

MASTERCARD
CRESCENTRATING

GLOBAL MUSLIM TRAVEL INDEX 2024

BRIDGING JOURNEYS

Spotlight on RIDA
Framework and Accessible
Travel in GMTI 2024





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01

FOREWORD





Fazal Bahardeen

Founder & CEO
CrescentRating
HalalTrip



As we continue exploring global travel's evolving dynamics, we are excited to present the 9th edition of the Mastercard-Crescentrating Global Muslim Travel Index (GMTI) 2024. Our annual report remains committed to providing critical insights into the Muslim travel market, a segment known for its dynamic growth and resilience.

This year, we are proud to introduce significant enhancements to the Muslim travel sector, notably the RIDA framework. This comprehensive model is not just a new addition but a substantial step towards enriching the Muslim travel experience. It focuses on Responsible, Immersive, Digital, and Assured travel dimensions, reflecting our ongoing commitment to innovation and our desire to support the diverse needs of Muslim travelers. The introduction of the Accessible Travel dimension within the RIDA framework marks an important step towards inclusivity, ensuring that travel experiences are accessible to all. We have also expanded the Muslim-Women-friendly rankings. Now, it includes the top 20 destinations in both OIC and non-OIC categories, ensuring that the unique needs of Muslim women travelers are understood and catered to.

The GMTI 2024 ranking highlights the steadfast performance of traditional leaders like Malaysia and Indonesia and acknowledges the impressive strides made by emerging destinations such as Taiwan, Thailand, Spain, South Africa and The Philippines..

In 2023, the number of Muslim international visitors almost returned to the levels seen before the pandemic with around 145 million Muslim international visitors. Looking ahead to 2024, the Muslim travel market is expected to not only recover its pre-pandemic levels but also exceed them by 3% to 5%. This growth trend is expected to continue, as we continue to project that Muslim international arrivals could reach 230 million by 2028, accompanied by an estimated expenditure of USD 225 billion.

This year we have also taken a deep dive into the demographic profile of the Muslim population worldwide. It shows a youthful demographic, with a significant portion under the age of 40, which is technologically savvy, socially connected, and increasingly influential in shaping travel trends and demands. This demographic is not only a large consumer base but also a key driver of Muslim travel growth, as their preferences and behaviors significantly influence the travel market. Understanding the demographic profile and age distribution of Muslim populations is therefore crucial for anticipating and meeting the evolving needs of Muslim travelers.

We are also excited to continue tracking the HalalTrip Muslim Travel Intent Tracker (MTIT), which offers monthly insights into the travel intentions and preferences of the Muslim traveler community. This is an important tool in understanding and forecasting trends within this market segment.

Together with our long-term partner, Mastercard, we delve deeper into the nuances of Muslim demographics and the evolving travel market, underscoring the importance of this diverse and influential segment. Our data and insights are designed to empower industry stakeholders to effectively cater to the unique needs and preferences of Muslim travelers, enhancing the overall travel experience and contributing positively to the global travel industry.

The GMTI 2024 report is an essential resource for anyone involved in the travel and tourism sector, offering critical insights and strategies to tap into the Muslim travel market. We are confident that this report will provide all stakeholders with the tools and understanding needed to capitalize on the opportunities within the Halal tourism landscape and foster a more inclusive and respectful global travel environment.



Safdar Khan

*Division President
Southeast Asia
Mastercard*



Across the globe, travel is back and breaking new boundaries.

Research from the Mastercard Economics Institute shows that passenger traffic is soaring, with nine of the past ten record-spending days in the global cruise and airline industries happening just this year.

Amidst this global surge in travel, Southeast Asia has emerged as one of the big winners. Our research found that Indonesia and Malaysia were among the top 10 most popular destinations worldwide over the previous 12 months, while Bangkok (Thailand) and Bali (Indonesia) were both ranked in a separate list of 2024's top 10 trending summer hotspots.

These findings align closely with this year's Mastercard-CrescentRating Global Muslim Travel Index, where Indonesia and Malaysia are once again the top two OIC destinations for Muslim arrivals, while Singapore and Thailand are ranked first and fifth respectively in terms of non-OIC destinations.

The region is witnessing a remarkable upturn, as Southeast Asia is not only attracting a growing number of tourists, but these visitors are also lengthening their stays and injecting more into the local economy through increased spending at their chosen destinations. As of March 2024, we saw tourists on average spending approximately one more day on vacation per trip than they did pre-Covid, while travel spend in the apparel and dining categories has shown a substantial increase compared

to one year ago. Whether it is spending on luxury apparel in Malaysia (up 47.1%) or fine dining in Indonesia (up 61.4%), people are finding ways to stretch their travel budgets and get the best value and experiences from their trips.

Responding to these travel trends represents a huge opportunity for tourism authorities and travel operators. To succeed, it is crucial that they are able to cater to the demands of overseas Muslim visitors. We believe that leveraging digital technology will be essential. For instance, we are already witnessing how artificial intelligence is reshaping the travel industry by opening the door to unprecedented levels of travel customization, enabling a hyper-personalized experience that will redefine the way we travel.

At Mastercard, we empower policy makers and travel businesses by furnishing them with essential data and insights. These tools enable them to craft tailored strategies aimed at advancing growth in the travel industry, while simultaneously catering to the evolving needs and expectations of global travelers.

That's why we are excited to continue our collaboration with CrescentRating in promoting the Muslim travel market. This year marks the tenth anniversary of our work together, and from everyone at Mastercard, we would like to thank Fazal Bahardeen and his team for their long-standing partnership.



CONSUMERS

- Muslim-friendly Cruise 2024
- Muslim Gen Z Travel 2023
- Muslim Women In Travel 2019
- Digital Muslim Travel 2018
- Muslim Millennial Travel 2017
- Muslim Business Traveler 2016

INDUSTRIES

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

GLOBAL MUSLIM TRAVEL INDEX (GMTI)

- GMTI 2024
- GMTI 2023
- GMTI 2022
- GMTI 2021
- GMTI 2019
- GMTI 2018
- GMTI 2017
- GMTI 2016
- GMTI 2015

COUNTRIES

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

ECONOMIES

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

Mastercard & CrescentRating Insights into the Muslim Market

Dive into the wealth of insightful reports from Mastercard and CrescentRating. These reports offer a detailed look at the thriving Muslim travel market, packed with global trends and consumer insights. Each publication gives you an in-depth understanding of this market segment and the unique needs of Muslim travelers. This collection reflects the deep commitment to serving Muslim communities around the world, helping travel brands create inclusive and innovative experiences tailored for them. Whether aiming to tap into new markets or enhance existing Muslim travel offerings, these reports are an invaluable resource.



Download the Reports here

02

TRENDS, OPPORTUNITIES AND KEY TAKEAWAYS



What is New in this Report

This year's report is a gateway to a world of pioneering enhancements and initiatives poised to redefine the future of Muslim-friendly tourism



Introducing the RIDA Framework

The RIDA framework is a holistic model that integrates four core dimensions — Responsible, Immersive, Digital, and Assured — into the travel experience. This framework provides a foundation for destinations to create travel experiences that cater to the specific needs of Muslim travelers.



Accessible Travel Commitment

To ensure that travel experiences are convenient and respectful for everyone, including Muslim travelers with specific accessibility needs, the Accessible Travel Framework has been developed, demonstrating a commitment to inclusivity. Additionally, metrics in the ACES criteria have been introduced to measure the commitment of destinations to accessible tourism.



Visa-Free Travel Analysis

This year's report examines visa-free travel and its impact. The analysis includes a look at visa-free travel within OIC (Organization of Islamic Cooperation) destinations, emphasizing the ease and benefits of intra-OIC travel for Muslim tourists. The report also introduces the Intra-OIC Visa-Free Travel Index, which ranks and evaluates OIC destinations based on the ease of travel across borders. This analysis underscores the trend towards visa-free travel, fostering greater global mobility.



Expanding Muslim Women-Friendly Destinations

Acknowledging the unique travel preferences of Muslim women, GMTI 2024 has expanded its focus on destinations that cater specifically to them, ensuring safety, privacy, accessibility, and a welcoming environment.



Halal Food Diversity

This year, the Global Muslim Travel Index enhances its focus on the culinary landscape, highlighting the significance of Halal food diversity at travel destinations. The HalalTrip Gastronomy Awards debut in Singapore recognizes the diversity of Halal cuisines offered to respond to the Muslim traveler's desire for diverse and authentic dining experiences.



Muslim Population Demographics and Economic Indicators

The report delves deeper into the demographics of the Muslim population and examines the economic indicators of OIC destinations. It offers insights into the age distribution and growth trends of the Muslim population worldwide. Additionally, it provides rankings of the top OIC destinations based on economic and population indicators.

Key takeaways of GMTI 2024

Resurgence and Growth: Trends in the Muslim Travel Market

In 2023, the Muslim travel market witnessed a significant surge, with approximately 145 million Muslim international arrivals, which is about 90% of the pre-pandemic levels of 2019. This recovery indicates the strong bounce-back and the persistent demand within the Muslim travel sector. Looking ahead to 2024, the Muslim travel market is projected to not only regain its pre-pandemic levels but also surpass them by 3% to 5%, with expected arrivals ranging between 164 to 168 million. This growth trend is expected to continue, with projections showing that Muslim international arrivals could reach 230 million by 2028, accompanied by an estimated expenditure of USD 225 billion. This forecast indicates a robust expansion of the market, driven by increasing disposable incomes, population growth in Muslim-majority countries, and greater accessibility to travel resources.

More Destinations Becoming Muslim Women-Friendly

Recognizing the increasing significance of catering to Muslim women travelers, the 2024 GMTI has expanded its Muslim Women-Friendly rankings to include the top 20 destinations in both OIC and non-OIC categories. In the OIC category, the top five destinations are Malaysia, Indonesia, Qatar, Brunei, and Maldives. For the non-OIC category, Singapore, Hong Kong, Taiwan, Ireland, and Japan lead the rankings.

Youthful Dynamics: Understanding the Demographic Trends in Muslim Travel

The demographic profile and age distribution of Muslim populations present unique insights into the future dynamics of the Muslim travel market. Analyzing the age groups within Muslim communities reveals significant trends that will influence travel preferences and behaviors. The Muslim population is projected to grow from 2.12 billion in 2024 to 2.47 billion by 2034, increasing from 26% to 28% of the global population. Notably, there will be substantial growth in the middle age groups (21-30 and 31-40), which are significant for the travel industry due to their economic activity and travel propensity.

Enhanced Scores and Expanding Reach in GMTI 2024

The GMTI 2024 has shown a notable increase in the average scores across destinations, with a nearly 10% improvement overall. This significant rise indicates that more destinations worldwide are enhancing their facilities and services to better cater to Muslim travelers. Despite some shifts in rankings, almost all top 20 destinations have improved their GMTI scores. Non-OIC destinations have particularly shown robust progress, with their top 20 average scores increasing by over 6%. These improvements underscore the efforts by non-OIC destinations to attract Muslim travelers through better understanding and provision of Muslim-friendly travel options. New destinations are entering the top ranks, and existing ones are continuously improving, showcasing a global shift towards more inclusive and culturally sensitive travel solutions.

Global Leaders and Rising Stars in Muslim-Friendly Travel

The OIC destinations comprising Malaysia, Indonesia, Saudi Arabia, Turkiye, and UAE are dominating the top positions in the GMTI ranking. These destinations are widely known for their comprehensive services that cater to the needs of faith-based travelers. On the other hand, non-OIC destinations such as Singapore, United Kingdom, Taiwan, and Thailand are also making significant efforts in catering to Muslim travelers. Moreover, emerging destinations like the Philippines, Hong Kong, South Africa, and Spain are also gaining popularity among Muslim travelers due to their increased efforts in providing Muslim-friendly amenities. These destinations have been actively rolling out programs to attract Muslim travelers.

Seizing Opportunities in the Muslim Travel Market

Demand-Side Drivers

Population & Demographics: The global Muslim population is not only growing fast but also young, with more than 70% under the age of 40. This demographic is tech-savvy, socially active, and interested in exploring international destinations. Their growing numbers and increasing disposable income are driving the demand for travel that considers their faith-based needs.

GDP Growth: Economic growth in Muslim-majority destinations has bolstered the middle class, increasing their disposable income and propensity to travel. Destinations like Indonesia, Malaysia, and the Gulf nations see higher GDP per capita, which correlates directly to increased travel activity as they seek to explore new experiences.

Halal Awareness & Digital Connectivity: Awareness about Halal options has grown significantly, influencing not only food consumption but also the broader lifestyle choices of Muslims, including travel. Enhanced digital connectivity has empowered consumers to look for the best options that comply with Halal standards, from accommodations and services to travel apps that guide them to Muslim-friendly services worldwide.

Responsible Tourism: The Muslim travel market is increasingly driven by values that emphasize sustainability and ethical considerations. This trend aligns with the global shift towards responsible tourism, where travelers prefer destinations that support environmental conservation, promote social responsibility, and contribute positively to the local economy.

Supply-Side Drivers

Strategic Destination Diversification: More destinations are enhancing their appeal to the Muslim market as a key avenue to diversify their visitor base. By integrating services and facilities that cater to Muslim travelers, such as Halal food options, prayer facilities, and culturally sensitive environments, destinations can attract a broader audience and reduce over-reliance on a few traditional markets.

Enhancing Understanding and Communication: There is an effort on improving cross-cultural communication and understanding to better serve diverse markets, including Muslim travelers. Training programs for hospitality staff, informational campaigns about faith traditions, and multilingual support in tourist hotspots are examples of how destinations are building a more welcoming atmosphere for all travelers.

Developing Halal Tourism Ecosystems: Beyond individual services, some destinations are developing comprehensive Halal tourism ecosystems. This includes expanding the availability of Halal restaurants, shopping centers, and entertainment options that cater to their needs, making the destination more attractive to Muslim families and groups.

Leveraging Technology for Personalized Experiences: Utilizing advanced technologies to offer personalized travel experiences for Muslim travelers, such as apps that locate Halal food outlets, Qibla directions, and prayer timings. Digital innovations also help in marketing these destinations effectively to Muslim travelers by highlighting their readiness to accommodate faith-based needs.

Strategic and Economic Benefits of Muslim-Friendly Tourism

Develop the Destination as a Muslim-Friendly Destination

Integrating Halal food options, creating culturally sensitive environments, providing prayer facilities, and ensuring that accommodation respects faith-traditions make the destination appealing to Muslim travelers.

Open trade Opportunities and Investments

Enhances economic ties with OIC countries, boosting the local and international trade in Halal products. This growth in the Halal economy not only expands markets for local producers but also attracts foreign investors interested in the global Halal market.

Increase Muslim Visitor Arrivals

By meeting the unique needs and expectations of Muslim travelers, the destination can increase its share of Muslim tourist arrivals.



Bridges Cultures and Fosters Understanding

Promoting interactions between travelers and locals can enhance cultural understanding and appreciation. This mutual respect enriches the tourism industry by creating a more welcoming and inclusive environment for all travelers.

Diversify Tourist Arrivals

Muslim-friendly initiatives open the destination to a broader spectrum of visitor profiles and source markets. This diversification helps stabilize seasonal tourism flows and reduces economic dependency on traditional and limited markets.

Global Trends Shaping the Muslim Travel Market: Responsible and Immersive Dimensions

As the Muslim travel market continues to expand, so does the range of experiences sought by Muslim travelers. Emphasizing responsible and immersive travel, they are visiting new places and seeking deeper, more meaningful engagements with their destinations. There are several key global trends that are reshaping how Muslim travelers interact with the world, from managing overtourism to engaging in community-based tourism and seeking authentic local dining experiences. Each trend not only enhances the travel experience but also aligns with the core faith-traditions of community, stewardship, and respect for diversity.

