslim women, leading them to avoid facilities that have dress code restrictions or do not provide adequate privacy.

MWIT further prefer amenities that take into account their needs, such as women-only prayer places, child-friendly services, etc.

In addition, the identity of being a Muslim woman brings with it a bias that MWITs possibly have to overcome in destinations or facilities.

On the part of networking, there exists a void in information that is available for MWIT to be able to connect with local communities that have shared interests.

Safety is another significant concern since identifying as a Muslim can attract hate crimes in some places.

MWIT P.A.I.N.S MODEL

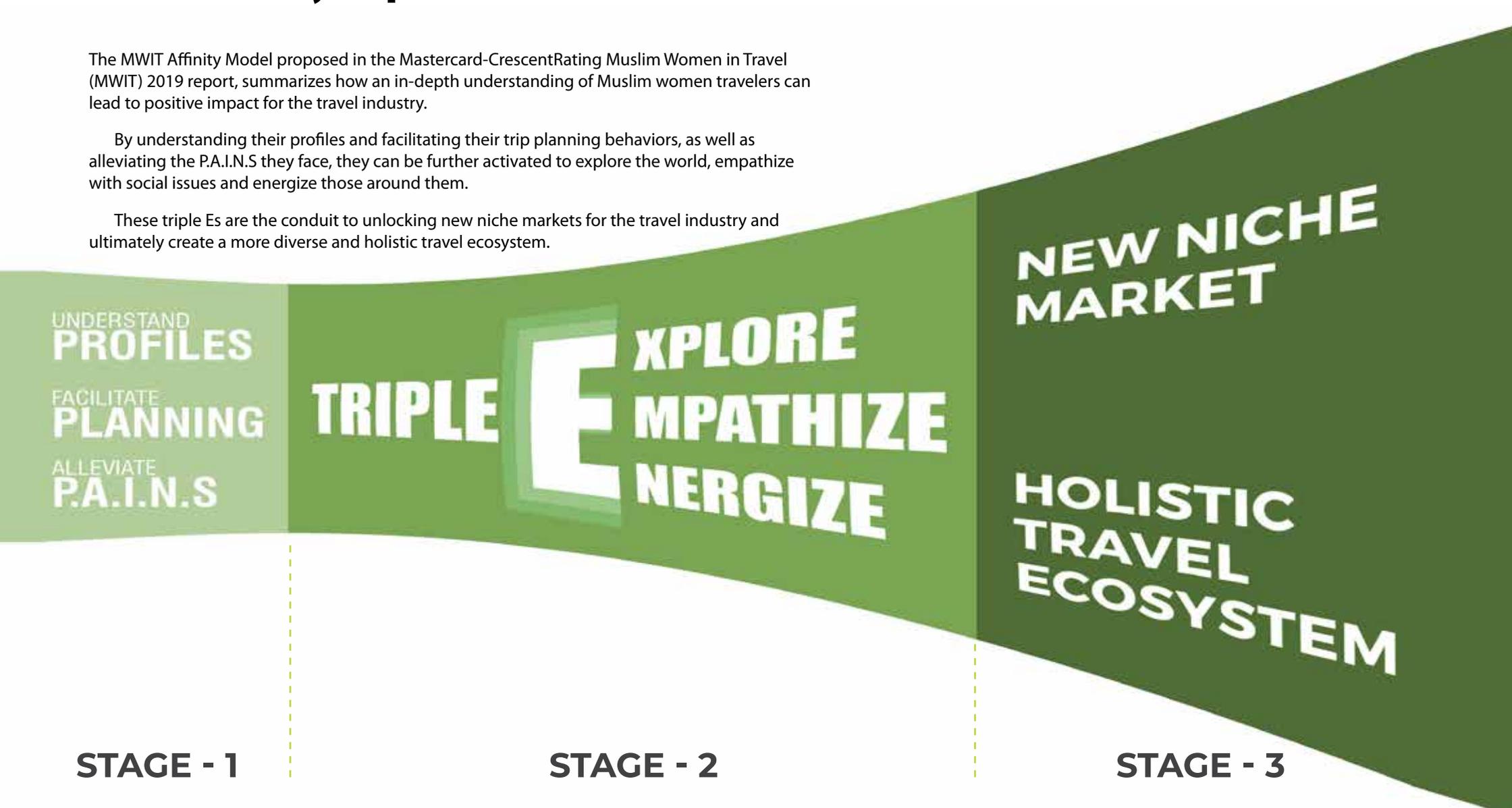


MWIT Affinity Impact Model

The MWIT Affinity Model proposed in the Mastercard-CrescentRating Muslim Women in Travel (MWIT) 2019 report, summarizes how an in-depth understanding of Muslim women travelers can lead to positive impact for the travel industry.

By understanding their profiles and facilitating their trip planning behaviors, as well as alleviating the P.A.I.N.S they face, they can be further activated to explore the world, empathize with social issues and energize those around them.

These triple Es are the conduit to unlocking new niche markets for the travel industry and ultimately create a more diverse and holistic travel ecosystem.



STAGE - 1

STAGE - 2

STAGE - 3



10

GMTI 2023 Performance Matrix

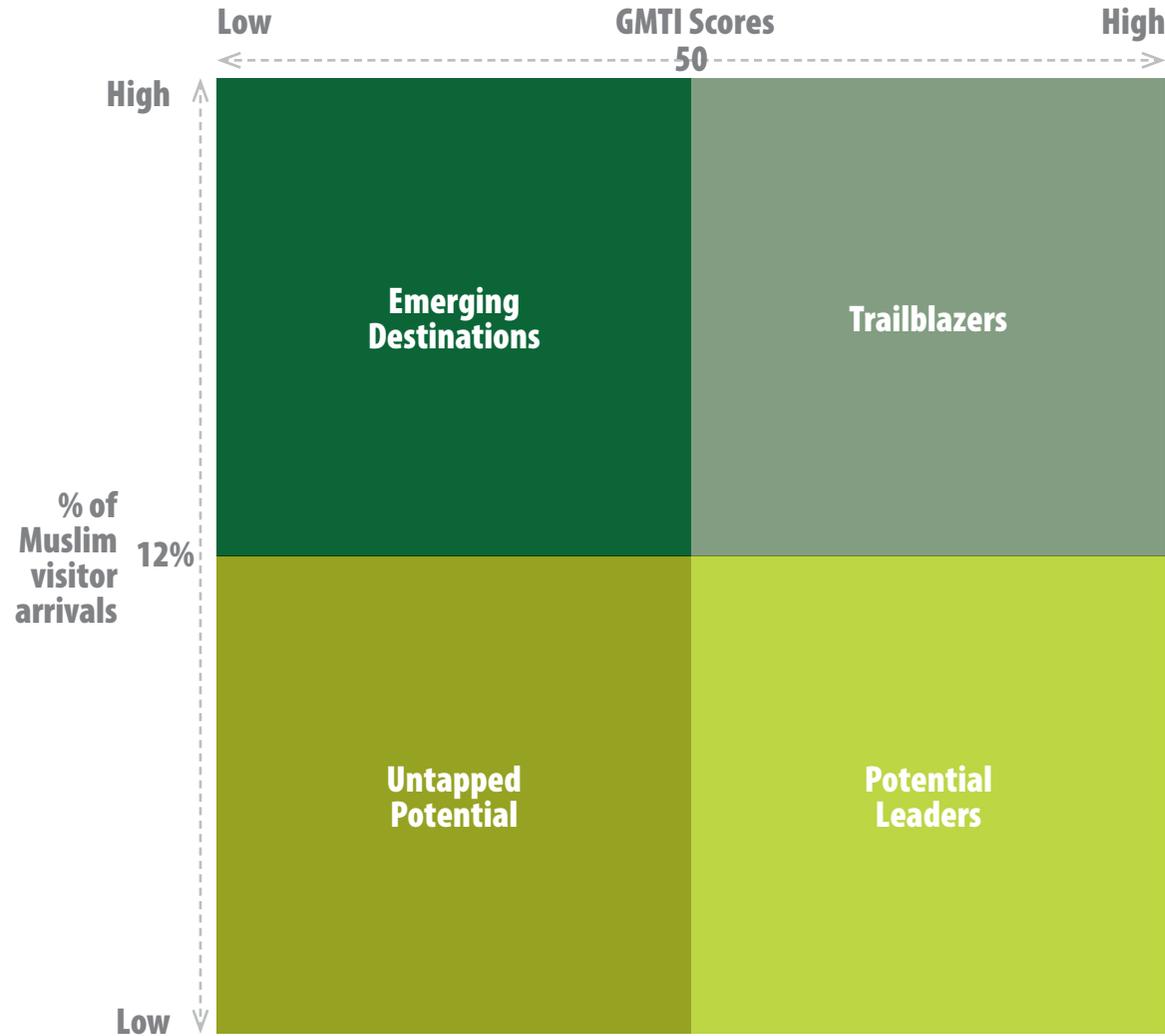


GMTI Performance Matrix (GPM)