Managing Overtourism: This involves initiatives to better manage the number of visitors to over-visited locations to prevent environmental degradation and preserve cultural heritage. For Muslim travelers, especially those visiting cultural and heritage sites, managing over tourism helps maintain the sanctity and ambiance of these places, making the experiences more personal and reflective.

Community-Based Tourism: Focuses on local communities providing tourism services that showcase their culture, traditions, and lifestyle, promoting sustainable economic growth. Engaging directly with local communities allows travelers to experience authentic interactions and supports local economies, aligning with the faith-traditions of community support and ethical spending.

Accessible Tourism: Making tourist attractions and services accessible to all, regardless of physical ability, including transport, accommodation, and facilities. Accessible tourism holds particular significance in the Muslim travel market due to the community-oriented nature of travel in Muslim cultures. Many Muslim travelers often journey as part of extended family groups that include elderly members and small children.

Deep Cultural Immersion: Encourages travel experiences that offer an in-depth understanding of the local culture, history, and people. Muslim travelers often seek to connect with the Islamic history of their destinations, such as visiting historical mosques and Islamic landmarks, which enriches their faith and their understanding of global Muslim heritage.

Local Dining Experience: Emphasizes authentic local food experiences that go beyond standard offerings to include local culinary and specialties. Exploring local Halal cuisines allows Muslim travelers to enjoy authentic dishes, enhancing their cultural and culinary experience.

Festival Travel: Participating in local festivals to experience the culture, traditions, and celebrations first-hand. Engaging in Islamic festivals like Eid or Ramadan in different cultural contexts allows Muslim travelers to see how Islam is celebrated across the world, deepening their faith and global community connection.

Eco-conscious Travel: The rise of environmentally responsible travel practices that minimize ecological impact. This aligns with the Islamic principle of stewardship of the earth, encouraging Muslim travelers to choose eco-friendly destinations and practices that conserve nature.

Global Trends Shaping the Muslim Travel Market: Digital Dimension

Delving deeper into the modernization of the travel industry, these digital trends are reshaping the travel landscape for today's connected traveler. This trends show how advancements in technology such as artificial intelligence, cashless payments and streamlined immigration processes are enhancing travel experiences, making them more seamless and integrated than ever before. These trends represent a significant shift towards a more digital, efficient, and personalized travel environment, meeting the evolving needs and expectations of all travelers.

Cashless Transactions: The move towards cashless transactions is revolutionizing the travel industry by providing a safer, more convenient, and streamlined financial experience for travelers. This involves the use of digital payment methods such as credit and debit cards, mobile wallets, and contactless payments, which are becoming increasingly used across globe. These methods not only reduce the need to carry large amounts of cash, but also facilitate quicker transactions, reducing wait times and enhancing the overall convenience of travel. Furthermore, cashless systems offer the added advantage of easier tracking and management of expenses, helping travelers maintain better control over their budgets.

AI-Powered Travel: Use of artificial intelligence to customize travel experiences, offer recommendations, and provide customer support through chatbots and virtual assistants. AI can help Muslim travelers find Halal food options, locate prayer spaces, and even translate local languages, simplifying travel logistics while adhering to faith traditions.

Hassle-Free Immigration: The trend of hassle-free immigration is transforming international travel by streamlining the entry and exit processes at borders. This utilizes advanced technologies such as e-gates, biometric verification, and automated passport control systems to reduce wait times and improve efficiency. A key innovation in this area is the use of QR codes as digital travel credentials. These QR codes can store encrypted data about the traveler's identity and travel details, which can be quickly scanned and verified by immigration authorities. This method is being tested now in some destinations as it reduces the need for physical passport checks and speeds up the immigration process, making it less cumbersome for travelers. The adoption of QR codes and other digital solutions in immigration processes reflects a broader move towards digitization in travel, aiming to enhance security while ensuring a smoother and more enjoyable travel experience for all.

Digital Nomads: The digital nomad lifestyle is a growing trend where individuals leverage technology to work remotely while traveling the world. Enabled by advancements in digital communication, cloud computing, and mobile technology, digital nomads can perform their work from virtually anywhere that has a reliable internet connection.

03

The RIDA Framework Future Proofing Muslim Travel



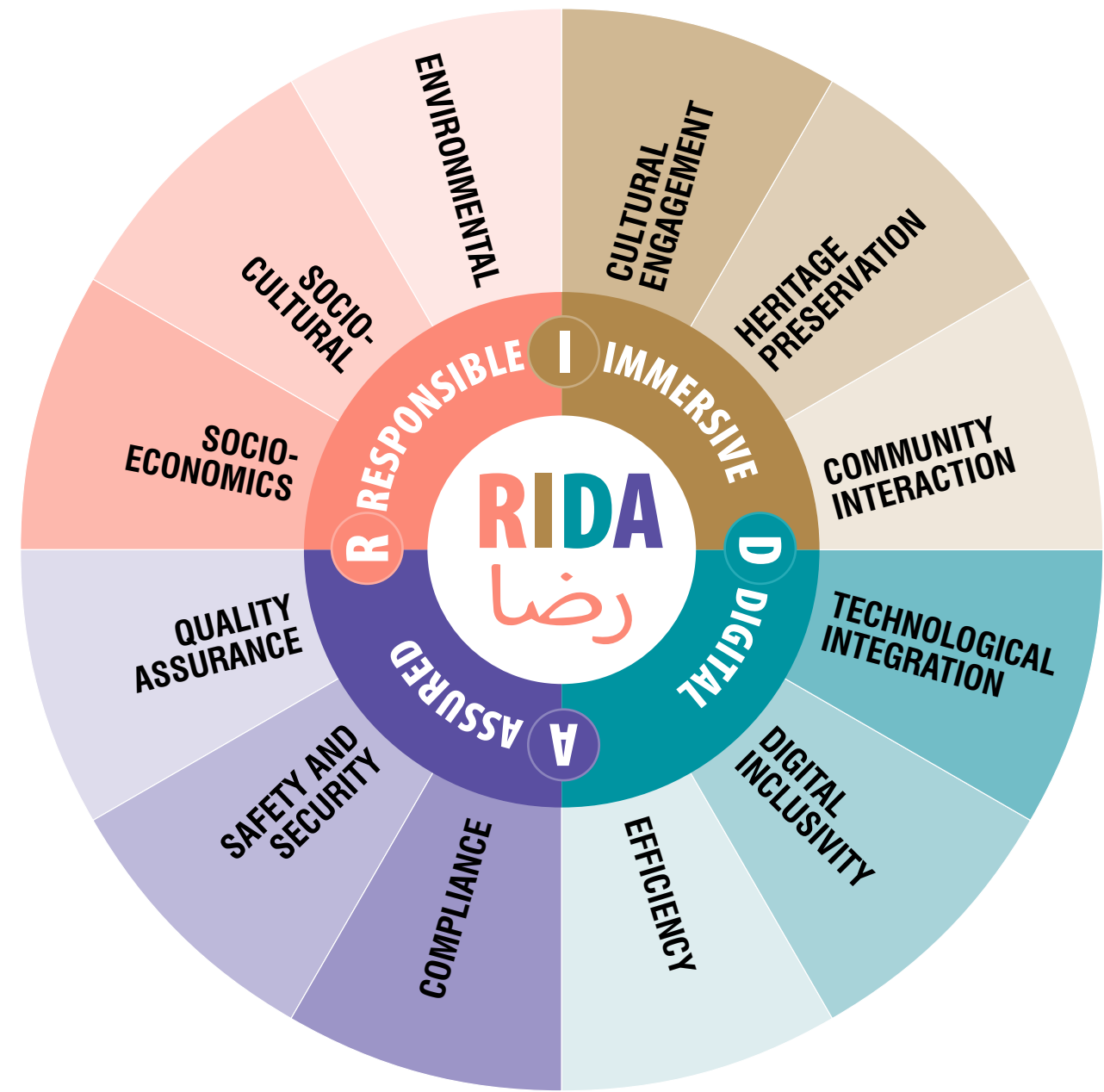
Introduction to the RIDA Framework - Embracing Innovation and Tradition in Muslim Travel

The landscape of global tourism is evolving, shaped by emerging technologies, changing traveler expectations, and increasing awareness of sustainability. In this dynamic environment, the Muslim travel market remains a significant and growing segment, necessitating innovative strategies to meet its unique needs. The RIDA framework, developed by CrescentRating, is a response to these challenges, integrating core principles of responsible tourism with the latest technological advancements to future-proof Muslim travel.

RIDA—standing for Responsible, Immersive, Digital, and Assured—offers a model designed to enhance the travel experience for Muslim tourists while adhering to their faith-based needs. This framework not only caters to the requirements of Halal compliance and cultural sensitivity but also aligns with broader industry trends towards digitalization and personalized services. It serves as a blueprint for destinations and service providers aiming to optimize their offerings and effectively engage with the Muslim travel market.

The inception of the RIDA framework was inspired by the need for a holistic approach that bring together traditional hospitality values with modern innovation. It embodies the concept of ‘Rida,’ an Arabic word (رضا) that signifies contentment and satisfaction—essential qualities that travelers seek in their journeys. By integrating all four dimensions in a service or facility, the service providers can ensure that all aspects of travel are covered comprehensively.

The RIDA Impact Score (RIS) is an evaluative tool under development within the RIDA framework. It aims to measure the integration of its four core dimensions—Responsible, Immersive, Digital, and Assured—by tourism services. This scoring system will serve as a benchmark for tourism providers, highlighting how well their offerings meet the needs of travelers. By assessing elements like sustainability, cultural authenticity, technological integration, and service assurance, the RIS will promote continuous improvement and help travelers make informed choices.



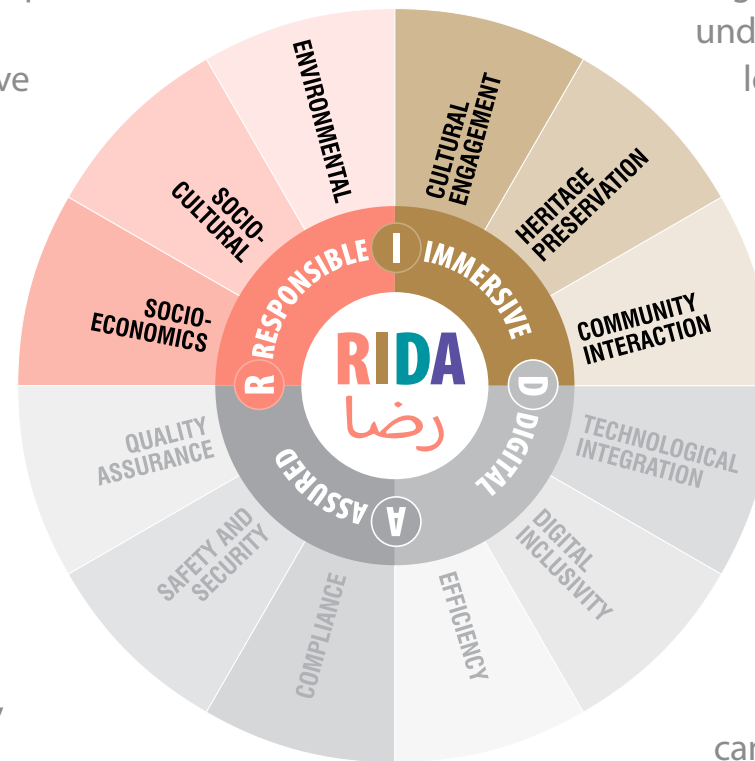
Insights into the RIDA Framework: The Responsible and Immersive Dimensions

Responsible Dimension

Socio-Economics: focuses on prioritizing spending on local businesses and community causes to support local communities economically and socially. This helps in the broader social and economic development of communities and upholds the principles of fair trade and ethical consumption. By supporting companies that engage in ethical practices such as offering fair wages and maintaining humane working conditions, tourism can drive positive change. Additionally, accessible travel initiatives promote inclusivity and ensure that facilities and services are available to all travelers.

Socio-Cultural: Focuses on preserving cultural heritage and respecting local customs, traditions, and values, which fosters positive interactions between travelers and local communities. This also emphasizes the importance of education and awareness among travelers regarding faith traditions and responsible tourism practices. Accessible Travel can further promote inclusivity and respect for diverse participant needs.

Environmental: Advocates the interconnectedness of all creation, encouraging travelers to appreciate and conserve the natural environments of the destinations. It promotes compassion towards animals, aligning with faith traditions of kindness and mercy, and supports environmental sustainability by advocating for the welfare of all living creatures. Travelers are encouraged to engage in practices that minimize environmental impact and support the preservation of biodiversity, ensuring that the beauty and vitality of destinations are maintained for future generations.



Immersive Dimension

Cultural Engagement: Emphasizes creating deep, meaningful connections between travelers and the local culture through engaging and interactive experiences. By participating in workshops, travelers can learn local crafts or cooking techniques directly from artisans and chefs, providing a hands-on understanding of cultural practices. Cultural tours led by knowledgeable local guides can delve into the history, stories, and significance of cultural landmarks.

Heritage Preservation: Focuses on the conservation and promotion of historical and cultural heritage sites. Efforts here ensure that these sites are not only preserved but are also accessible to tourists in a manner that respects their historical integrity. Supporting heritage preservation involves funding and research initiatives that help maintain and restore sites, educational programs that inform visitors about the site's significance, and sustainable tourism practices that protect these treasures while making them available for educational and cultural understanding.

Community Interaction: Developing programs that facilitate interaction between travelers and local communities. These interactions can take many forms, such as community-led tours, homestays, or participation in local festivals and events, which allow travelers to experience daily life and hospitality firsthand. Such programs not only enrich the travel experience but also promote mutual respect and understanding between diverse cultures. They provide economic benefits to the local communities by directing tourism revenues to local hosts and businesses, and they offer travelers a more nuanced and comprehensive understanding of the places they visit.

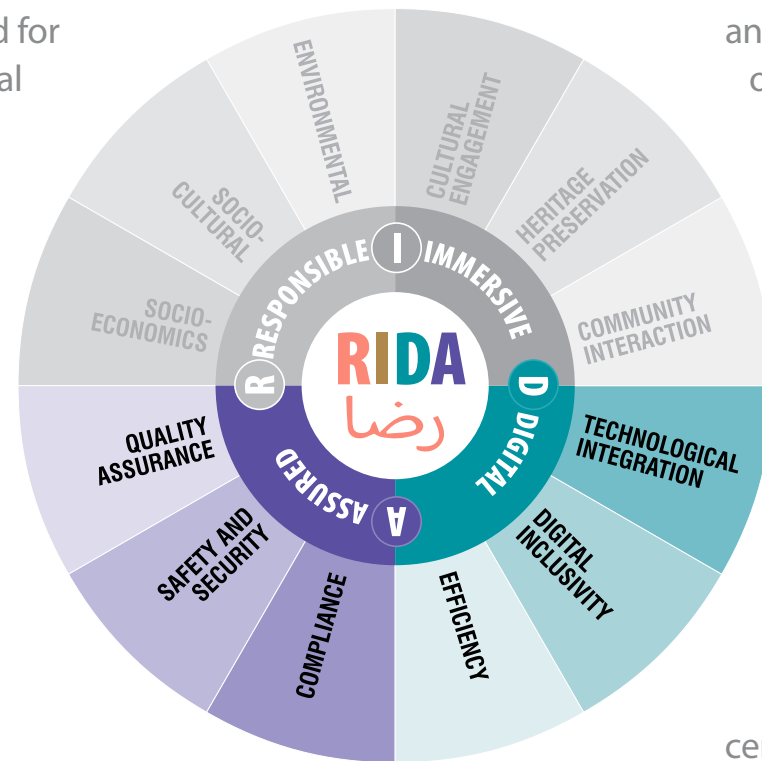
Detailed Insights into the RIDA Framework: The Digital and Assured Dimensions

Digital Dimension:

Technological Integration: Focuses on harnessing cutting-edge technologies' power to enhance Muslim travelers' travel experience. By integrating technologies such as Artificial Intelligence (AI), and virtual reality, the travel sector can offer highly personalized services that cater specifically to the needs of Muslim travelers. AI can be used for customized travel recommendations, and virtual reality for virtual tours of destinations before actual visits. This technological integration not only improves the efficiency of travel operations but also enhances the accessibility and quality of travel experiences, making them more adaptable and responsive to the needs of the modern traveler.

Digital Inclusivity: Digital inclusivity ensures that all digital travel platforms, tools, and resources are accessible to everyone, including travelers with disabilities. This involves designing websites, mobile apps, and other digital resources to be user-friendly for people with various disabilities, such as visual, auditory, or physical impairments.

Efficiency: Digital technology in travel processes enhances efficiency and seamlessness for travelers by enabling mobile check-ins and e-tickets, which reduce wait times and streamline airport procedures. Real-time updates and navigation tools delivered via mobile apps keep travelers informed of any changes or delays, improving convenience and predictability during travel.



Assured Dimension:

Quality Assurance: Focused on upholding high service quality standards across all travel experiences. Quality assurance in the travel industry involves rigorous evaluation and continuous improvement of service protocols, regular training for staff to enhance service delivery, and maintaining an ongoing feedback loop with customers to refine offerings. By integrating Crescentrating's faith-based service needs model, service providers can tailor their services to meet Muslim travelers' specific faith-based requirements, ensuring that travel experiences are aligned with their expectations and preferences.

Safety and Security: Adopting stringent safety and security protocols is critical to protecting travelers and ensuring their peace of mind. This includes not only physical safety measures but also data security practices to protect personal information. Implementing comprehensive strategies to secure data handling practices reassures travelers of their physical and digital safety.

Compliance: Promotion of adherence to standards and obtaining certifications are essential to assure the quality of services and their compliance with Halal or Muslim-friendly requirements. This aspect involves regular audits, compliance checks, and certifications/ratings from recognized bodies to ensure that services—from food and beverage to leisure activities—can cater to the needs of Muslim visitors.

04

Accessible Travel from a Halal Travel Perspective



Unlocking Barriers: Embracing Accessible Travel for Inclusive Journeys

Accessible travel is a fundamental aspect of responsible tourism that ensures all people, including those with disabilities, elderly individuals, and families with young children, can participate fully and enjoy the travel experiences. This responsible tourism approach aligns with global movements towards inclusivity and equality, aiming to remove barriers preventing individuals from accessing and enjoying tourism services.

Muslims often travel as multi-generational family groups, which underscores the importance of accessible travel for Muslim travelers. Ensuring that travel services cater to these needs is not just about providing accessibility in the physical sense but also about respecting and upholding the dignity of all travelers. The concept of accessible travel also aligns with Islamic faith objectives, which emphasize preserving dignity and life. These objectives call for creating environments where all individuals are treated with respect and their physical and spiritual needs are met.

By integrating these principles, the travel industry can provide services that are not only physically accessible but also sensitive and inclusive to all travelers.



“**Over 1 billion** people worldwide live with some form of disability, representing about **15% of the global population.**” - UN



“**Only 9%** of global tourism destinations are equipped with accessibility solutions for travelers with specific needs.” - UNWTO



Diversity, Equity, Inclusion & Belonging will be key to the long-term, sustainable future of a sector that is forecast to **support 430 million jobs in 2033**” – WTTC

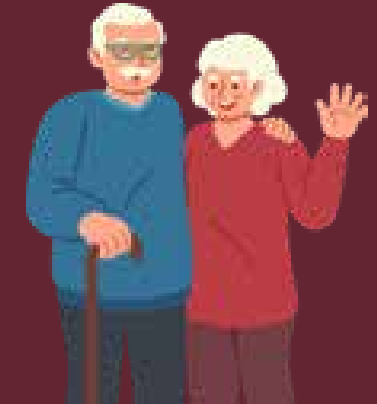


“The accessible tourism market is valued at over **\$150 billion annually** in the US and Europe alone.” - Open Doors Organization

“The prevalence of disability increases with age, with a higher percentage of people **reporting disabilities in older age groups.**”
- Australian Bureau of Statistics

“Almost 50% of people **aged more than 60 have a disability.**”
- UNDESA

“By 2050, **2 billion people**, over 20% of the world population, will be 60 or older, with a significant increase in the oldest populations.”
- UN



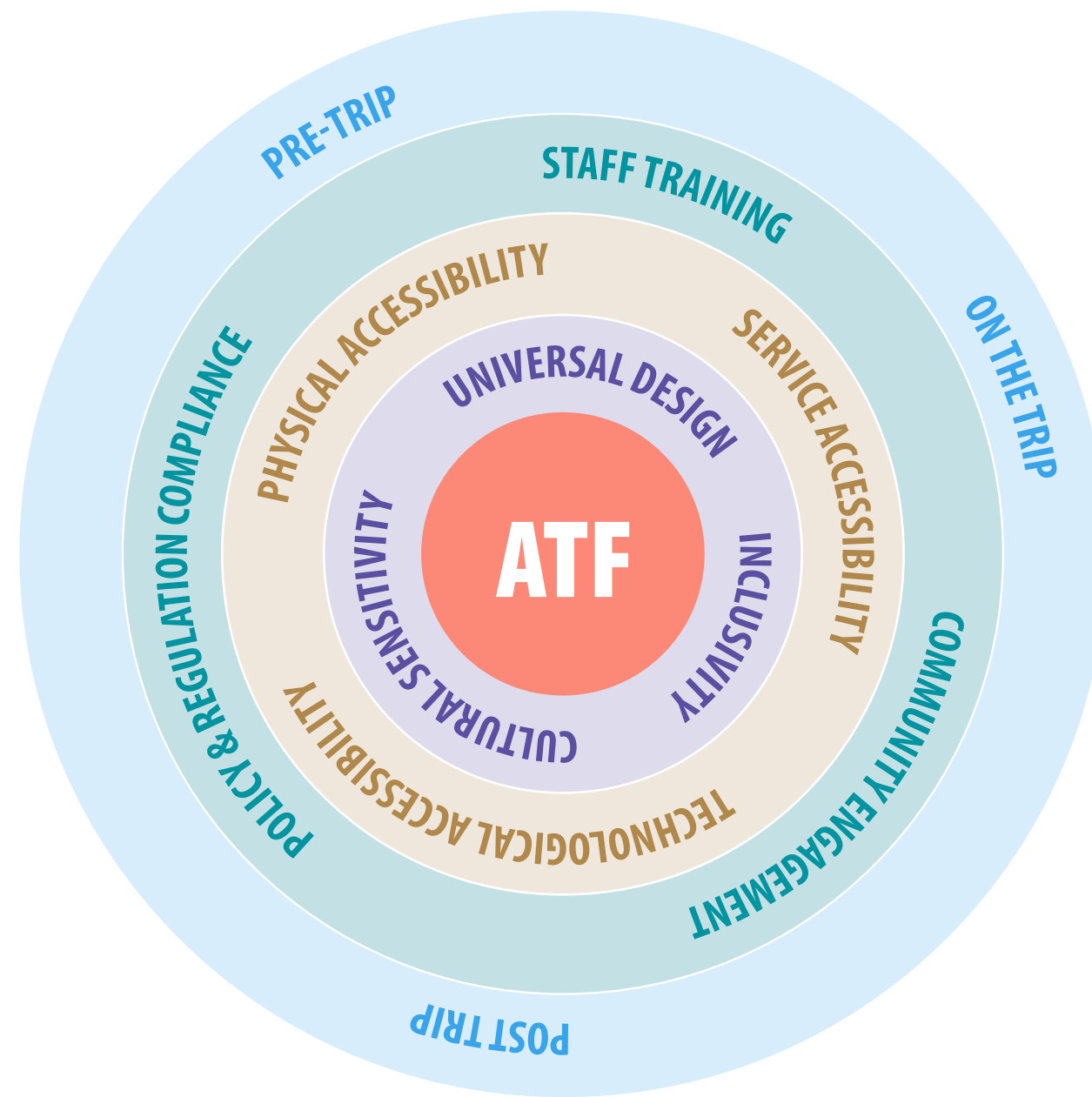
According to a survey by MMGY Global, the majority (**96%**) of **disabled travelers faced an accommodation problem** while traveling, experienced flight problems (86%), or have had in-market transportation problems (79%).

Envisioning Access: The Accessible Travel Framework (ATF)

The Accessible Travel Framework (ATF) aims to provide an easy-to-adopt guideline for developing accessible services in the travel industry. It recognizes the diverse needs of travelers, including those with disabilities and specific cultural and faith requirements. The ATF covers several aspects that need to be available in trip planning, during the trip, and post-trip.

It is based on the fundamental principles of inclusivity, cultural sensitivity, and universal design. Surrounding these principles are the accessibility components, which include physical accessibility, service accessibility, and technology accessibility. The implementation layer includes staff training, community engagement, and policy and regulation compliance. Finally, the framework addresses all travel stages: pre-trip, during trip, and post-trip. This comprehensive approach ensures that all aspects of travel are designed to be inclusive and accessible for every traveler, including Muslim travelers with specific cultural and faith requirements.

This year's GMTI has taken a significant step by including some accessibility metrics in its evaluation, reflecting a growing recognition of the importance of inclusive travel services. These metrics, further detailed in the ACES section, aim to highlight and encourage improvements in accessibility across the travel industry.



Accessible Travel Framework: Ensuring Inclusivity for All Travelers

Foundational Principles

Inclusivity: Ensuring that all services and facilities are usable by people of all abilities

Cultural Sensitivity: Facilities and services are designed to respect and cater to faith practices, such as prayer spaces, Halal food options, and appropriate privacy measures.

Universal Design: Implementing a design approach that creates products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. This includes wide doorways for wheelchair access, clear signage for those with visual impairments, and user-friendly website interfaces for easy navigation.

Accessibility Components

Physical Accessibility: Modifications and designs in infrastructure are crucial to ensure that buildings, transport, and public spaces are accessible for all. This includes ramps, elevators, accessible washrooms, and seating arrangements that accommodate wheelchairs and assist those with limited mobility. For Muslim travelers, ensuring accessibility extends to mosques and ablution spaces should be designed or adjusted to be fully accessible.

Service Accessibility: Provision of universally accessible services is essential. This includes training staff to understand and assist with various disabilities effectively, ensuring that services like communication, booking, and customer support accommodate all travelers. Key aspects such as clarity in signage, availability of auditory aids for those with hearing impairments, and sensitivity in personal interactions help create a welcoming environment for everyone.

Technological Accessibility: Leveraging technology to aid travel experiences benefits all travelers. Ensuring that digital platforms, including websites and mobile apps, are accessible to all. Features like screen reader compatibility, text-to-speech functions, and user-friendly navigation cater to a wide range of physical and sensory abilities.

Implementation

Staff Training: Comprehensive training programs for staff to enhance understanding of the needs of travelers with disability and the specific requirements of Muslim travelers. This includes sensitivity training and practical training on assisting with mobility aids or dietary requirements.

Community Engagement: Involving local communities in the planning stages of travel products and services to ensure these offerings are truly reflective of their needs. Feedback and continuous dialogue with these communities can guide service improvements and innovations.

Policy and Regulation Compliance: Ensuring all services comply with national and international standards for accessibility and Halal assurance, maintaining rigorous standards to guarantee these services meet legal and ethical requirements.

Travel Stages

Ensuring inclusivity and accessibility throughout the entire travel experience. During the **planning stage**, to provide accessible information on websites and booking platforms, offer pre-trip consultations, and provide information detailing accessible amenities. **On the trip**, ensuring all on-site services and facilities, including prayer spaces and Halal food options, are fully accessible. Staff are trained in cultural sensitivity and accessibility, and real-time support is available through technology to help travelers navigate and access necessary services. **After the trip**, gather feedback from travelers to continuously improve services and offers post-trip support to address any issues.

Accessibility Considerations for Mosques, Prayer Rooms and Ablution Facilities

The availability of prayer facilities is a “Need to Have” faith-based need in CrescentRating’s “Faith-based Services Needs of Muslim Travelers” model. Ensuring accessibility to mosques and ablution facilities is crucial for destinations aiming to attract and accommodate Muslim travelers. As the number of Muslim travelers, including women, elderly individuals, and those with physical disabilities, continues to grow, it becomes essential for destinations to provide inclusive and accessible facilities. Here are key considerations that destinations need to address:

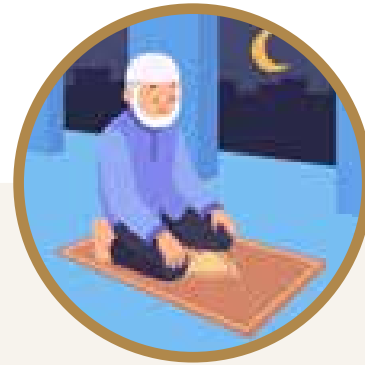


Female Prayer Sections and Ablution Areas

As more Muslim females are traveling, it is essential to provide dedicated facilities for them within mosques. This includes:

Separate Prayer Areas: Designated prayer sections for women, ensuring privacy and comfort.

Ablution Areas: Separate ablution (wudu) areas for women, equipped with adequate facilities to perform the ritual cleansing before prayers.



Accessibility Features at Mosques for the Elderly and Physically Disabled

To accommodate the needs of elderly and those with physical disabilities, mosques should incorporate accessibility features such as:

Easy Access to Prayer Halls: Ramps, elevators, and wide doorways to ensure easy access to the prayer hall for those with mobility impairments.

Accessible Ablution and Toilet Facilities: Ablution areas and toilets equipped with handrails, non-slip flooring, and space for maneuvering wheelchairs.



Washroom Facilities for Ablution (Wudu)

Proper washroom facilities are essential for performing ablution (wudu), which is a prerequisite for Muslim prayers. Destinations could consider having the following facilities near prayer rooms:

Low Sinks: Installing low sinks or dedicated foot-washing stations to facilitate the washing of feet, especially for the elderly who may find it difficult to use high sinks.

Foot Washing Areas: Designated areas within washrooms specifically designed for wudu, ensuring they are clean and well-maintained.

Accessible Travel Best Practices - Australia



Low Vision
Accredited Business



Wheelchairs & Scooters
Accredited Business



Low Hearing
Accredited Business



Limited Mobility
Accredited Business



Cognitive /Autism
Accredited Business

Accessible tourism in Australia is a dedicated effort to ensure that tourist destinations, products, and services are accessible to all individuals, regardless of their physical limitations, disabilities, or age. This inclusivity extends to a wide range of people with access requirements, including those with young children in prams, seniors with mobility needs, and individuals with permanent or temporary disabilities affecting physical/mobility, hearing, vision, and/or cognitive functions. Australia's commitment to accessible tourism is evident in its policies and legislation, such as the Disability Discrimination Act 1992, which protects people with disabilities from discrimination and mandates reasonable adjustments to reduce barriers.

Australia's Disability Strategy 2021-2031 focuses on driving action at all levels of government to improve the lives of people with disabilities, including making holiday travel more accessible. The destination offers a wealth of resources and contacts to support accessible tourism, including online accessibility assessments and guides provided by Quality Tourism Australia in partnership with Spinal Life Australia. Other resources like PhotoAbility, Push Adventures, and Sydney for All offer inclusive tourism information, ensuring that businesses and attractions are accessible to a wider range of visitors.