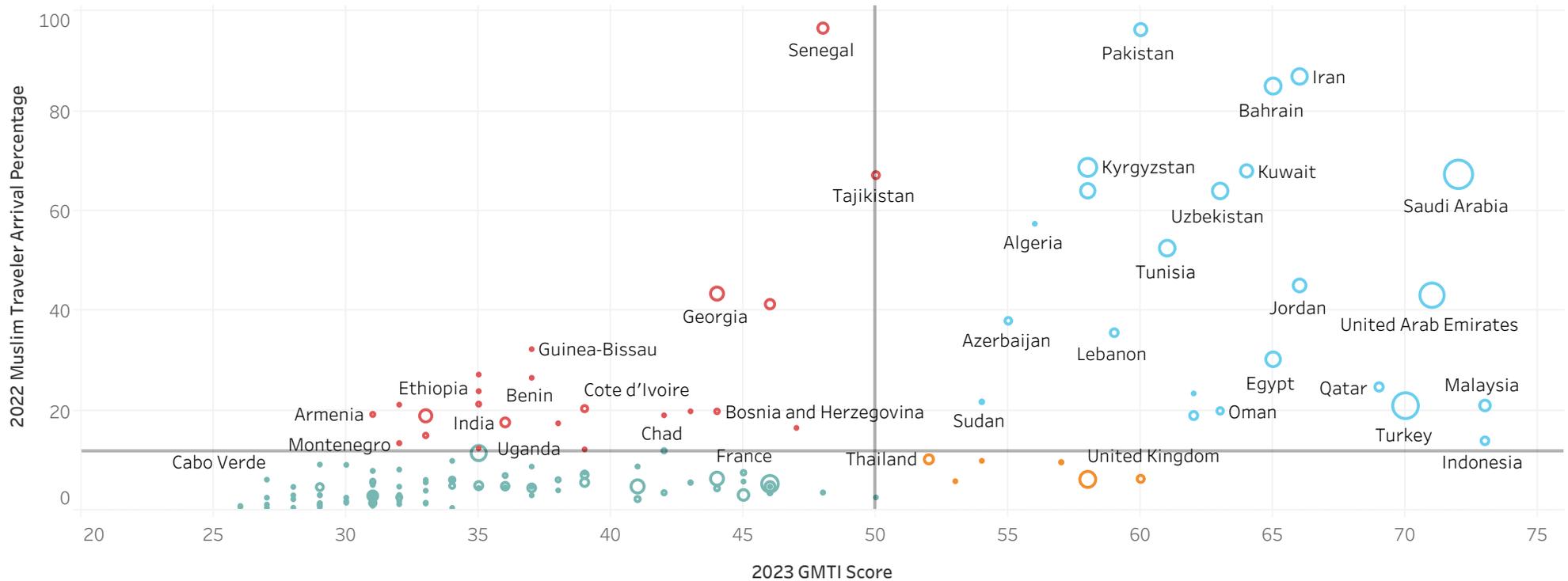
The GMTI Performance Matrix (GPM) is a strategic analytical tool designed to evaluate destinations' performance and potential in the Muslim travel market. By incorporating the Global Muslim Travel Index (GMTI) scores and the percentage of Muslim visitors to overall visitors, the GPM provides an overview of destinations' ability to cater to Muslim travelers and their success in attracting this growing market segment.

The GPM is divided into four quadrants, each representing a combination of GMTI scores and Muslim visitor ratios. This matrix enables destinations to identify their current positioning in the Muslim travel market and to develop targeted strategies for improvement and growth. The GPM also highlights best practices and areas of opportunity for countries at various stages of catering to the Muslim travel market.

The mid-point for the GMTI Scores axis is 50, indicating the average scores for GMTI. On the other hand, the mid-point of the percentage of Muslim visitor arrivals is 12%, indicating the global Muslim visitor arrivals average.



GMTI Performance Matrix (GPM) - 2023



*size of the circle indicates the total volume of Muslim arrivals.

The Trailblazers quadrant is home to 23 destinations that lead the way in catering to Muslim travelers. These destinations attracted 67 million Muslim arrivals, representing about 61% of total global Muslim arrivals in 2023. The Potential Leaders quadrant includes six destinations showing promise with their progressive offerings and services. These destinations welcomed approximately 4.5 million Muslim arrivals, making up 4% of global Muslim arrivals.

The Emerging Destination quadrant contains 23 destinations that are in the early stages of recognizing and addressing the needs of the Muslim traveler market. Despite being nascent in their journey, these destinations drew in around 15 million Muslim arrivals, accounting for 14% of total global Muslim arrivals. Lastly, the Untapped Opportunities quadrant comprises 85 destinations. Even though these destinations are under-utilized in terms of their potential to attract Muslim travelers, they still attracted around 25 million Muslim arrivals, representing approximately 23% of global Muslim arrivals.

GPM - Trailblazers

“Trailblazers” (GMTI scores above 50, more than 12% of Muslim arrivals): These destinations have high GMTI scores, indicating their strong commitment to Muslim-friendly services and facilities. Moreover, they also have a high percentage of Muslim arrivals compared to overall arrivals, suggesting that their efforts are well-received by the Muslim traveler community. They lead the way in catering to Muslim travel needs and serve as benchmarks for other destinations.

This year there are 23 destinations that are in this quadrant. Total Muslim arrivals to these destination was around 67 Million, representing around 61% of the total global Muslim arrivals.

They can be classified in 3 groups:

Saudi Arabia, Türkiye & UAE: Muslim arrivals not only represent high percentage, but the they also attract a high volume of Muslim arrivals.

Bahrain, Egypt, Iran, Kazakhstan, Kyrgyzstan, Kuwait, Pakistan, Tunisia, & Uzbekistan: They have lower volume of Muslim compared to the first group of destinations.

Algeria, Azerbaijan, Brunei, Indonesia, Jordan, Lebanon, Malaysia, Oman, Qatar, Singapore & Sudan: Although the share of Muslim arrivals to these destinations are high, the volume of Muslim arrivals are lower. These destination have a huge potential to grow the volume of Muslim arrivals.

Overall, for these destinations to maintain their position in this quadrant, they need to work on curating and enhancing their unique and meaningful services.