For travelers with specific mobility needs, Australia provides various accessible transportation options across the destination, including railways, buses, and ferries equipped with features like wide aisles and ramp access. The destination also offers accessible accommodation options and a wide range of accessible experiences, from wheelchair-accessible trails to inclusive tours and activities. Australia's dedication to accessible tourism is further demonstrated through initiatives like the Hidden Disabilities Sunflower program at airports and the provision of Auslan (Australian Sign Language) interpreters and sensory-friendly attractions for visitors with sensory impairments.

Image Source: <https://www.qualitytourismaustralia.com/home/accessible-tourism/>

Accessible Travel Best Practices - UAE (Dubai)



Image Source: <https://www.dewa.gov.ae/en/about-us/pod/pod-services>

Dubai exemplifies best practices in accessible tourism by ensuring comprehensive services for travelers with special needs across its transportation hubs, accommodations, and attractions. Dubai International Airport and the cruise terminal at Mina Rashid offer tailored facilities such as dedicated check-in areas, accessible washrooms, and mobility aids. Public transportation is equally inclusive, featuring accessible buses and taxis, and the Dubai Metro with its advanced features for mobility and sensory impairments.

Some of the accommodations in Dubai are designed with accessibility in mind, providing spacious guest rooms, roll-in showers, and seamless access to various facilities. Hotels have enhanced their offerings to better serve guests with restricted mobility. Similarly, Dubai’s diverse attractions, from theme parks to cultural sites, are improving accessibility, ensuring that assistance is always available for visitors requiring additional support.

The city’s forward-thinking approach to inclusivity extends to the Dubai Metro and alternative transport options like water taxis, which are equipped with necessary adaptations for people of determination. This comprehensive accessibility strategy not only enhances the travel experience for all but also positions Dubai as a leading destination in promoting accessible travel globally.



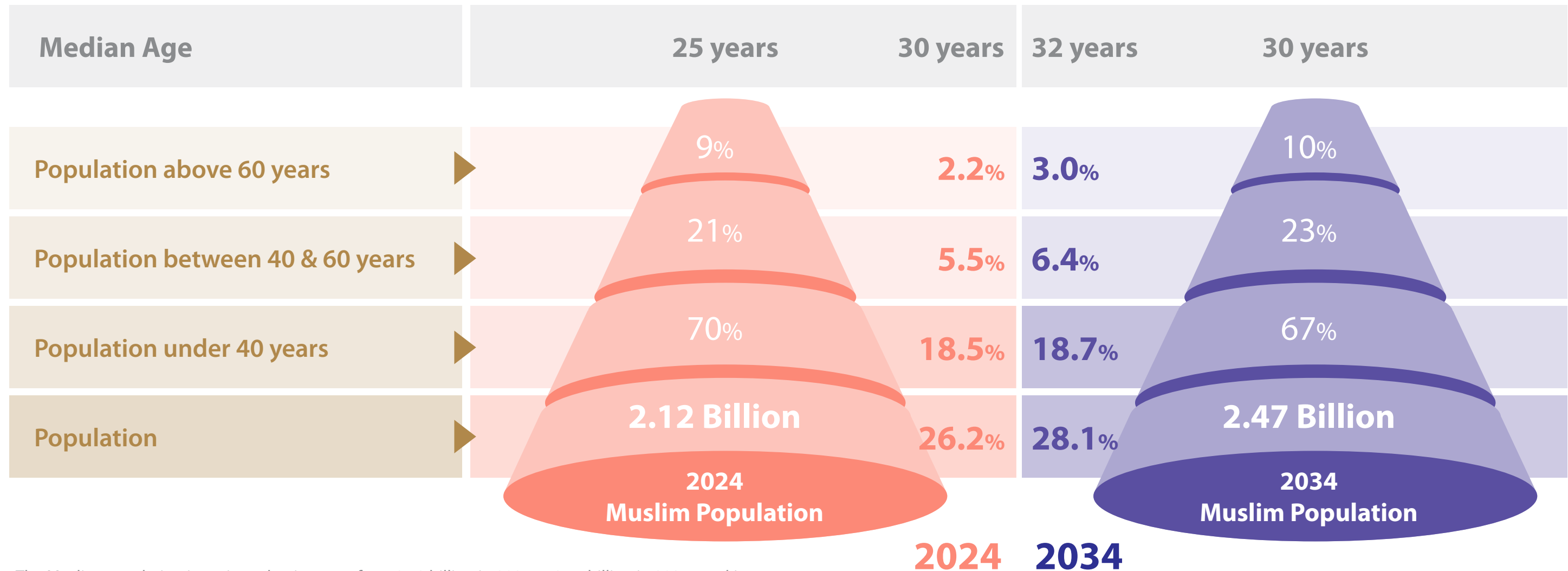
Image Source: <https://hdsunflower.com/uk/insights/post/air-travel-for-all>

05

Muslim Demographics & Travel Market Economy



Navigating the Future: A Demographic Overview of the Muslim Population



Percentage of the Global Population

The Muslim population is projected to increase from 2.12 billion in 2024 to 2.47 billion in 2034, marking a significant growth of 0.35 billion over a decade, which represents 50% of the increase of the global population during that period. Its share of the global population is also expected to rise. In 2024, Muslims make up 26.2% of the global population, and by 2034, this share is projected to increase to 28.1%. The population under 40 years old remains the largest segment of the Muslim population, although it is expected to decrease slightly from 70% in 2024 to 67% in 2034. They account for 18% of the global population in 2024, and this is projected to grow to 19% by 2034.

Age Dynamics: Analyzing Trends in the Muslim and Rest of World Populations

Population Distribution

In 2024, the largest segments in the Muslim demographic are the 0-10 and 11-20 age groups, suggesting a high youth population. The rest of the world is notably older, with significant populations extending into the 31-40 and 51-60 age groups.

By 2034, the Muslim population will experience substantial increases in the middle age groups (21-30 and 31-40), which are key travel demographic segments due to their economic activity and travel propensity.

The rest of the world population shows a decrease in younger age groups (0-10, 11-20 and 31-40) and a larger increases in older age groups (61-70 and 71-80), which may influence different types of travel demands, such as health or leisure-oriented travel.

Implications for the Travel Industry

Youthful Market: The relatively younger Muslim population represents a dynamic market for the travel industry, emphasizing the need for destinations to cater to families and younger travelers with appropriate services and attractions.

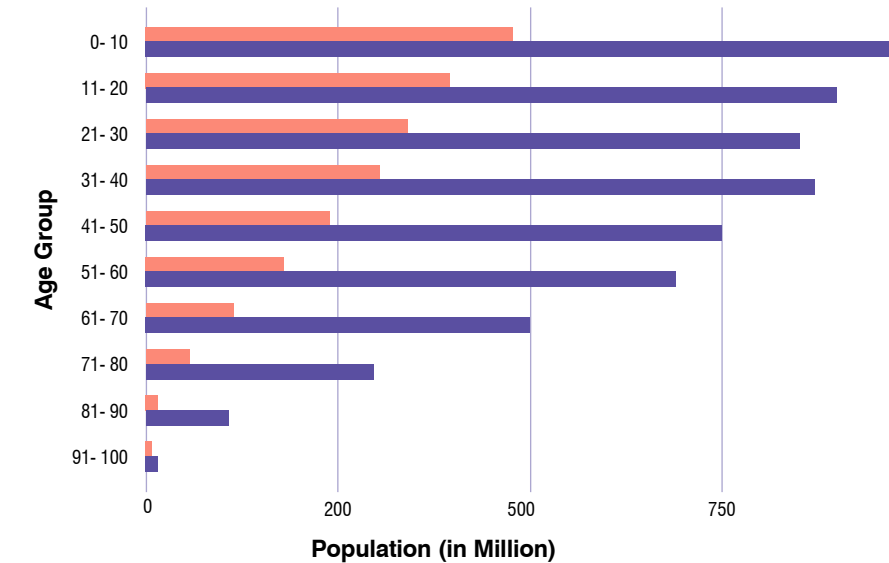
Family-Oriented Travel: Given the large young population, family-oriented travel solutions, such as family-friendly accommodations, attractions, and educational travel experiences, will be increasingly important.

Growth in Working-Age Travelers: The projected increase in the Muslim population within the 21-40 age range by 2034 highlights a growing segment of independent and economically active travelers. This group is likely to seek diverse travel experiences, from leisure to business opportunities.

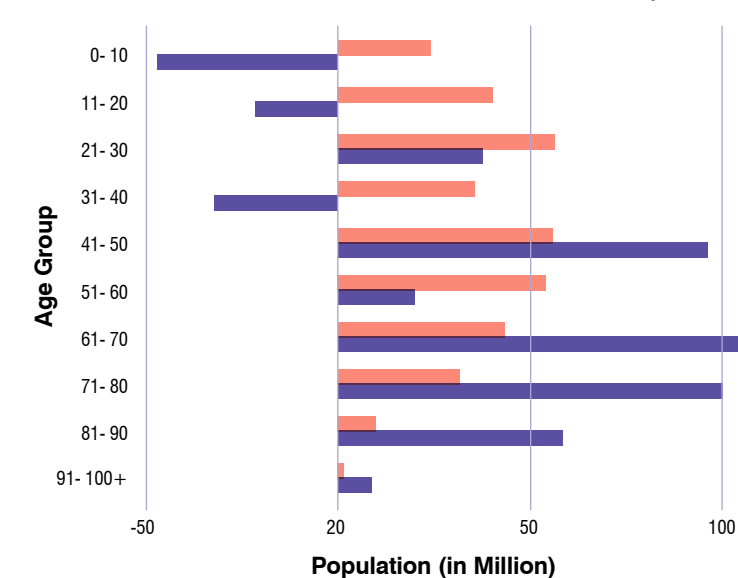
Cultural and Heritage Tourism: The interest in cultural and heritage tourism is likely to grow, particularly as younger Muslim travelers seek connections with their heritage and cultural identity through travel.

Technological Adaptations: With the increase in younger demographics, the integration of technology in travel services, including digital booking systems, mobile apps for on-the-go travel management, and virtual tours, will become even more crucial.

Population by Age Group (2024)



Increase / Decrease of Population by Age Group (2024 to 2034)



Muslim Population

Rest of the World Population

Economy and Muslim Population: A Comparative Analysis of OIC Economies

Saudi Arabia & United Arab Emirates

Saudi Arabia and UAE rank among the top 10 OIC economies across three pivotal economic indicators: Total GDP, Households with Income greater than USD 250K, and GDP per Capita. This positioning underscores their status as one of the affluent Muslim outbound markets.

Turkiye

Turkiye stands out as the only economy within the OIC to rank in the top 10 across all four key economic and demographic categories. This unique positioning underscores Turkiye's significant role as both a source and destination in the global travel market.

Kuwait, Malaysia & Qatar

Qatar, Kuwait, and Malaysia each hold prominent positions in the top 10 rankings for both households with income greater than USD 250K and GDP per capita, underscoring their significant economic stature of their populations. They exemplify the robust potential for growth in the travel sector.

Bangladesh, Egypt, Indonesia, Iran, Nigeria and Pakistan

They represent significant potential within the Muslim travel market, standing out with their large Muslim populations and growing middle-class. These economies, with their presence in the top 10 rankings for Muslim population and total GDP, are pivotal players in both inbound and outbound travel sectors. Except for Nigeria, all other 5 economies also feature in the top 10 by Households with Income greater than USD 250K.

Top 10 OIC Economies (2023)

Countries	By GDP per Capita	By Total GDP	By Muslim Population	By no. of Households with Income higher than USD 250K
Algeria			8	
Bahrain	5			
Bangladesh		5	3	10
Brunei	4			
Egypt		6	5	7
Indonesia		1	1	4
Iran		8	6	2
Iraq			10	
Kazakhstan	9	10		
Kuwait	3			10
Malaysia	10			6
Nigeria		7	4	
Oman	7			
Pakistan		9	2	9
Qatar	1			8
Saudi Arabia	6	3		1
Sudan			9	
Turkiye	8	2	7	3
United Arab Emirates	2	4		5

Resurgence and Growth in the Muslim Travel Market

The Muslim travel market has shown remarkable resilience and recovery following the global disruptions caused by the pandemic. The trajectory of recovery and growth highlights the sector's vitality and the increasing significance of Muslim travelers in the global tourism landscape.

Recovery Trends: In 2022, total Muslim international arrivals reached 110 million, representing 68% of the pre-pandemic levels seen in 2019. This significant rebound signaled a strong desire and readiness among Muslim travelers to resume international travel as global restrictions eased. The recovery continued to gain momentum in 2023, with Muslim international arrivals climbing to 145 million. This figure constitutes 90% of the 2019 arrivals, underscoring a swift return to near pre-pandemic activity levels.

Future Projections: The year 2024 is projected to be a milestone for the Muslim travel market, with expected arrivals to not only recover to pre-pandemic levels but to exceed them by 3 to 5%, reaching an estimated 164 to 168 million arrivals. Looking further ahead, by 2028, the market is expected to grow substantially,

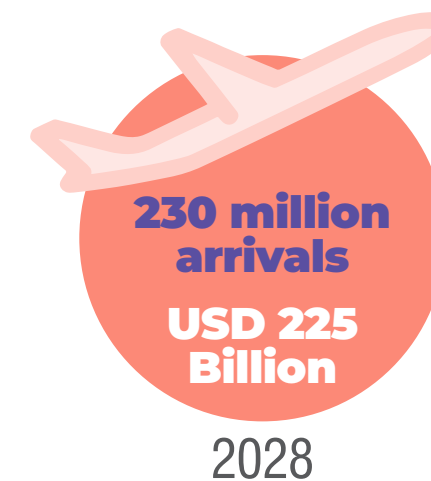
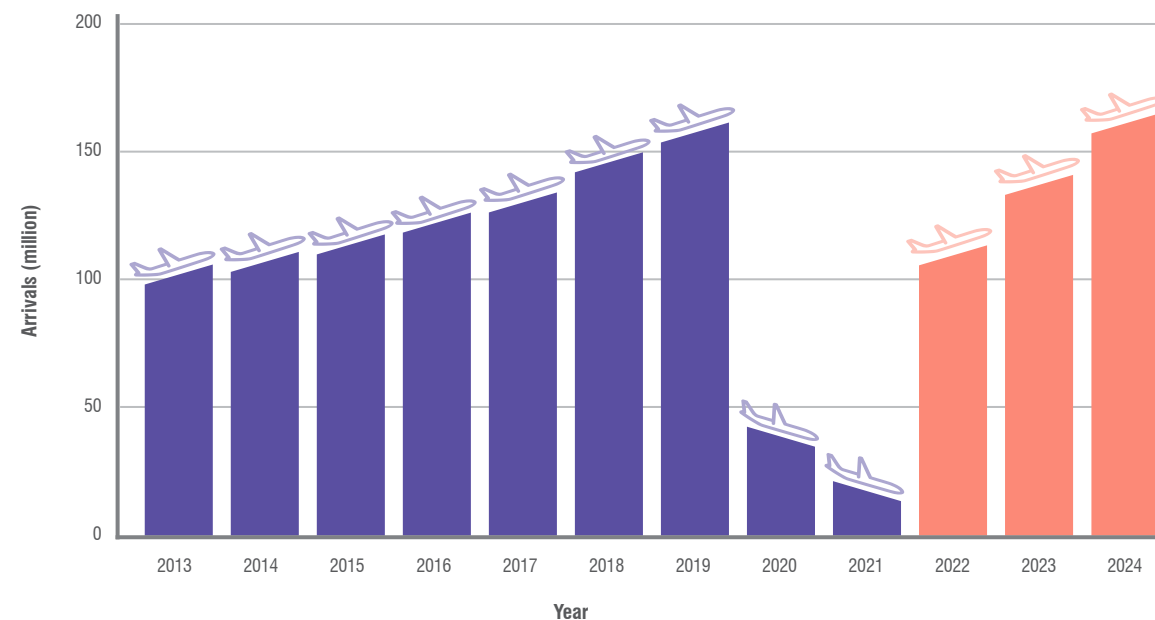
with Muslim international arrivals projected to reach 230 million. This growth will be accompanied by an estimated expenditure of USD 225 billion, reflecting the increasing economic impact of Muslim travelers.