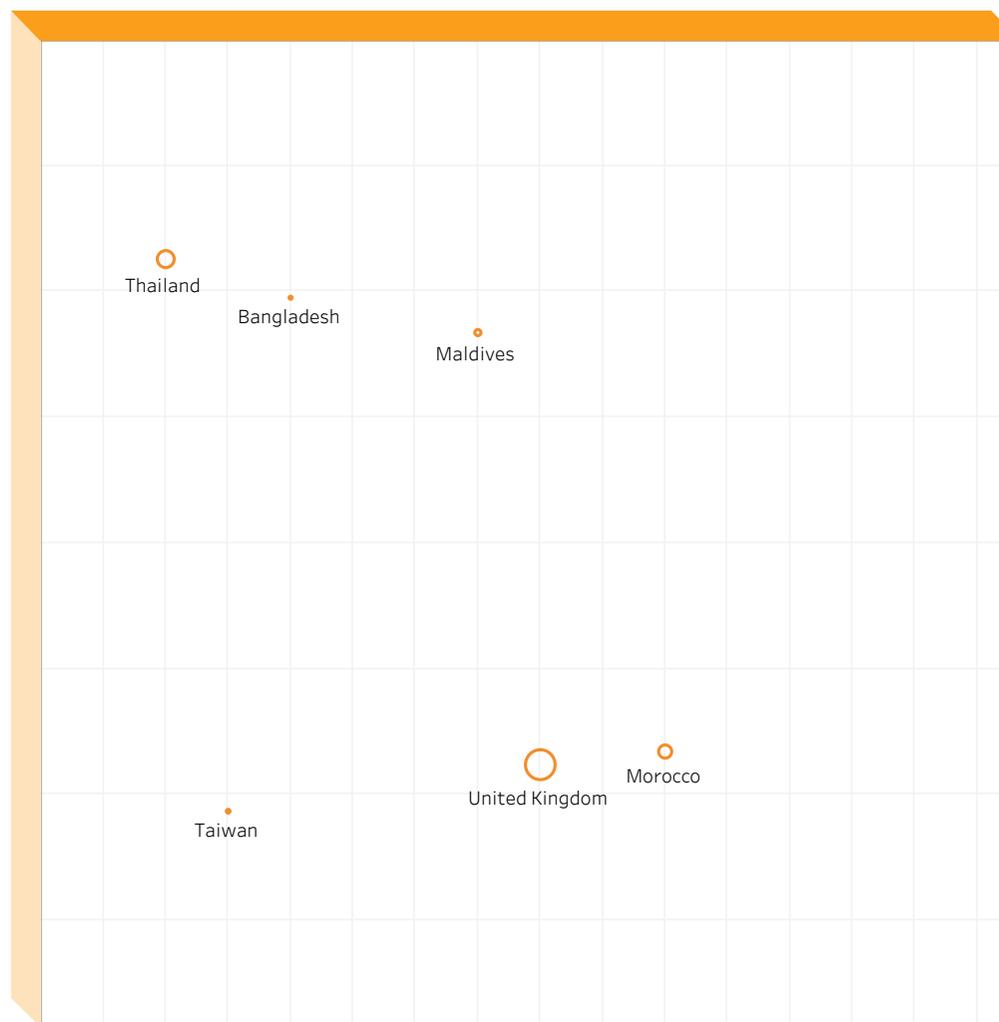
GPM - Potential Leaders

The “Potential Leaders” quadrant (GMTI above 50, less than 12% of Muslim arrivals) represents destinations with high GMTI scores but relatively low Muslim arrivals compared to overall arrivals. These destinations, including the UK, Thailand, Morocco, Maldives, Bangladesh, and Taiwan, collectively welcomed around 4.5 million Muslim travelers, accounting for 4% of global Muslim arrivals.

To fully leverage their potential, these destinations should focus on raising stakeholder awareness and enhancing destination marketing efforts. By promoting their Muslim-friendly services, such as halal food options, prayer facilities, and accommodations catering to specific needs, they can better attract and cater to the Muslim travel market. Collaborating with local stakeholders, including businesses, local communities and travel agencies is crucial for a cohesive approach in providing Muslim-friendly services.

Investing in destination marketing is also important to raise awareness among Muslim travelers. This can be achieved through social media campaigns, partnerships with influential Muslim travel bloggers, and participation in Muslim travel events. Showcasing sustainability initiatives, cultural preservation, and unique aspects of each destination can further appeal to Muslim travelers seeking responsible and authentic experiences.

By embracing these strategies and proactively engaging with the Muslim travel market, the Potential Leader destinations have the opportunity to transition to the “Trailblazer” quadrant.



GPM - Emerging Destinations

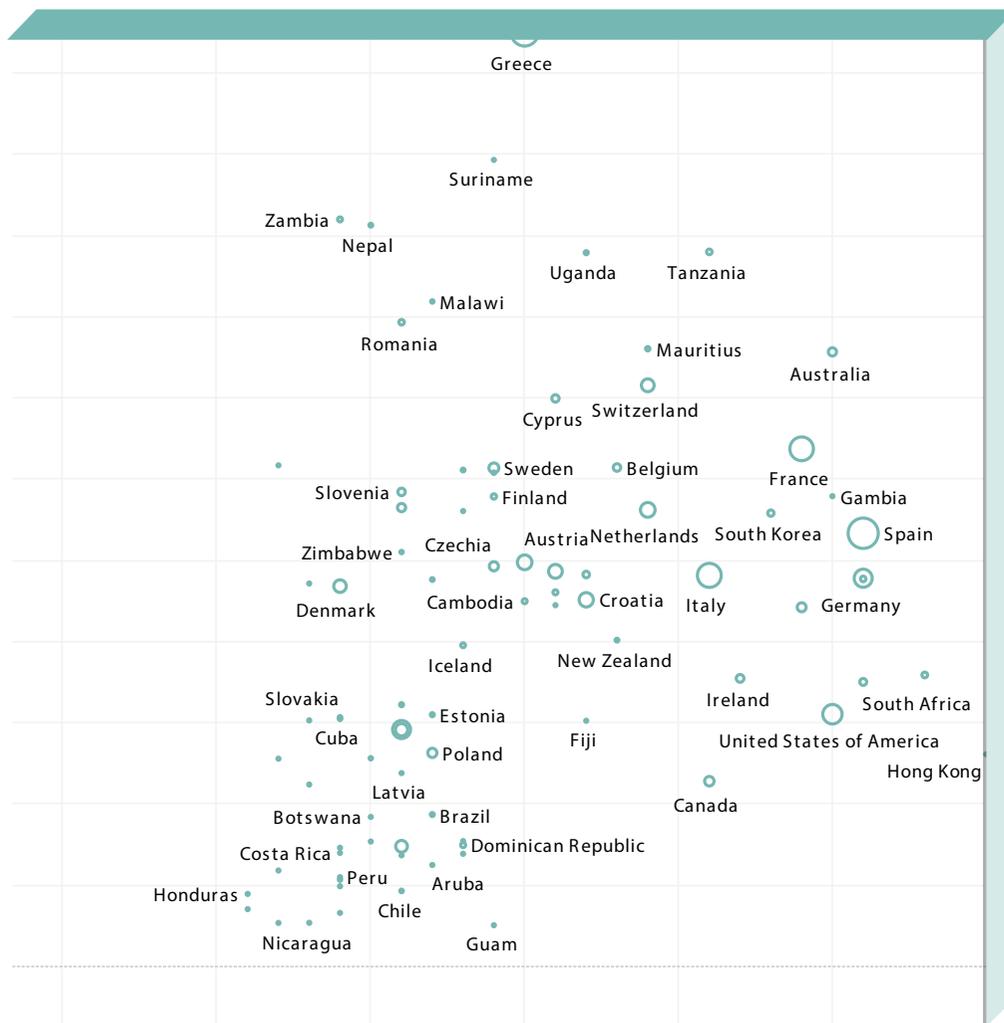


The “Emerging Destinations” quadrant (GMTI scores below 50, High % of Muslim arrivals) comprises destinations with a high percentage of Muslim arrivals but lower GMTI scores, indicating a need for improved Muslim-friendly services. Examples include Armenia, Benin, Bosnia and Herzegovina, Bulgaria, Burkina Faso, Cameroon, Chad, Cote d’Ivoire, Ethiopia, Georgia, Ghana, Guinea-Bissau, India, Nigeria, North Macedonia, Mali, Montenegro, Senegal, Serbia, Sierre Leone, Sri Lanka, Tajikistan, and Togo. These destinations welcomed around 15 million Muslim travelers, representing approximately 14% of global Muslim arrivals.

To enhance their appeal, these destinations can focus on developing halal travel products and services for families, offering diverse halal food options, dedicated prayer facilities, family-friendly accommodations, and cultural activities. Collaboration with local communities and stakeholders is crucial for successful implementation.