Market Drivers:

Demographic and Economic Growth: Key factors contributing to this robust growth include the demographic expansions in Muslim-majority countries and rising disposable incomes, which enhance travel affordability and accessibility.

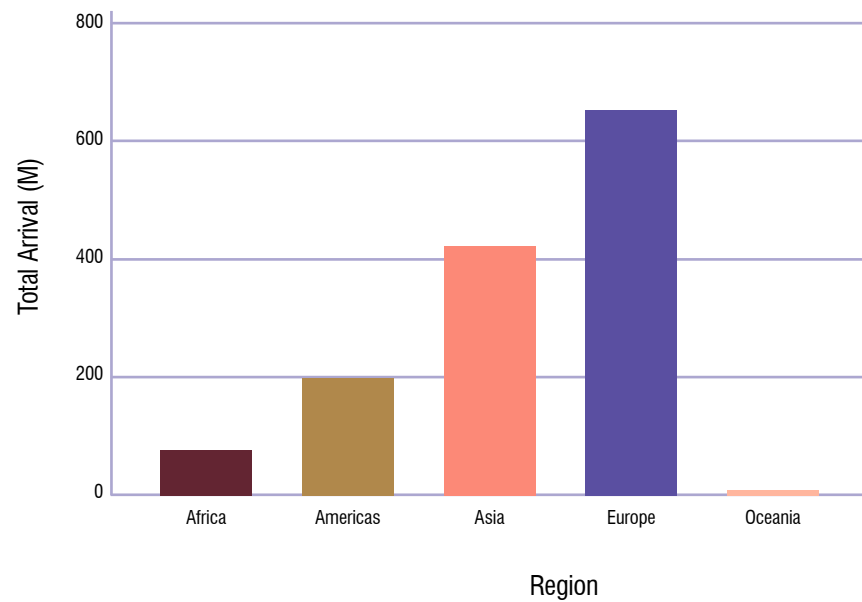
Cultural and Halal Tourism Development: There is a growing recognition of the unique needs of Muslim travelers, leading to more destinations catering to this market with halal food services, prayer facilities, and culturally respectful environments.

Technological Advancements: Innovations in travel technology, including mobile applications and online platforms tailored to the Muslim market, are making travel more accessible and appealing by aligning with the values and preferences of Muslim consumers.

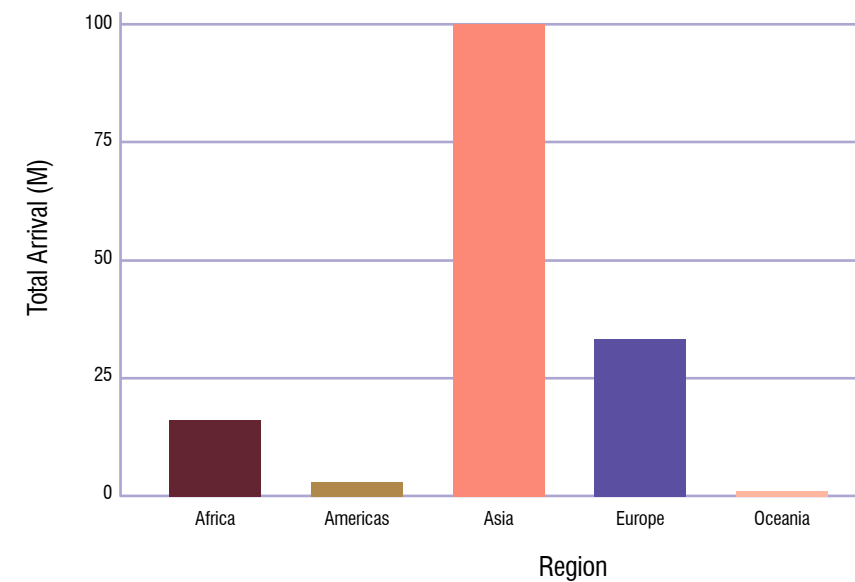


Comparative Analysis: Global and Muslim Travel Arrivals by Region compare vs 2023

Total Arrivals by Region



Muslim Arrivals by Region



In terms of Muslim arrivals, Asia remains a leading destination, with over 65% of Muslim travelers choosing this region. This figure underscores Asia's continued dominance among Muslim travelers. Several factors contributed to this trend, including Asia's extensive Muslim population, the availability of numerous Muslim-friendly travel options, and post-pandemic shifts towards closer destinations due to rising airfares.

Europe, which has the highest number of global arrivals, reports as a second largest proportion of Muslim arrivals at approximately 22%. Europe hosts many popular destinations and holds potentials for improving Muslim-friendly amenities and services, such as halal food options and prayer facilities to attract more Muslim tourists.

Africa's share of Muslim arrivals stands at 10% despite being the second lowest in total arrivals. This indicates that Africa remains a vital destination for Muslim travelers, likely due to its rich cultural diversity, historical Islamic heritage, and large Muslim populations, particularly in North Africa.

The Americas have a smaller proportion of Muslim travelers, accounting for 3% of total arrivals. This low figure is likely due to factors such as geographical distance, higher travel costs, and a perceived lack of Muslim-friendly facilities and services. However, this also presents a significant opportunity for growth. By addressing these barriers and enhancing the appeal of destinations within the Americas to Muslim travelers, there is potential to attract a larger share of this growing market.

Oceania, with the fewest global arrivals, also has the smallest share of Muslim travelers, accounting for around 1%. This figure is predictable given Oceania's geographical distance from many Muslim-majority countries. Nevertheless, this also suggests that there is a substantial growth opportunity for Oceania to capture the Muslim travel market.

Overall, the Muslim travel arrivals continue to be predominantly directed towards Asia, in contrast to global travelers who show preference for Europe.

HalalTrip Muslim Travel Intent Tracker (April 2023 - March 2024)

The HalalTrip Muslim Travel Intent Tracker (MTIT) is a metric developed by HalalTrip to monitor the travel intentions of Muslim travelers continuously. This tool tracks changes in travel plans ranging from the immediate to those planned over a year in advance, providing insights into the dynamic preferences of the Muslim travel market.

Functionality and Impact: The MTIT is updated monthly, allowing businesses and destinations to stay abreast of current trends, anticipate future demands, and pinpoint growth opportunities within the Muslim travel sector. The MTIT score is calculated using an algorithm that assigns weights to different time frames, reflecting the immediacy and distance of future travel plans.

Analysis of MTIT Scores from April 2023 to March 2024:

Spring to Summer 2023: Starting in April 2023 with a score of 76.4, the MTIT gradually increased through the summer, peaking at 82.7 in July 2023. This rise indicates a robust intent to travel during the summer months, driven by favorable weather conditions and the easing of travel restrictions in many destinations.

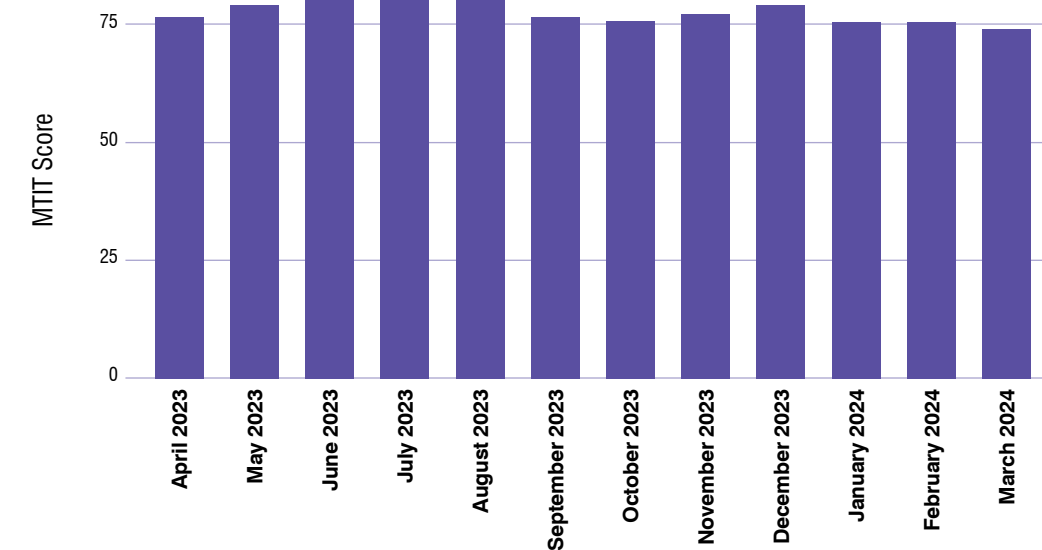
Autumn 2023: Post-summer, the intent slightly declined, stabilizing around the mid-70s in the autumn months, with October 2023 registering a score of 75.7. This period typically sees a dip as travelers return to work or school, but the scores suggest a sustained, though moderate, interest in travel.

Winter 2023 to Early 2024: The intent showed a slight uptick during the end-of-year holidays, with December 2023 scoring 79.2, reflecting holiday travel and winter vacations. However, this enthusiasm tapered off in the new year, with January 2024 dropping to 76.1 and declining to 74.1 by March 2024.

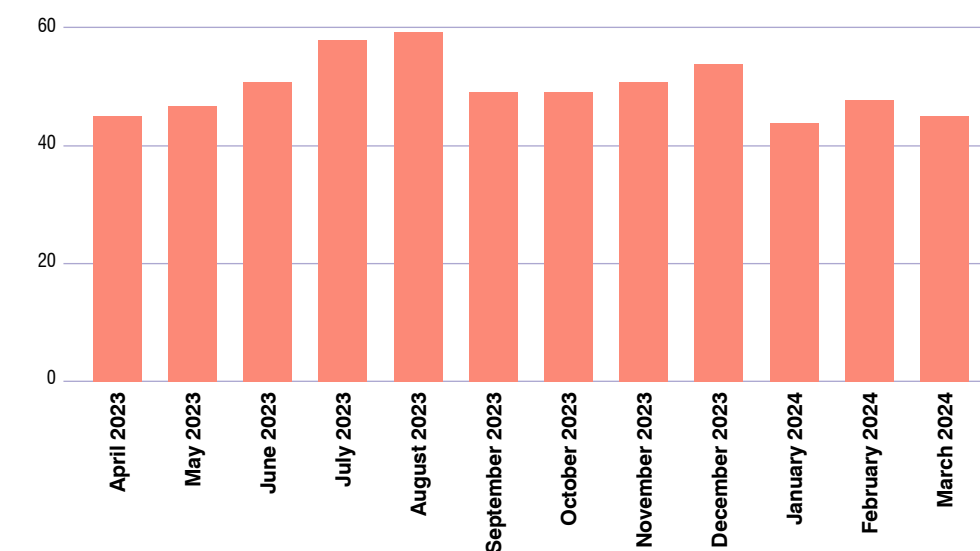
The detailed monthly MTIT insights are published on Halaltrip.com.