By investing in Muslim-friendly services and robust marketing campaigns, these destinations have the opportunity to attract a larger share of the Muslim travel market and establish themselves as destinations for authentic experiences.

GPM - Untapped Opportunities



The “Untapped Opportunities” quadrant (GMTI scores below 50, Muslim arrivals percentage below 12%) comprises destinations with low GMTI scores and a low percentage of Muslim arrivals. Despite this, they hold untapped potential. By enhancing Muslim-friendly services, facilities, and targeted marketing to the Muslim travel segment, these destinations can tap into the growing market and increase visitor numbers.

This year, there are 85 destinations in this quadrant. Total Muslim arrivals to these destinations reached around 25 million, representing approximately 23% of global Muslim arrivals.

Destinations categorized as “Untapped Opportunities” have the potential to attract more Muslim travelers by enhancing their Muslim-friendly services and implementing targeted marketing strategies.

By improving halal offerings such as dining, prayer facilities, and accommodations, these destinations can tap into the growing Muslim travel market. With strategic destination marketing campaigns highlighting their attractions and commitment to inclusivity, they can boost their visitor numbers and drive economic growth. Seizing these opportunities will position them as welcoming and desirable destinations for Muslim travelers.

11

GMTI 2023 Results Table



GMTI 2023 Results Table

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			Environment (30%)					Services (40%)				
	2023 Rank	2023 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	General Safety	Faith Restrictions	Sustainability	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage and Attractions	Hotel
Albania	43	44	17	78	62	15	18	47	24	92	67	46	7	60	70	33	10	27
Algeria	24	56	19	46	49	71	14	44	17	84	83	41	35	89	100	62	22	26
Andorra	103	31	3	55	82	13	11	4	55	92	100	49	3	20	28	0	10	23
Argentina	119	29	2	64	58	3	16	4	29	84	100	44	1	25	25	0	11	23
Armenia	103	31	56	74	58	24	4	0	27	83	100	42	14	30	28	0	10	5
Aruba	96	32	1	55	78	27	0	0	47	84	100	49	1	20	33	18	10	32
Australia	40	45	11	60	78	63	46	25	47	77	83	53	8	47	30	46	21	32
Austria	74	35	49	55	85	34	16	22	50	62	27	57	15	47	40	9	12	38
Azerbaijan	25	55	69	69	76	16	22	41	21	76	100	50	30	70	93	63	13	37
Bahamas	88	33	2	72	78	58	11	0	44	84	100	44	1	25	28	0	10	23
Bahrain	9	65	32	73	80	71	8	39	28	84	100	39	88	70	100	100	10	44
Bangladesh	26	54	33	56	58	11	13	43	20	84	100	33	6	85	100	89	10	38
Belgium	60	38	42	55	74	28	14	28	47	76	33	58	7	60	50	20	14	27
Benin	63	37	8	66	71	9	1	16	15	84	100	44	17	25	70	33	10	17
Bolivia	133	27	1	76	52	4	1	0	23	76	100	47	1	21	25	0	10	23
Bosnia and Herzegovina	43	44	21	71	46	15	27	34	29	72	67	47	15	55	80	32	14	34
Botswana	115	30	0	81	68	24	0	2	24	84	100	42	1	25	28	0	12	22
Brazil	96	32	6	70	60	2	26	12	33	69	100	58	2	34	25	4	23	23
Brunei	15	62	26	71	69	49	22	32	22	92	100	43	14	90	100	100	10	51
Bulgaria	88	33	30	55	63	9	16	14	40	67	67	51	39	29	30	18	14	25
Burkina Faso	74	35	4	50	44	9	0	32	15	76	100	36	16	25	70	33	10	17
Cabo Verde	133	27	1	76	57	1	1	2	26	84	100	44	4	15	25	0	10	22
Cambodia	74	35	4	70	56	13	23	5	21	84	100	47	4	25	28	39	10	18
Cameroon	60	38	15	42	48	34	1	12	15	76	67	43	11	40	93	33	10	24
Canada	52	41	22	45	78	59	28	31	51	62	67	50	6	47	50	37	21	28
Chad	49	42	15	47	36	21	0	24	24	76	67	31	11	40	70	93	10	32
Chile	103	31	2	62	76	4	3	2	34	84	100	48	1	50	25	0	10	24
China	103	31	50	50	88	1	13	4	55	44	33	68	10	30	28	19	59	29
Colombia	119	29	4	79	61	0	12	3	29	75	100	55	1	21	25	7	10	24
Costa Rica	119	29	2	65	65	5	11	0	29	92	100	50	1	17	25	0	10	23



GMTI 2023 Results Table

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			Environment (30%)					Services (40%)				
	2023 Rank	2023 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	General Safety	Faith Restrictions	Sustainability	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage and Attractions	Hotel
Cote d'Ivoire	55	39	7	62	63	15	1	17	18	84	100	46	19	40	60	33	10	22
Croatia	63	37	15	56	71	32	31	12	36	82	100	57	14	35	25	6	10	41
Cuba	119	29	5	50	69	4	13	0	30	84	100	54	2	27	25	0	10	23
Cyprus	69	36	18	55	68	32	12	17	46	82	100	51	7	40	48	0	10	23
Czechia	81	34	32	55	71	8	14	7	43	76	100	53	7	25	25	29	15	24
Denmark	119	29	28	55	84	37	15	18	56	41	33	56	12	35	30	9	10	23
Dominican Republic	88	33	3	69	69	1	13	0	23	84	100	46	2	25	25	33	10	23
Ecuador	103	31	1	93	69	18	1	0	20	84	100	51	1	22	25	11	10	23
Egypt	9	65	41	70	81	89	27	45	23	84	100	37	57	85	100	74	39	39
El Salvador	133	27	1	79	61	4	0	0	20	83	100	41	0	20	25	0	10	23
Estonia	96	32	10	55	70	29	11	1	50	78	77	56	3	19	25	28	10	23
Eswatini (formerly Swaziland)	129	28	0	65	57	18	1	0	19	84	100	43	3	25	30	0	10	15
Ethiopia	81	34	32	65	67	1	15	17	16	53	100	44	14	30	30	43	10	25
Fiji	63	37	1	67	54	19	17	12	21	85	100	46	2	35	48	30	10	17
Finland	81	34	19	55	84	31	15	11	57	74	67	56	5	25	25	33	10	23
France	43	44	55	55	85	26	14	28	55	49	50	61	35	55	50	46	52	37
Gambia	40	45	5	81	55	1	3	40	23	92	100	39	4	50	100	33	10	30
Georgia	43	44	64	89	73	19	14	15	28	74	100	49	57	35	50	33	10	26
Germany	36	46	51	55	77	29	24	28	57	62	67	56	21	55	50	53	48	35
Ghana	74	35	14	46	57	44	5	13	21	79	100	43	24	30	30	33	10	22
Greece	74	35	48	55	73	21	14	18	35	65	67	47	49	20	35	13	18	29
Guam	81	34	1	48	60	61	1	0	24	84	100	50	0	25	30	33	10	23
Guatemala	115	30	1	76	49	4	11	0	18	84	100	46	1	18	25	17	10	23
Guinea-Bissau	63	37	0	72	48	1	0	24	21	84	100	45	17	44	50	33	10	22
Honduras	137	26	1	73	53	4	0	0	17	84	100	44	1	20	25	0	10	0
Hong Kong	30	50	18	86	98	30	50	8	52	92	83	46	2	55	30	80	10	37
Hungary	103	31	28	55	71	8	14	5	40	57	100	50	20	20	28	20	10	23
Iceland	88	33	6	55	71	1	16	2	50	96	73	59	4	15	25	33	10	22
India	69	36	44	51	62	14	15	28	37	19	50	39	25	43	50	48	51	45
Indonesia	1	73	30	89	78	44	70	80	28	92	100	45	19	95	100	100	30	65

GMTI 2023 Results Table

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			Environment (30%)					Services (40%)				
	2023 Rank	2023 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	General Safety	Faith Restrictions	Sustainability	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage and Attractions	Hotel
Iran	7	66	65	73	76	28	21	44	33	76	100	47	84	85	100	93	48	35
Ireland	49	42	22	56	74	67	19	13	49	72	100	55	5	30	50	53	10	29
Italy	52	41	43	55	70	8	22	28	46	67	67	64	35	33	25	38	62	38
Jamaica	88	33	3	62	69	67	12	1	28	84	100	45	1	30	30	0	10	23
Japan	32	48	20	62	96	8	49	21	54	92	100	65	4	40	25	67	32	46
Jordan	7	66	75	83	72	95	22	41	27	84	100	42	56	80	100	81	27	38
Kazakhstan	20	58	50	87	61	26	17	35	25	84	83	45	76	81	90	60	16	30
Kenya	49	42	24	69	67	10	19	14	23	78	100	49	10	40	60	47	12	26
Kuwait	11	64	81	68	61	70	7	34	29	92	100	35	68	80	100	93	10	46
Kyrgyzstan	20	58	40	89	48	12	15	41	21	84	100	45	100	75	93	50	14	28
Laos	129	28	4	67	56	12	12	0	17	83	100	43	2	21	25	0	10	16
Latvia	103	31	18	55	70	36	11	1	37	82	43	52	2	25	28	27	10	23
Lebanon	19	59	34	78	48	91	15	33	25	68	100	42	32	70	100	93	10	34
Lesotho	133	27	0	68	40	17	0	0	22	84	100	39	2	15	28	0	10	22
Lithuania	96	32	11	55	73	26	11	1	37	85	100	50	4	25	28	9	10	23
Luxembourg	88	33	27	55	88	68	1	5	50	81	100	49	4	25	25	0	10	22
Malawi	96	32	0	61	46	1	1	12	23	84	100	45	5	40	50	0	10	22
Malaysia	1	73	52	95	77	66	54	66	39	92	100	44	33	95	100	100	10	77
Maldives	23	57	25	72	57	55	21	40	25	84	100	44	8	84	100	67	10	45
Mali	47	43	12	53	50	8	4	41	14	76	100	39	12	64	93	33	20	23
Malta	69	36	9	55	66	61	18	1	49	81	100	48	4	35	30	17	10	23
Mauritius	55	39	14	87	70	10	14	12	34	92	100	45	5	38	50	27	10	27
Mexico	103	31	7	58	61	6	15	8	31	75	100	51	9	30	25	0	32	23
Mongolia	88	33	7	59	50	1	15	4	28	92	100	45	3	30	50	0	10	21
Montenegro	96	32	12	68	58	1	12	16	30	84	100	49	10	30	30	0	10	22
Morocco	17	60	30	85	65	62	22	49	29	84	67	45	13	77	100	87	28	61
Mozambique	69	36	2	69	57	11	1	12	15	84	100	45	3	40	50	33	10	27
Namibia	129	28	3	67	71	9	12	0	21	84	100	41	1	15	28	0	10	22
Nepal	115	30	34	71	50	23	12	13	18	67	100	44	6	25	25	0	10	22
Netherlands	55	39	44	55	95	28	17	28	58	67	67	51	15	49	50	14	12	26

GMTI 2023 Results Table

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			Environment (30%)					Services (40%)				
	2023 Rank	2023 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	General Safety	Faith Restrictions	Sustainability	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage and Attractions	Hotel
New Zealand	60	38	4	51	72	65	40	11	47	70	83	57	3	52	25	17	10	24
Nicaragua	129	28	1	84	59	18	0	0	18	84	100	46	0	20	25	0	10	23
Nigeria	34	47	22	56	46	58	25	35	17	76	100	41	29	55	60	50	10	32
North Macedonia (formerly Macedonia)	74	35	11	62	56	1	11	24	29	82	83	46	16	40	50	13	10	17
Norway	103	31	18	55	74	60	17	20	49	62	60	59	7	25	30	0	10	23
Oman	13	63	82	76	79	71	20	41	27	84	100	42	19	80	100	100	10	47
Pakistan	17	60	43	62	63	51	20	47	23	76	100	27	22	90	100	93	23	36
Panama	119	29	3	75	76	7	2	2	26	84	100	47	1	25	25	0	10	23
Paraguay	137	26	1	60	46	4	2	0	23	84	100	51	0	20	25	0	10	10
Peru	119	29	1	63	56	4	12	1	29	84	100	49	1	24	25	0	12	24
Philippines	36	46	21	85	53	39	47	34	31	77	100	42	4	47	50	40	10	32
Poland	96	32	37	55	70	16	14	16	38	56	100	52	6	25	25	22	17	23
Portugal	69	36	13	55	80	17	14	12	42	89	100	64	13	30	25	20	16	29
Puerto Rico	115	30	1	44	80	31	13	1	37	84	100	49	2	25	28	0	10	23
Qatar	6	69	91	89	83	70	28	56	33	92	100	39	27	90	100	100	12	53
Romania	103	31	25	55	58	21	13	5	34	84	100	51	6	25	28	4	10	23
Rwanda	81	34	14	75	72	8	11	4	19	79	100	40	4	40	53	0	10	22
Saudi Arabia	3	72	88	69	80	66	16	55	33	84	100	43	99	95	100	100	17	64
Senegal	32	48	6	69	58	22	5	41	20	84	100	42	7	65	100	53	10	27
Serbia	88	33	20	75	64	32	12	15	32	79	100	47	12	35	25	0	10	10
Sierra Leone	34	47	3	71	44	57	1	32	20	84	100	41	10	60	80	60	10	24
Singapore	11	64	35	81	99	62	53	43	57	92	100	47	23	90	70	87	10	35
Slovakia	119	29	6	56	59	9	11	2	34	74	77	50	2	25	25	20	10	23
Slovenia	103	31	14	56	64	45	3	6	41	89	67	56	6	30	25	0	10	23
South Africa	36	46	13	78	68	20	28	18	30	64	100	38	5	60	60	67	15	34
South Korea	47	43	26	68	92	11	44	5	58	89	100	62	5	42	25	43	14	34
Spain	36	46	38	55	82	7	51	20	45	70	50	62	54	50	25	33	66	39
Sri Lanka	55	39	31	60	64	41	20	13	24	51	67	45	8	51	70	31	13	42
Sudan	26	54	36	55	66	63	2	40	10	76	100	39	15	90	100	60	10	41



GMTI 2023 Results Table

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			Environment (30%)					Services (40%)				
	2023 Rank	2023 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	General Safety	Faith Restrictions	Sustainability	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage and Attractions	Hotel
Suriname	81	34	0	65	48	58	2	12	27	84	100	43	2	24	25	33	10	32
Sweden	81	34	19	55	81	38	19	26	62	65	73	59	9	32	25	9	14	21
Switzerland	55	39	51	55	94	46	20	28	65	51	33	54	13	55	50	30	12	29
Taiwan	28	53	15	59	83	25	76	20	30	91	100	42	4	60	50	63	10	65
Tajikistan	30	50	26	82	62	20	4	40	19	84	33	44	48	70	95	60	12	34
Tanzania	52	41	22	68	67	18	11	16	19	83	100	46	7	60	60	17	12	33
Thailand	29	52	45	79	70	18	45	34	35	71	100	47	21	55	50	87	10	47
Togo	74	35	4	72	48	10	0	12	15	84	100	44	15	25	50	33	10	22
Tunisia	15	62	33	80	49	90	22	41	28	84	83	44	76	80	100	57	24	35
Türkiye	5	70	72	81	79	23	30	58	38	76	100	57	72	80	100	100	53	59
Uganda	63	37	15	67	67	3	4	12	16	84	100	44	6	25	50	53	10	20
United Arab Emirates (UAE)	4	71	93	77	90	84	21	40	42	84	100	43	85	80	100	100	10	67
United Kingdom (UK)	20	58	44	58	76	67	31	43	60	63	100	59	51	70	70	61	38	46
United States of America (USA)	40	45	22	44	86	64	50	25	62	43	100	51	23	55	35	37	31	30
Uruguay	119	29	0	58	70	14	1	0	29	92	100	50	1	19	28	0	10	23
Uzbekistan	13	63	44	80	71	21	32	53	25	84	100	39	82	75	90	80	27	34
Vietnam	63	37	14	60	66	34	24	5	34	92	100	46	5	30	28	26	10	31
Zambia	119	29	6	67	57	8	0	2	16	84	100	47	7	20	25	13	10	22
Zimbabwe	103	31	0	69	57	55	0	4	18	84	100	46	4	30	28	0	10	15