MTIT Score April 2023 - March 2024

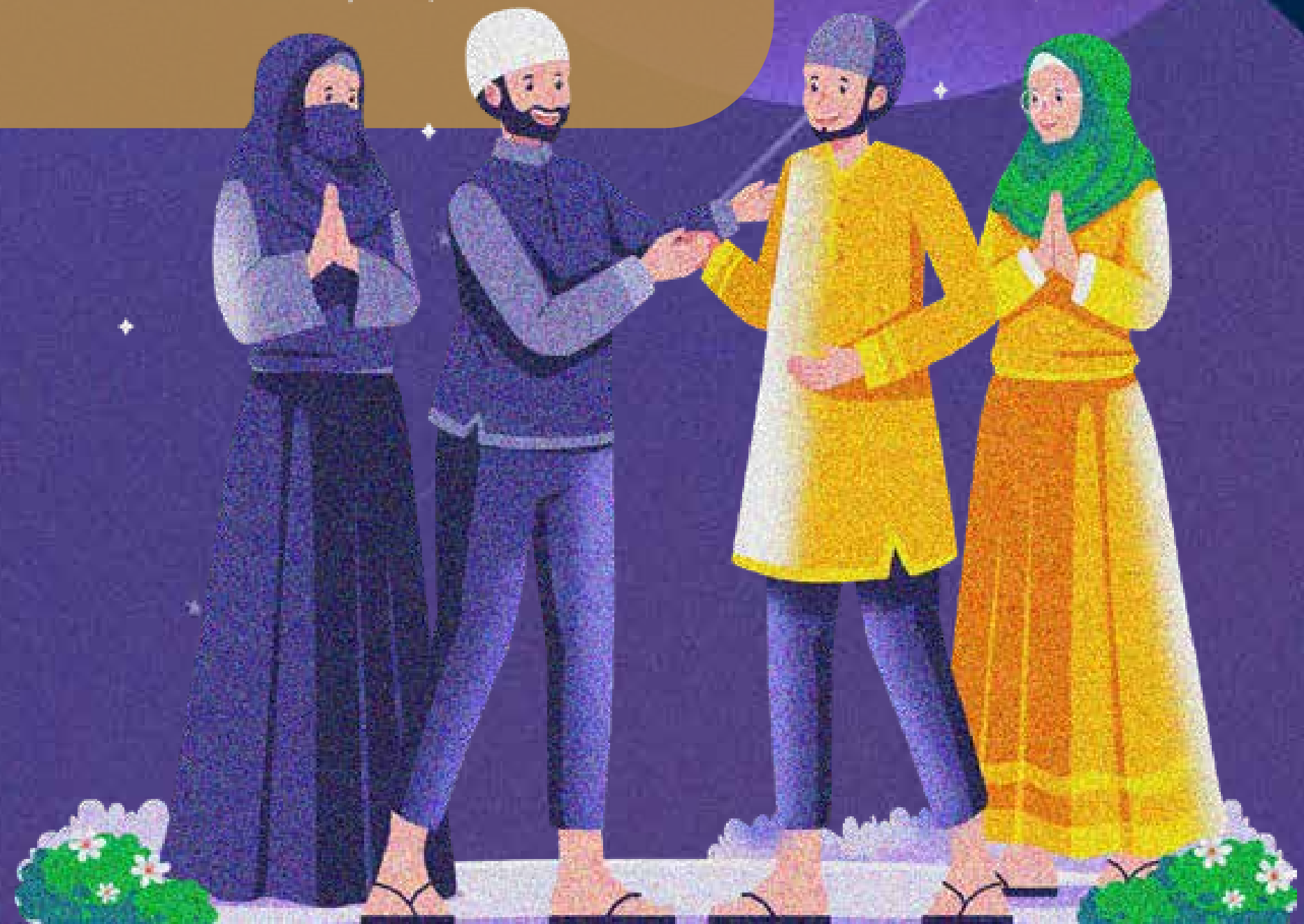


Travel Intent - Within the Month



06

GMTI 2024 Overview



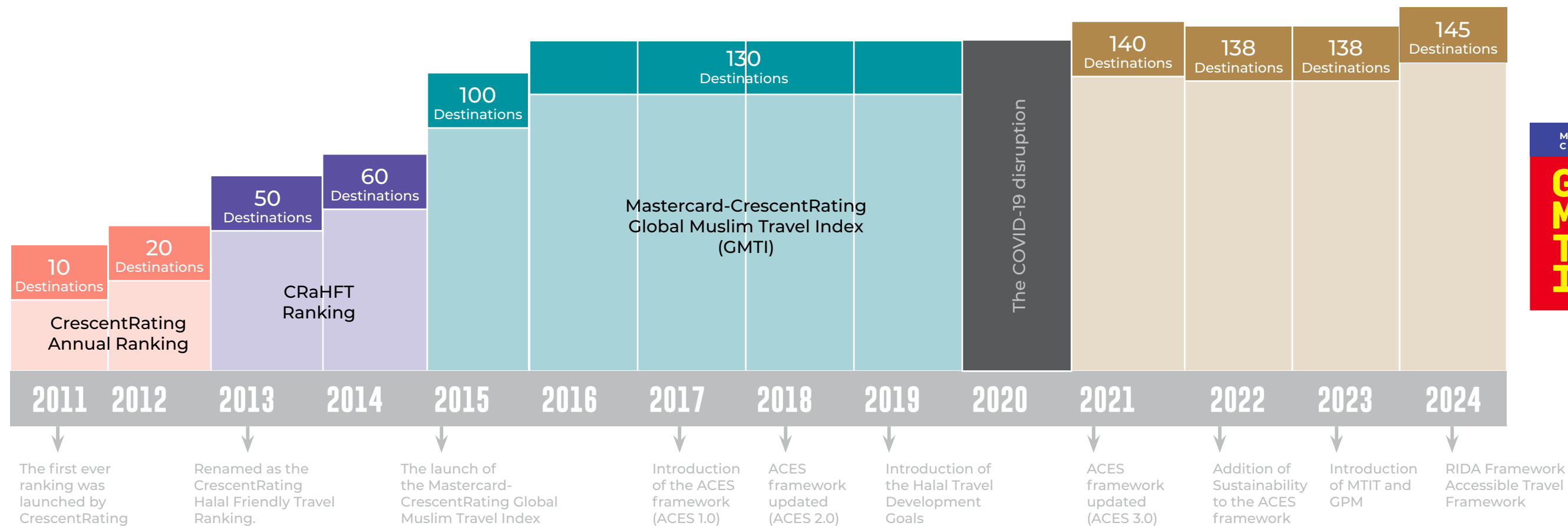
GMTI 2024: Evolving with the Times - Embracing responsible tourism

The Mastercard-Crescentrating Global Muslim Travel Index (GMTI) continues its trajectory of evolution and expansion, reflecting the changes and growth within the Muslim travel market. Since its inception in 2011 as the CrescentRating Annual Ranking, assessing only the top 10 Muslim-friendly destinations, it has steadily expanded its scope and depth of analysis to cater to the diverse needs of Muslim travelers globally.

This year, recognizing the importance of inclusivity in travel, the GMTI has integrated the Accessible Travel metrics for the first time. This will begin to assess how well destinations accommodate travelers with disabilities, ensuring that travel is accessible to all, including

elderly travelers and those with specific needs. This inclusion underscores the commitment to making Muslim travel more inclusive and accessible globally.

The number of destinations evaluated has also increased to 145 this year, reflecting the growing interest and recognition of the Muslim travel market. This expansion not only broadens the scope of the GMTI but also provides deeper insights and more comprehensive data that stakeholders in the travel industry can utilize to enhance their offerings and services.



GMTI Through the Years: A Visual Journey and Impact Showcase



+30,000
Downloads
(YoY* 55%)



+33,000
online article
mentions



+2,400
citations
in academic
articles

+7,000 news
media mentions
(YoY* 58%)



ACES 3.0 Framework

The CrescentRating ACES model, established in 2017, evaluates destinations' Muslim-friendliness in four areas.

Access: Ease of access to the destination.

Communication: Internal and external communication by the destination.

Environment: The overall environment and setting of the destination.

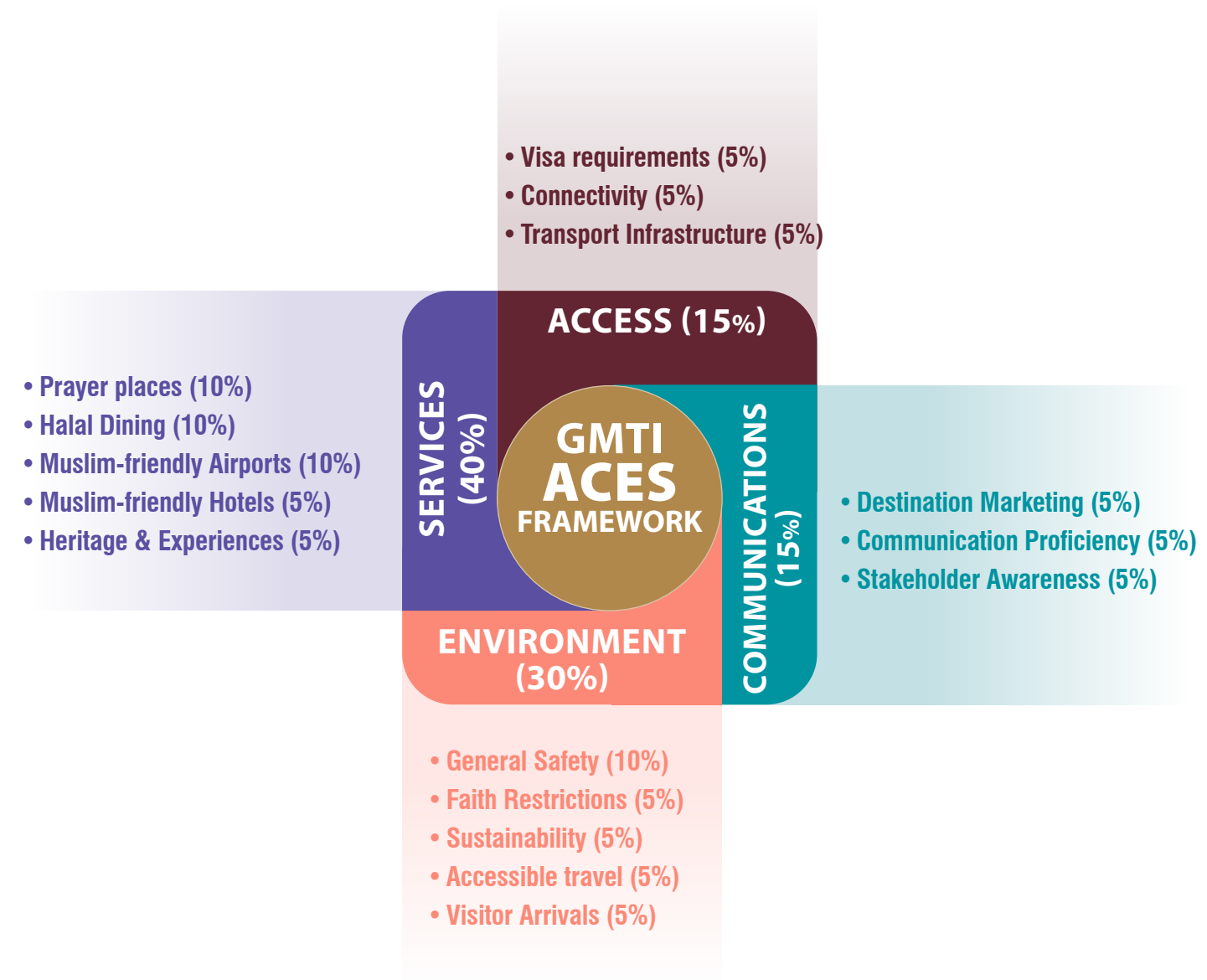
Services: The range of services provided by the destination to cater to the needs of Muslim travelers.

Each of these four key areas is assessed using quantitative measurements across several criteria, and each criterion score is derived using several sub-criteria. More than 50 data sets are used to compile the GMTI scores based on the ACES 3.0 model.

Framework Evolution: Since 2017, the criteria and sub-criteria have evolved to keep pace with the development of the Muslim travel market, taking into account overall trends in the travel and lifestyle space. This year's model enhancement builds on last year's initiatives by destinations to drive sustainable tourism.

Metrics Evolution: This year's model has introduced new metrics to evaluate accessible travel for Muslim travelers. These metrics assess the availability of facilities and services for travelers with disabilities, and other special needs. By integrating accessibility with responsible tourism, the GMTI scores offer a more comprehensive assessment for the Muslim Travel Market. The "Enabling Climate" metrics has been discontinued.

Weightage Evolution: The criteria's weightages have been adjusted. Out of the 16 criteria evaluated, four have a weightage of 10% each, while twelve have a weightage of 5% each. These criteria collectively contribute significantly to the overall evaluation and offer a detailed understanding of each destination's performance. This unified approach to weightages ensures that all relevant aspects are adequately considered, providing a comprehensive evaluation of destinations based on the ACES framework.



ACES criteria overview - Access & Communication

Access

The Access criteria evaluate the accessibility of a destination from the top 30 Muslim travel outbound markets. This assessment includes:

Connectivity: Air Connectivity: Evaluates the availability of direct flights between the destination and key Muslim outbound markets.

Distance: The geographical proximity of the destination is taken into account, recognizing that shorter distances contribute to easier access.

Land Connectivity: Land connectivity is assessed by considering the land borders to the top Muslim outbound markets. Direct land connectivity is considered to contribute to easier access.

Visa Requirements: Assesses the ease of obtaining visas for travelers from the top Muslim outbound markets, considering the types of visas available and specific provisions for them.

Transport Infrastructure: Refers to the accessibility, convenience, and ease of travel within the destination, considering the quality, efficiency, and variety of available transport options.

By considering these factors, the Access criteria provide insights into the accessibility of a destination for Muslim travelers, helping destinations identify areas for improvement.

Communication

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

Communication Proficiency: Evaluates the destination's proficiency in communicating in the top 10 languages spoken by Muslim travelers, including English, Arabic, Bahasa, Melayu, Urdu, Turkish, Russian, French, Persian, and German.

Destination Marketing: Examines how the destination promotes Muslim-friendly services and facilities to attract Muslim travelers. This includes evaluating the availability of comprehensive information on websites, dedicated Halal travel guides, media mentions, and promotional campaigns highlighting the destination's Muslim-friendly offerings.

Stakeholder Awareness: Assesses the level of understanding among stakeholders regarding the needs and preferences of Muslim travelers. This includes factors such as the percentage of the Muslim population in the destination, hosting of Halal conferences or events, and other stakeholder education initiatives.

By considering these factors, the Communication criteria offer insights into a destination's communication capabilities, marketing strategies, and stakeholder awareness related to Muslim-friendly travel. This helps destinations enhance their communication efforts and improve their appeal to Muslim travelers.

ACES criteria overview - Environment & Services

Environment

The Environment category evaluates a destination's overall atmosphere and conditions in relation to its appeal and suitability for Muslim travelers. This assessment includes:

General Safety: Evaluates the destination's safety in terms of hate crimes and overall security, ensuring a peaceful environment where Muslim travelers can enjoy their visit without concerns for their well-being.

Faith Restrictions: This evaluation examines any restrictions or limitations imposed on Muslims, such as dress code restrictions for Muslim females. It assesses how such restrictions affect Muslim travelers' overall experience and perception of the destination.

Muslim Visitor Arrivals: It considers the volume of Muslim travelers visiting the destination, reflecting the level of appeal and suitability of the environment for this specific group.

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

Accessible Travel: This year's assessment incorporates a new focus on accessible travel, evaluating convenient access to public transport and open spaces for public use.

By considering these factors, the Environment pillar offers insights into a destination's overall environment and conditions as they relate to Muslim travelers.

Services

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

Availability of Prayer Places and Mosques: 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: Examines the availability of Halal dining options within the destination. This includes the presence of restaurants and food establishments that offer Halal-certified food or Halal-assured menus, accommodating the dietary requirements of Muslim travelers.

Muslim-Friendly Airports: Evaluates the level of Muslim-friendliness of airports within the destination. This includes the availability of prayer rooms, ablution facilities, and Halal food options at the airport.

Muslim-Friendly Accommodation: Assesses the availability of Muslim-friendly accommodation options. This includes 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: Examines the availability of heritage experiences and attractions significant to Muslim travelers. This includes historical sites, cultural landmarks, and attractions that showcase the destination's rich heritage and Islamic history.

By evaluating these factors, the Services criteria provide insights into the availability and quality of services that enhance the travel experience for Muslim travelers.

145 Destinations ranked

The Global Muslim Travel Index continues to expand its coverage to reflect the growing diversity in travel destinations, striving to provide an inclusive and comprehensive view of the Muslim travel market.

This year, GMTI has expanded its evaluation to include 145 destinations, including Belize, Madagascar, Reunion, Seychelles, and Trinidad and Tobago. This inclusion further broadens the GMTI's scope, ensuring that it covers a wide range of destinations across the globe.

These destinations account for over 99% of Muslim visitor arrivals worldwide, making the GMTI a valuable tool for travelers, destinations, and stakeholders.

The GMTI is committed to keeping pace with the changing landscape of Muslim-friendly travel around the world. By covering a diverse array of destinations, it provides useful information for Muslim travelers on destinations that meet their unique needs, as well as for destinations and stakeholders on how to promote inclusivity in the travel industry. This year's expanded coverage highlights GMTI's dedication to inclusivity and its efforts to provide comprehensive insights into the global Muslim travel market.