12

Technical Notes



Technical Notes and Methodology

Data collection and sources

The data used in the Global Muslim Travel Index (GMTI) is derived in several ways:

- Extensive research carried out by CrescentRating's dedicated team. They collate information from multiple sources.
- Data from CrescentRating's CR MAPS data platform.
- Data from CrescentRating and HalalTrip's existing studies.
- CrescentRating's data extraction models are employed to derive specific insights from the collected data.
- Small number of data sets based on trusted third-party indices. They include United Nations (UN), World Bank, United Nations World Tourism Organization (UNWTO), United Nations Educational, Scientific and Cultural Organization (UNESCO), World Economic Forum (WEF), Our World in Data, Vision of Humanity, Global Innovation Index, and IQ Air.

Data Utilization and Projections

GMTI primarily utilizes data from the current year, in this case, 2023. However, due to the unavailability of certain datasets, it is occasionally resorted to using data from the most recent previous years.

In instances where specific data for a destination is not available, a two-pronged approach is adopted to maintain the comprehensiveness and reliability of the index. Firstly, projections based on the destination's past data trends is used. This method leverages historical data patterns to estimate current figures, providing a calculated and informed estimate.

Alternatively, a similar destination's data is used as a proxy. This approach is employed when there are strong similarities in cultural, economic, or travel patterns between the two destinations, and one can reasonably represent the other.

Data Normalization Techniques

GMTI utilizes two primary normalization techniques to ensure that the data is comparable and standardized across diverse variables: Clipping Normalization and Linear Normalization.

Clipping Normalization is a technique where a maximum (and possibly minimum) value for a data set is defined, and these defined maxima and minima are assigned to any outlier data points that fall beyond these set boundaries. This method is used when dealing with data that contains extreme values or outliers that might distort the overall analysis. By 'clipping' these outliers to a predetermined maximum or minimum, it is ensured that they don't disproportionately influence the results.

Linear Normalization, on the other hand, transforms all data points to fall within a predefined range. This process maintains the original distribution of the data while ensuring all values are within a comparable range. This normalization technique is particularly used when combining data of different units, scales, or magnitudes, as it brings them all to a uniform scale without losing their original relational differences.

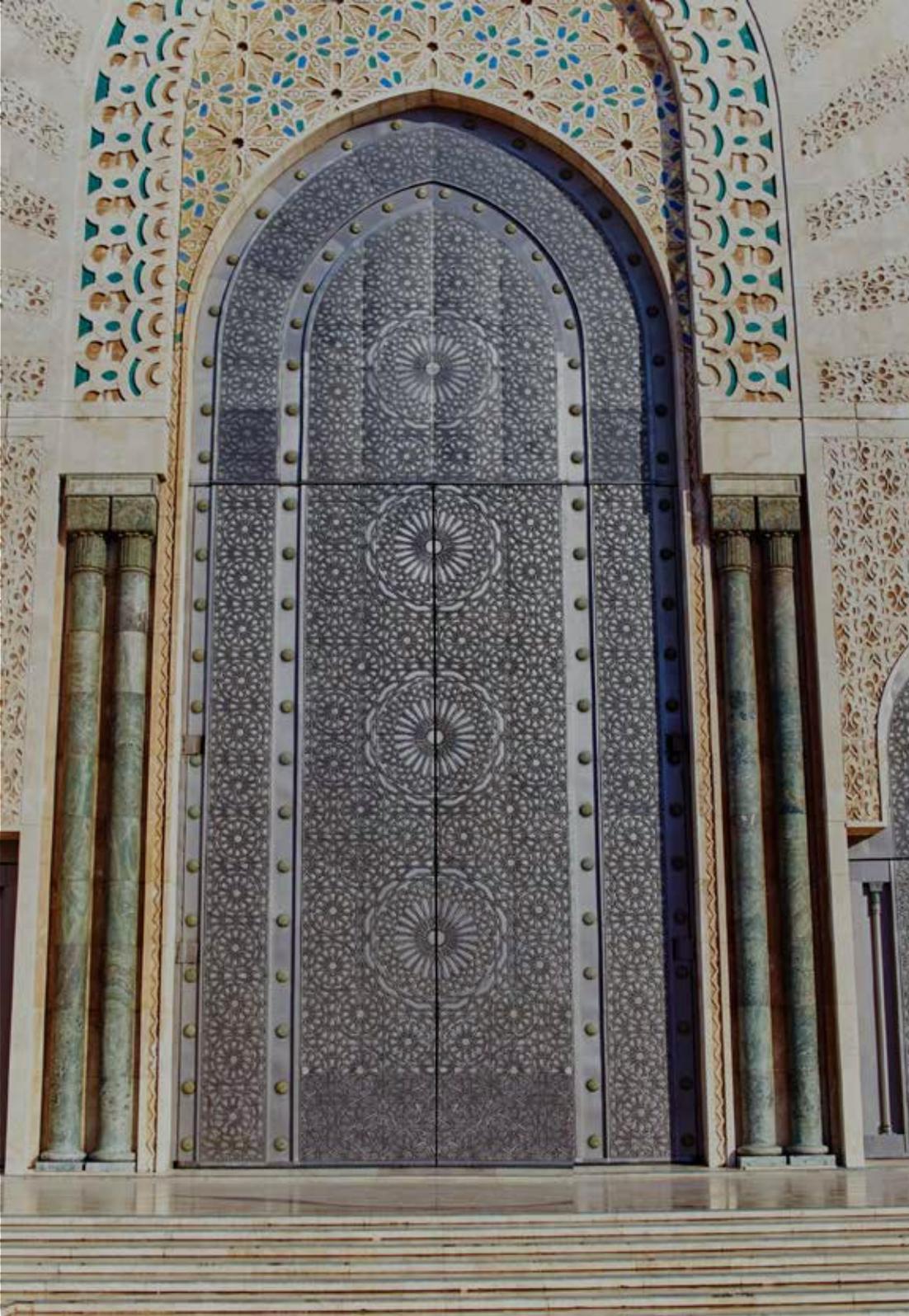
Calculating GMTI Scores

The calculation of scores for each destination follows a three-step process that is embedded within the ACES Framework.

The Two-Tiered Approach: Each of the four main categories - Access, Communication, Environment, and Services, comprises two distinct tiers of data. This structured approach ensures that every critical aspect within each category is duly considered.

Weighted Average Calculations for Subcategories: The individual scores for each subcategory are computed based on a weighted average of the number of data sets contained within that subcategory. This process ensures that each element within the subcategory influences the final score, in proportion to its relevance and importance.

Overall GMTI Score Determination: The comprehensive score for each destination, is determined by calculating the weighted average of the four main categories. This final score offers a robust and fair representation of the destination's Muslim-friendliness based on access, communication, environment, and services.



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CrescentRating is the world's leading authority on Halal-friendly travel. The company's vision is to lead, innovate and drive this segment through practical and deliverable solutions in what is regarded today as one of the fastest growing segments in the tourism sector.

The company uses insight, industry intelligence, lifestyle, behavior and research on the needs of the Muslim traveler to deliver authoritative guidance on all aspects of Halal-friendly travel to organizations across the globe.

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Mastercard-CrescentRating GMTI Awards

- Top Destination of The Year (OIC)
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- Emerging Destination of The Year (OIC)
- Emerging Destination of The Year (non-OIC)
- Inclusive Destination of The Year (non-OIC)
- Most Accessible Destination of The Year (by Air)
- Sustainable Destination of The Year
- Destination Marketing & Stakeholder Awareness of The Year

Muslim-friendly Service Provider Awards

- Muslim-friendly Hotel Chain of The Year
- Muslim-friendly Hotel of The Year
- Muslim-friendly Beach Resort of The Year
- Muslim-friendly Convention & Exhibition Centre of The Year
- Muslim-friendly Airport of The Year
- Muslim-friendly Cruise Line of The Year
- Muslim-friendly Attraction of The Year
- Muslim-friendly Tour Operator of The Year
- Muslim-friendly Restaurant Chain of The Year
- Muslim-friendly Airline of The Year
- Travel Takaful Provider of The Year
- Muslim-friendly Game Reserve/National Park of the Year

Halal Travel Personalities of the Year

- Halal Travel Personality of The Year
- Halal Travel Influencer of The Year
- Halal Travel Tour Guide of The Year
- Special Recognition Award

HalalTrip Travelers Choice Awards

- Most Promising Muslim-friendly City Destination of The Year (OIC)
- Most Promising Muslim-friendly City Destination of The Year (Non-OIC)
- Islamic Heritage Destination of The Year
- Halal Travel Marketing Campaign of The Year
- Muslim Women-friendly Destination of Year
- Muslim Gen Z Destination of Year
- Muslim Millennial Destination of The Year
- Muslim Gen Z Destination of Year

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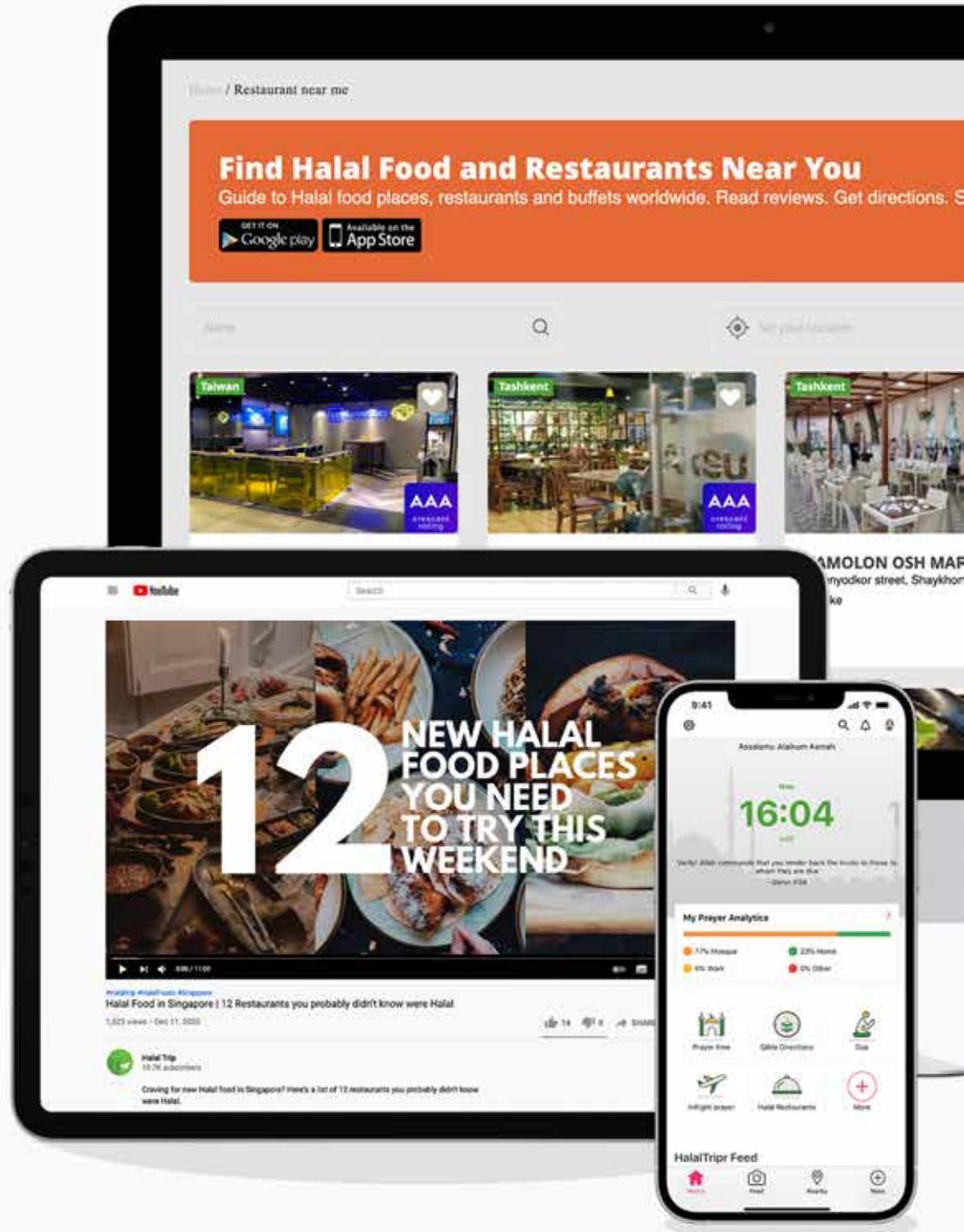


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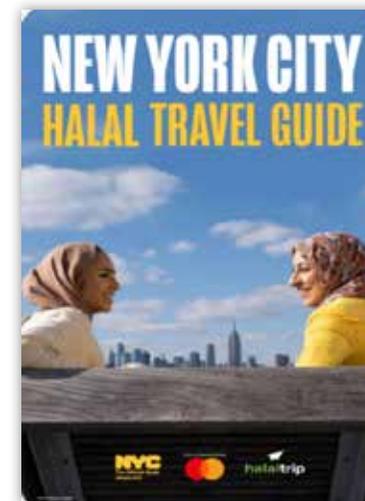
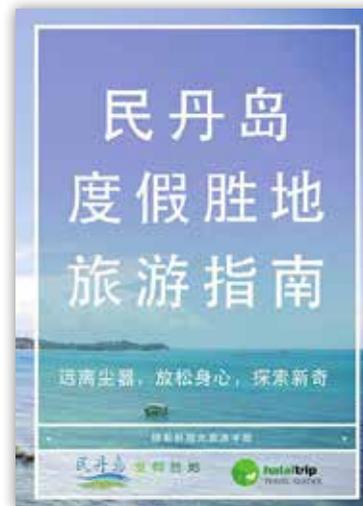
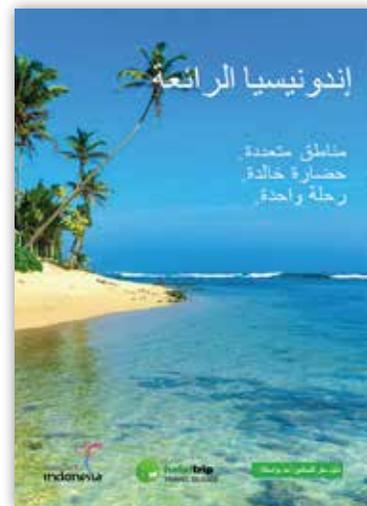
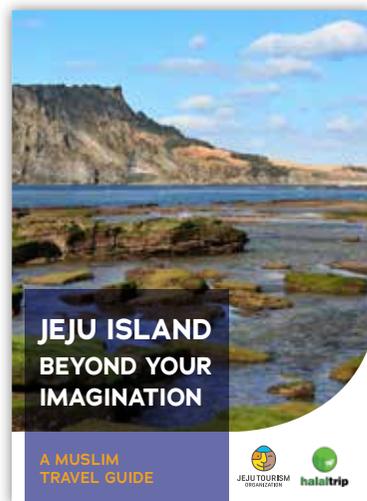
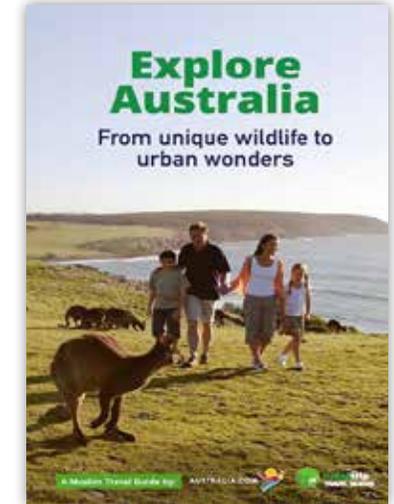
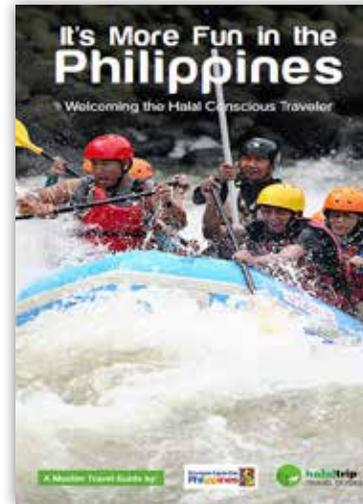