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

07

GMTI 2024 Results

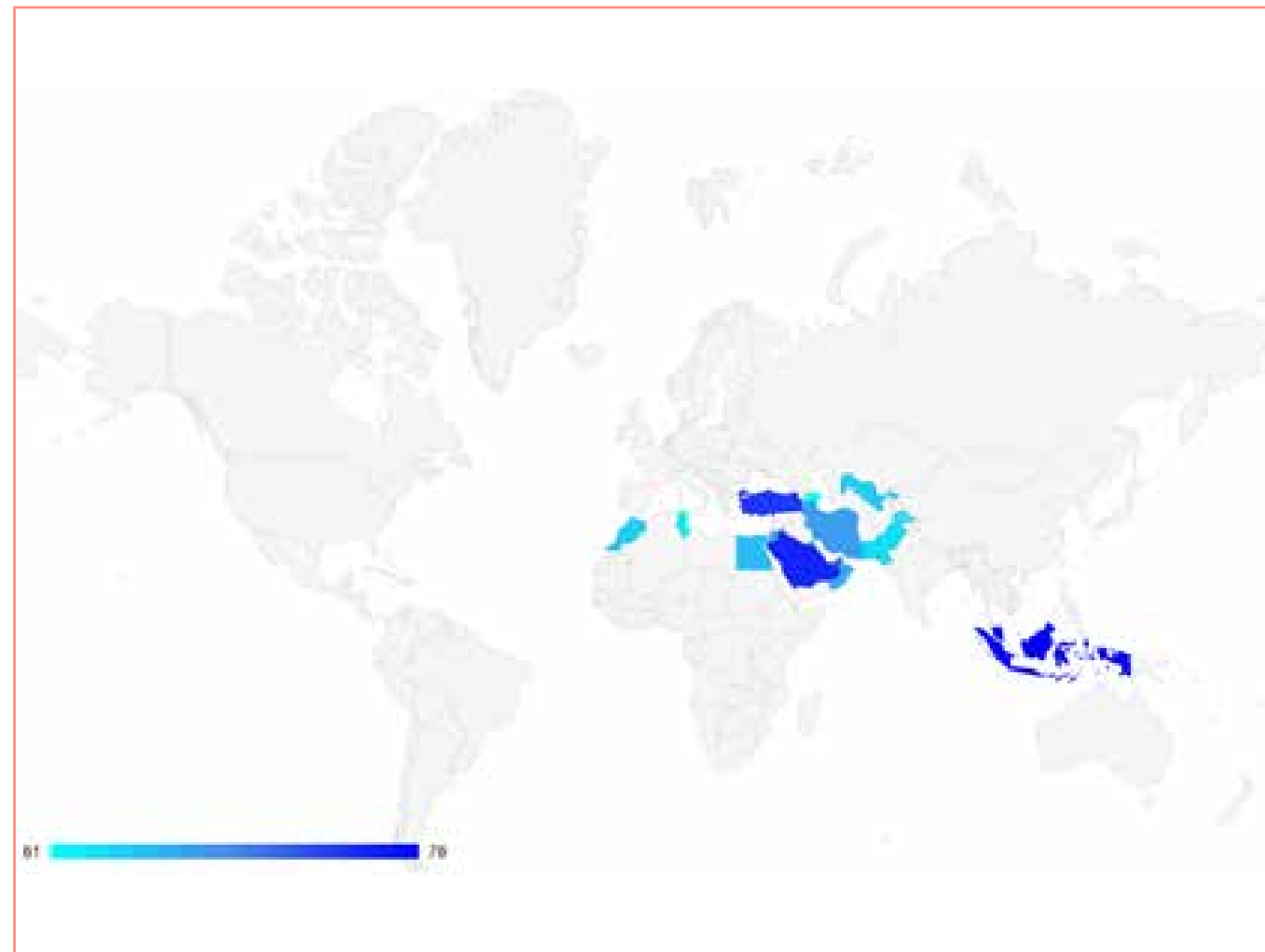


GMTI 2024 Rankings - Top 20 Destinations

The Global Muslim Travel Index (GMTI) for 2024 reveals a significant improvement in the accommodation of Muslim travelers, with the average score of the destinations increasing by almost 10%. This indicates that more destinations are becoming increasingly Muslim-friendly. Additionally, the average score of the top 20 destinations has risen by more than 3%, reflecting a focused effort on the part of these destinations to cater to the needs of Muslim tourists.

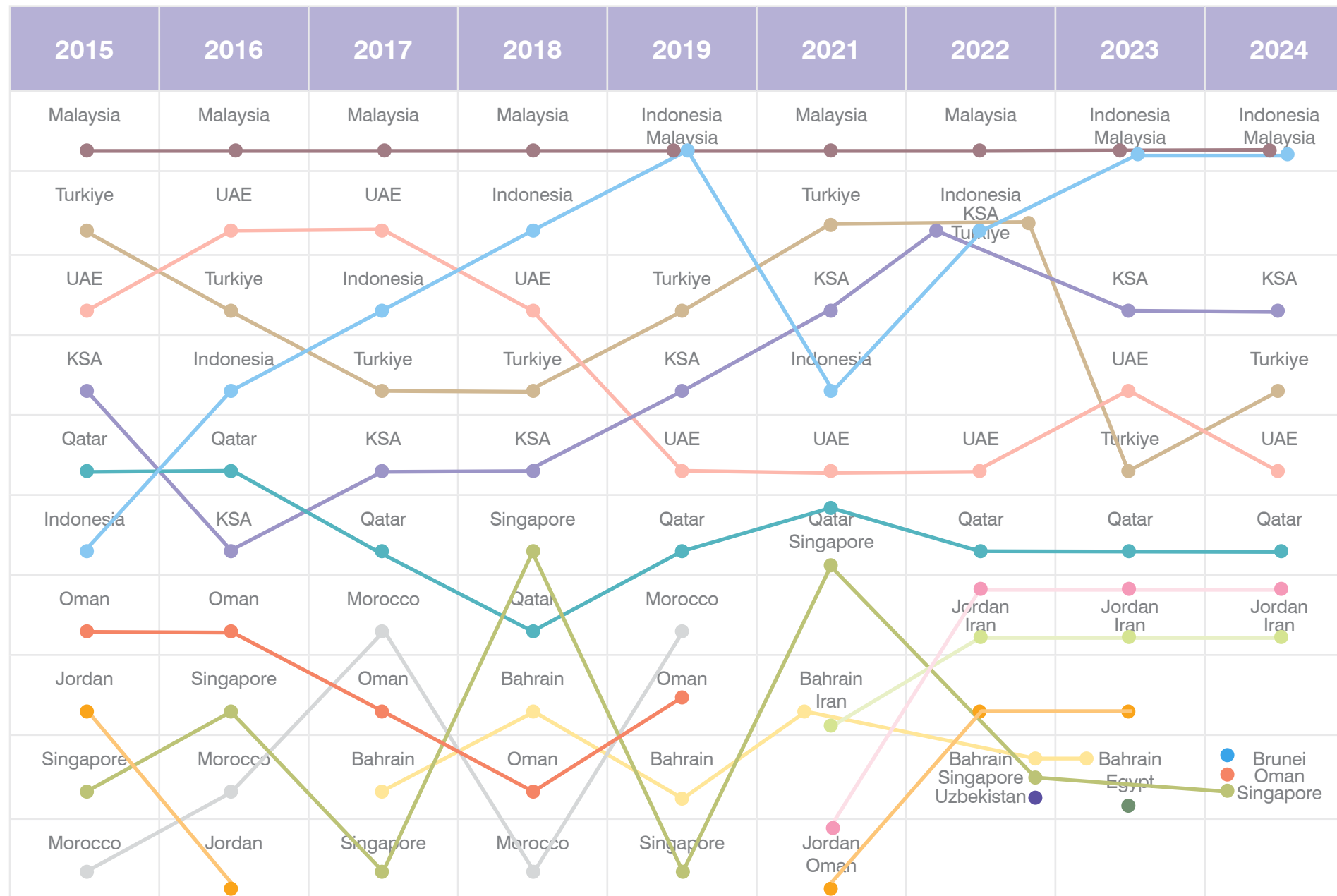
Both Indonesia and Malaysia retain their joint top position with a score of 76, each showing an improvement of 3 points from 2023. Their consistent focus on enhancing Muslim-friendly travel facilities, including widespread availability of Halal food, extensive prayer facilities, and dedicated tourism services, has maintained their leadership in the index. Saudi Arabia remains a strong contender with a score of 74, improving by 2 points. The destination continues to benefit from its significant religious tourism due to the Hajj and Umrah pilgrimages and is increasingly diversifying its tourism offerings. Türkiye moves up by one position with a score increase to 73, due to its robust infrastructure for Muslim travelers and rich cultural heritage that appeals to this segment.

Although there are some changes in the rankings of some destinations, it is noteworthy that almost all destinations within the top 20 have increased their GMTI scores. This consistent improvement across the board highlights the impact that Muslim travelers are having in encouraging destinations and businesses to enhance their services to cater to Muslim travelers.



GMTI 2024 Rank	Change VS 2023	Destination	GMTI 2024 Scores	Change Vs 2023
1	0	Indonesia	76	+3
1	0	Malaysia	76	+3
3	0	Saudi Arabia	74	+2
4	+1	Türkiye	73	+3
5	-1	United Arab Emirates (UAE)	72	+1
6	0	Qatar	71	+1
7	0	Iran	67	+1
7	0	Jordan	67	+1
9	+6	Brunei	66	+4
9	+4	Oman	66	+3
9	+2	Singapore	66	+2
12	-3	Egypt	65	0
12	-1	Kuwait	65	+1
14	+9	Maldives	64	+7
14	-1	Uzbekistan	64	+1
14	+3	Morocco	64	+4
17	-8	Bahrain	63	-2
17	0	Pakistan	63	+2
19	-4	Tunisia	62	0
20	+5	Azerbaijan	61	+6

GMTI ranking trends (2015-2024): Stability and Shifts Among Top 10 Destinations



The GMTI rankings from 2015 to 2024 reveal consistent leadership and notable shifts among the top destinations for Muslim travelers. Malaysia, Indonesia, and the UAE have prominently featured in the top tiers, showcasing their enduring appeal to Muslim travelers. Malaysia and Indonesia have frequently been in the top two positions, reflecting their robust tourism infrastructures and continuous enhancements in Muslim-friendly amenities. The UAE, consistently near the top, underscores its luxury offerings and world-class facilities.

Turkiye and Saudi Arabia demonstrate strong showings, with Turkiye consistently remaining in the top five.

Qatar has shown stability in its rankings, indicating consistent service delivery and infrastructure that resonates well with Muslim travelers.

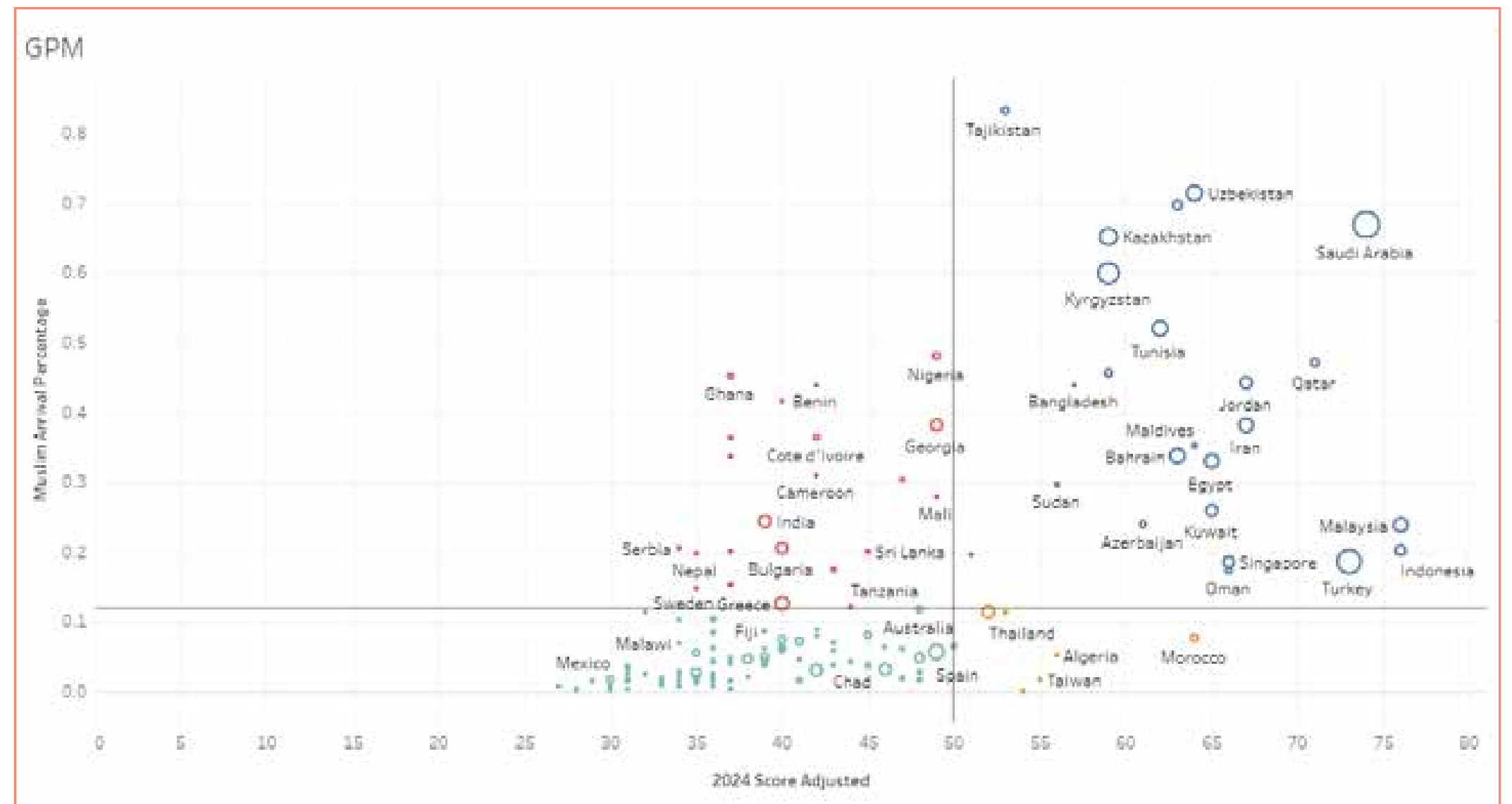
Jordan and Iran made entries into the top 10 in 2021 and have maintained their positions steadily since then. Oman, which was a top 10 destination before the pandemic, has successfully re-entered the top 10 this year.

Singapore stands out as the only non-OIC destination that has consistently remained in the top 10 of the GMTI since its inception. This remarkable achievement underscores Singapore's resilience and its comprehensive approach to catering to Muslim travelers.

GMTI Performance Matrix (GPM)

The Trailblazers quadrant consists of 26 destinations leading the way in accommodating Muslim travelers. These destinations welcomed 95 million Muslim visitors in 2023, representing about 62% of the total global Muslim arrivals. The Potential Leaders quadrant includes seven destinations that show great promise with their progressive offerings and services. These destinations attracted approximately 8.5 million Muslim travelers, accounting for 5% of the 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 attracted around 16 million Muslim visitors, accounting for 11% of total global Muslim arrivals. Lastly, the Untapped Opportunities quadrant comprises 89 destinations. Even though these destinations are under-utilized in terms of their potential to attract Muslim travelers, they still drew around 33 million Muslim visitors, representing approximately 22% of global Muslim arrivals.



Leading Muslim-friendly Destinations - OIC



Indonesia

As the destination with the highest Muslim population, Indonesia consistently shines in the GMTI, with its commitment to Muslim-friendly tourism with comprehensive facilities and services. Known for its relaxed visa policies, Indonesia allows easy entry for many international tourists, enhancing its global attractiveness.

Indonesia excels creating a welcoming environment for families. The absence of faith restrictions makes it easier for Muslim travelers. Across the archipelago, Indonesia offers a plethora of Halal dining options, catering to all dietary needs. Prayer facilities (Mushallah) are abundant and available in shopping malls, attractions, and events venues. Additionally, Indonesian airports are well-equipped with prayer rooms and Halal food services.



Malaysia

Malaysia consistently ranks as a premier destination in the GMTI, recognized for its extensive Muslim-friendly tourism infrastructure and services. The destination's visa policies facilitate easy access for numerous international visitors. Recognized for its general safety, Malaysia is an ideal destination for families and solo travelers seeking a secure environment.

Malaysia offers an extensive array of Halal dining options nationwide. Mosques are readily available as well as prayer rooms (Surau) in public, commercial, and transportation hubs. Furthermore, Malaysian airports are well-equipped with numerous prayer rooms and Halal food options, catering extensively to the needs of Muslim travelers from arrival to departure. This holistic approach to hospitality ensures a comfortable experience, for Muslim travelers.



Saudi Arabia

Saudi Arabia is emerging as a prominent leader in the GMTI, capitalizing on its unique position as the spiritual home of Islam. Like Malaysia and Indonesia, Saudi Arabia offers an excellent infrastructure for Muslim travelers, bolstered by its significant religious and cultural heritage.

Saudi Arabia's strategic enhancements in tourism infrastructure and services, combined with its intrinsic religious significance, solidify its standing in the GMTI as a top destination for Muslim travelers. The kingdom's focus on enriching the pilgrimage experience and expanding access to its heritage sites demonstrates a vision to harnessing its unique cultural assets in the evolving global travel landscape.



Turkiye

Turkiye's appeal is deeply rooted in its immense Islamic heritage. The destination is home to thousands of historical mosques and significant sites that date back to various Islamic caliphates, offering a profound cultural journey to its visitors. The integration of these heritage sites with tourism initiatives allows visitors to immerse themselves in Turkiye's historical narrative while enjoying contemporary comforts.