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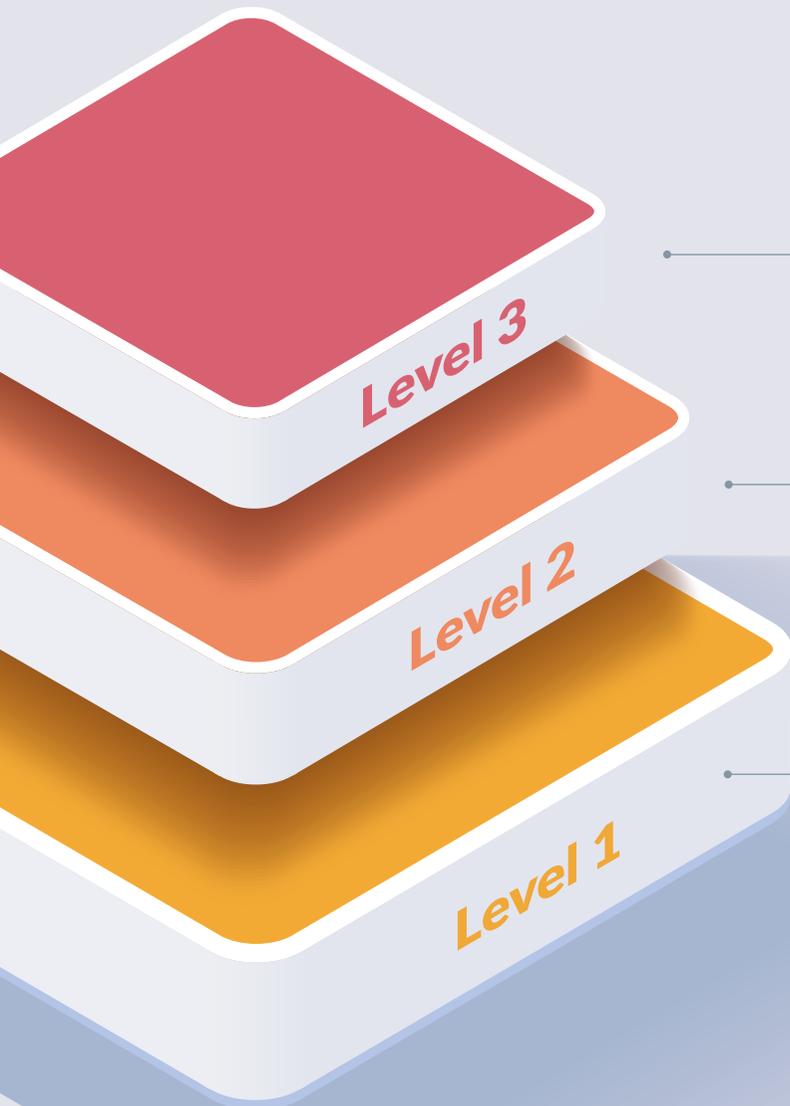


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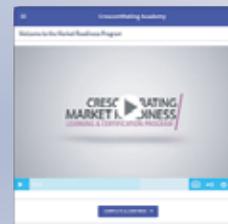


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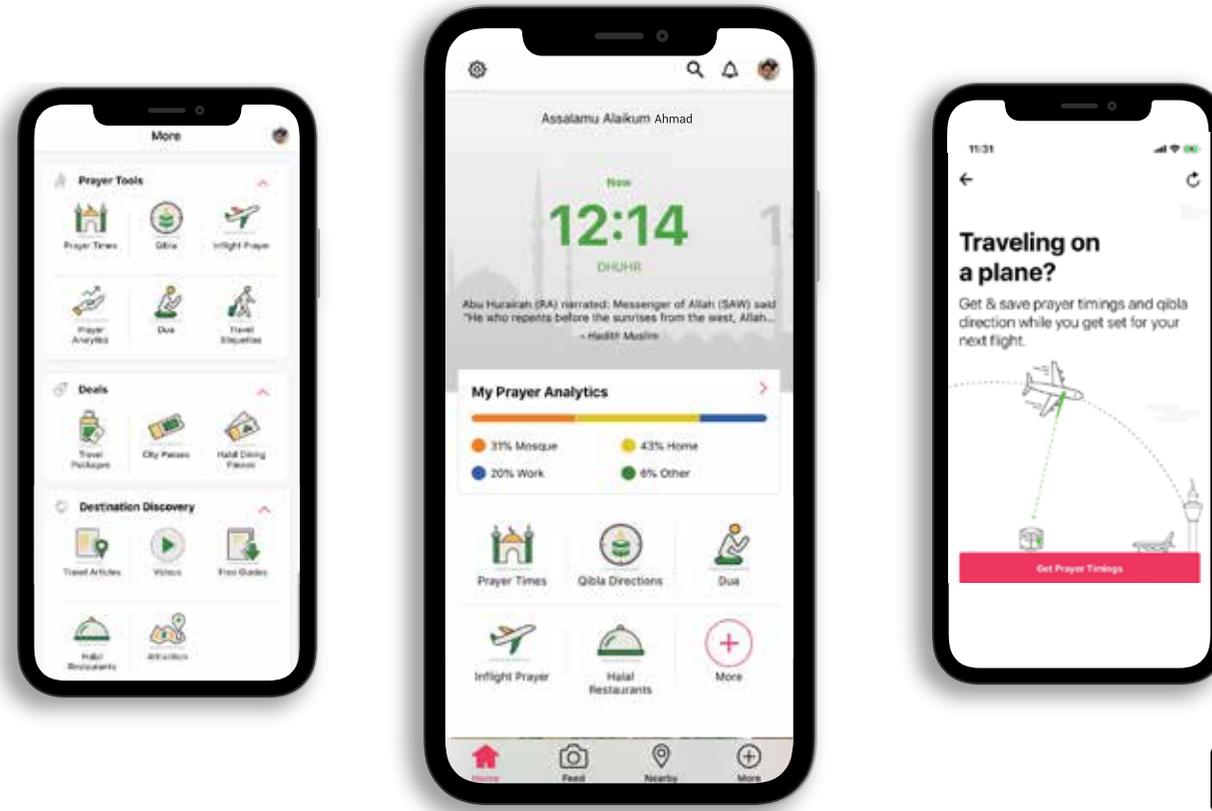
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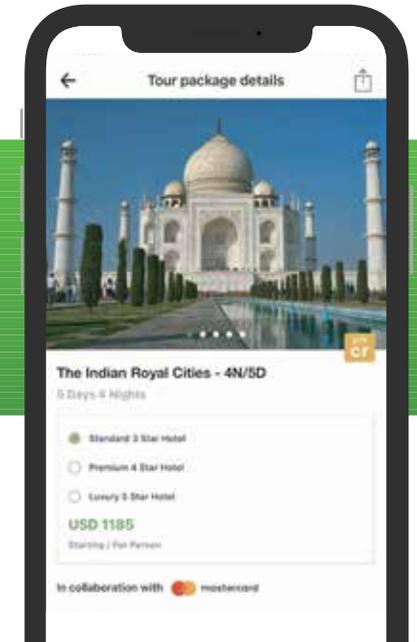
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