Turkiye's strength also lies in its air connectivity. With Istanbul's position as a global hub, it offers extensive flight options connecting multiple continents.

From fine dining in cosmopolitan cities like Istanbul and Ankara to local eateries in smaller towns, Halal options are abundant and varied, reflecting the rich culinary traditions of the region.



United Arab Emirates

The UAE is renowned for its ultramodern infrastructure, which includes towering skyscrapers, expansive shopping malls, and world-class attractions. These facilities are not only impressive but are also equipped to cater to the needs of Muslim travelers. Prayer areas are integrated into public spaces, including malls, parks, and even beaches, ensuring accessibility and convenience for prayer obligations.

It distinguishes itself as a modern destination that blends contemporary luxuries with traditional Islamic culture.

The UAE's air connectivity is among the best in the world, with major airports in Dubai and Abu Dhabi serving as international hubs.

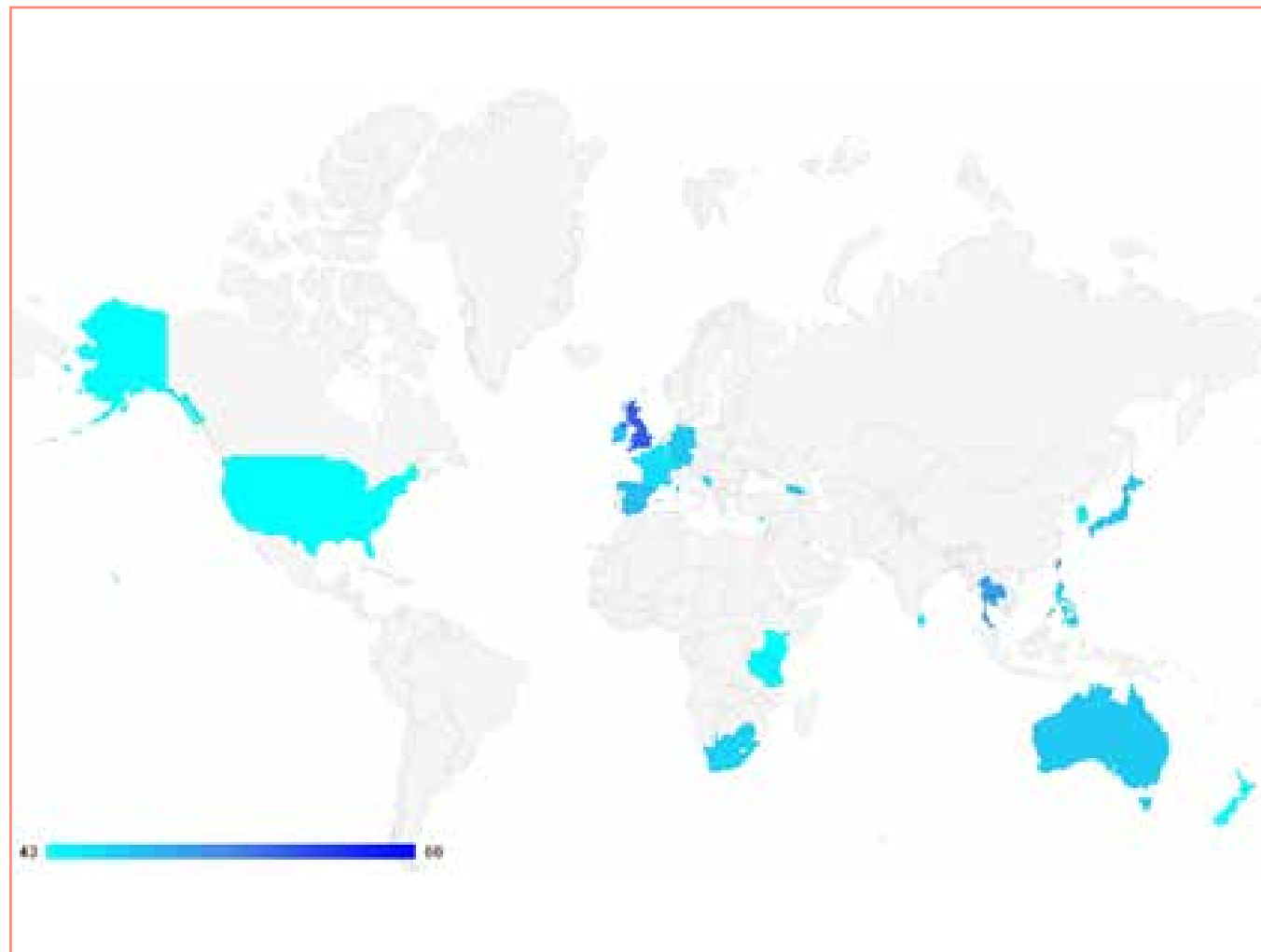
Halal food is readily available across the UAE, from luxury hotels and high-end restaurants to local dining spots.

GMTI 2024 Rankings - Top 20 non-OIC destinations

This year's ranking shows a positive trend in the performance of non-OIC destinations, with the average score of the top 20 increasing by more than 6%. This improvement underscores the ongoing efforts of these destinations to enhance their appeal and services to meet the needs of Muslim travelers. While some non-OIC destinations have experienced slight drops in their rankings, the majority have seen an increase in their GMTI scores, similar to the overall trend observed in the top 20 rankings discussed earlier.

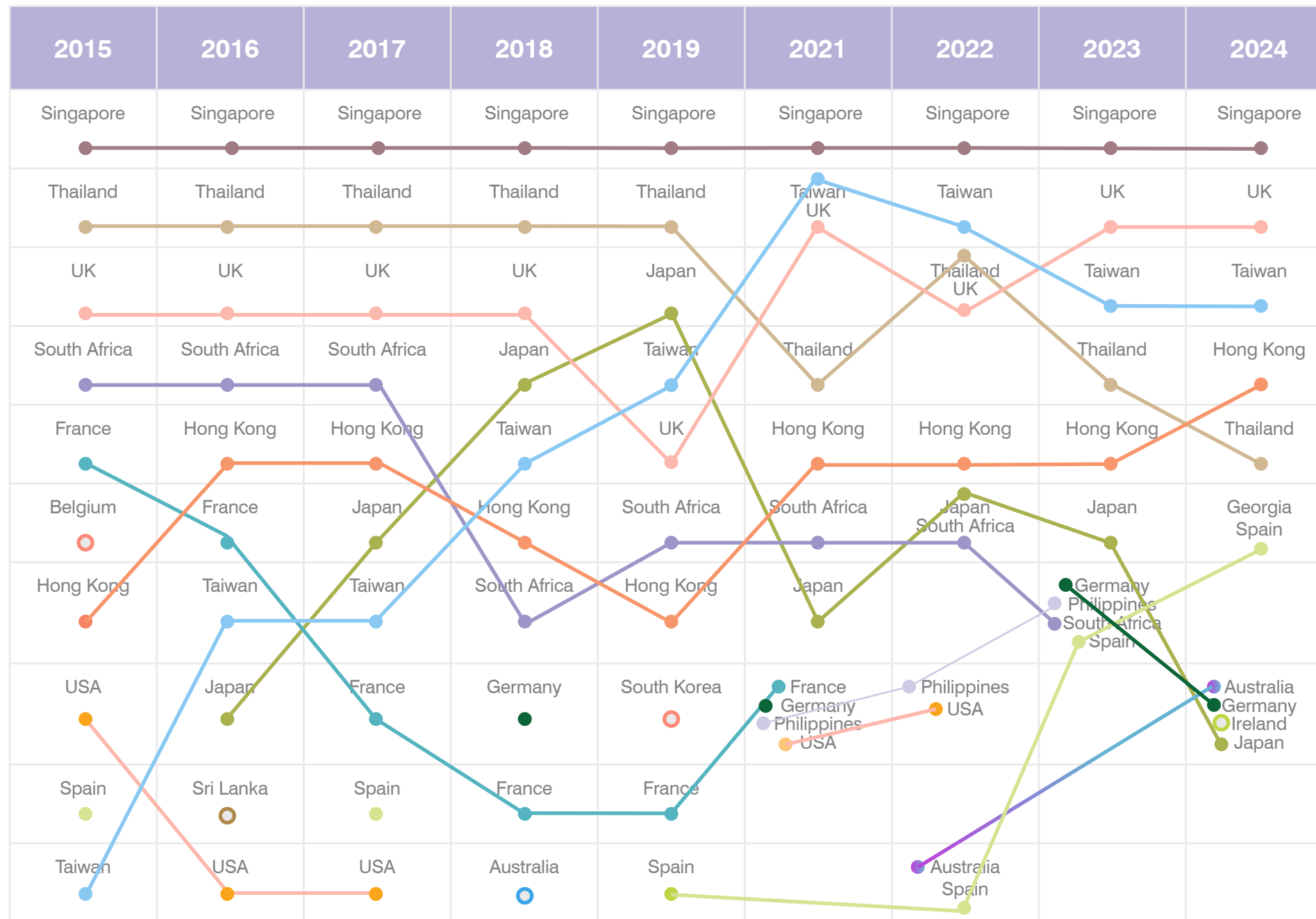
Singapore is still the leader and also improving its score from 62 to 66. The United Kingdom has maintained its stable score of 58, reflecting its robust amenities and services for Muslim travelers. Taiwan and Hong Kong have also shown notable improvements, with scores rising to 55 and 54 respectively, driven by enhanced Halal-friendly offerings.

Other notable improvements were seen in Spain and Georgia, both achieving significant score increases, highlighting their growing appeal as Muslim-friendly destinations. Emerging destinations like Belgium, Tanzania, the Philippines, South Africa, and Bosnia and Herzegovina also showed improvements in their scores, indicating a broader trend of non-OIC destinations enhancing their competitiveness in the Muslim travel market.



Non-OIC Rank	Change VS 2023	GMTI 2024 Rank	Destination	GMTI 2024 Scores	Change Vs 2023
1	0	9	Singapore	66	+4
2	0	24	United Kingdom (UK)	58	0
3	0	28	Taiwan	55	+2
4	+1	30	Hong Kong	54	+4
5	-1	32	Thailand	52	0
6	+1	35	Spain	49	+3
7	+6	35	Georgia	49	+5
8	+3	39	Australia	48	+3
8	-2	39	Germany	48	+2
8	+7	39	Ireland	48	+6
8	0	39	Japan	48	0
12	-4	43	South Africa	47	+1
12	0	43	Bosnia and Herzegovina	47	+3
12	-5	43	Philippines	47	+1
15	-2	45	France	46	+2
16	0	48	South Korea	45	0
16	+4	48	Sri Lanka	45	+6
16	+4	48	Switzerland	45	+6
17	+10	51	Belgium	44	+6
17	+2	51	Tanzania	44	+3
19	-7	53	USA	43	-2
19	+8	53	New Zealand	43	+5
19	+14	53	Cyprus	43	+6
19	-2	53	Kenya	43	+2

GMTI ranking trends (2015-2024): Stability and Shifts Among Top 10 Non-OIC Destinations



The analysis of the GMTI rankings for non-OIC destinations from 2015 to 2024 highlights the progressive efforts and strategic advancements these destinations have made to attract Muslim travelers. Singapore consistently leads the rankings throughout these years, underscoring its robust commitment to catering to Muslim travelers through excellent airport facilities, widespread availability of Halal food, and inclusive tourism services. Similarly, the United Kingdom has remained a top choice, thanks to its vibrant Muslim community, extensive Halal services, and culturally rich attractions that appeal to Muslim visitors.

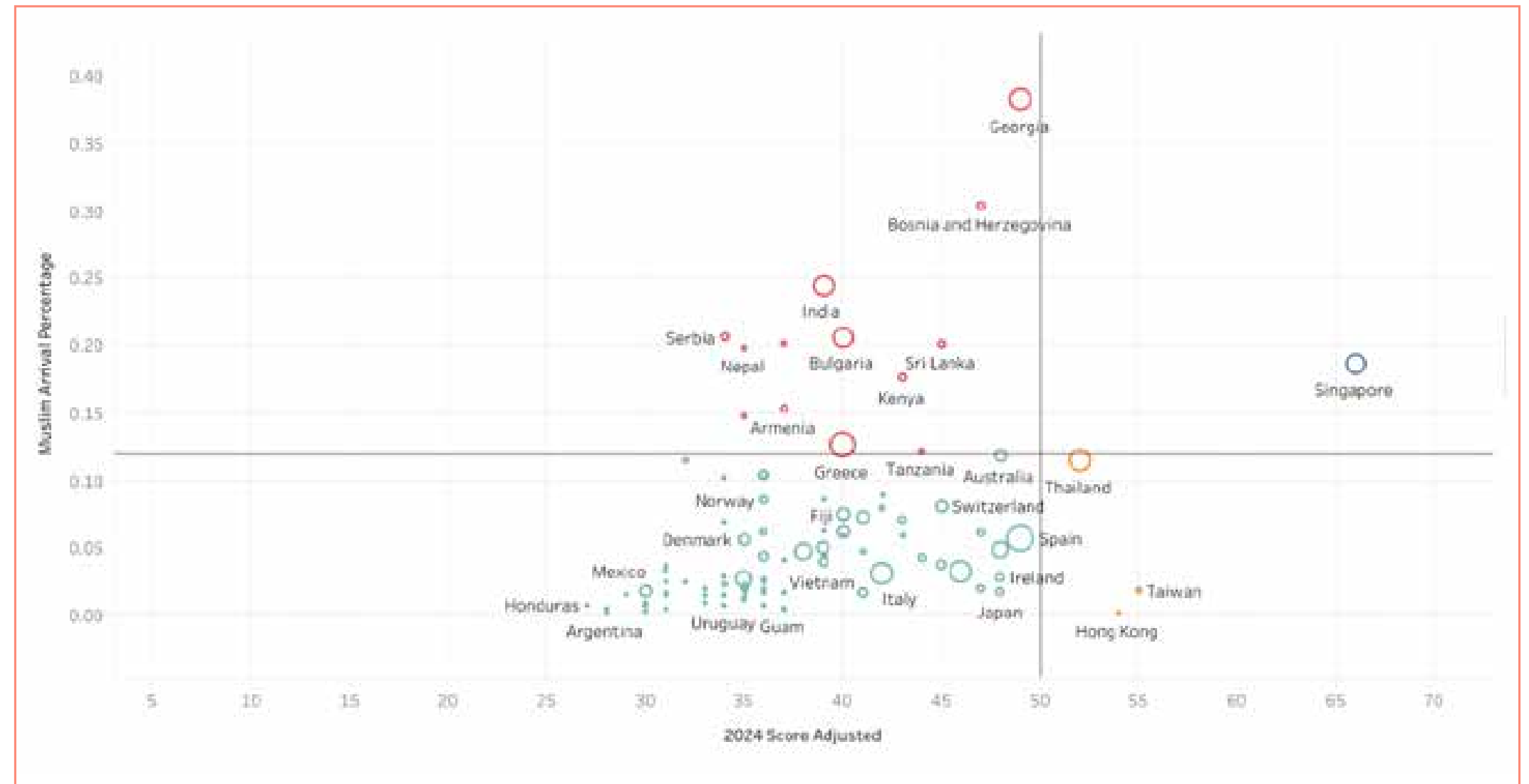
Taiwan and Thailand have shown remarkable improvement in their rankings over the years. Taiwan's significant rise can be attributed to its targeted promotional efforts, enhanced Halal certification processes, and the development of Muslim-friendly infrastructure.

Destinations like Hong Kong, and South Africa have fluctuated in their rankings but remain strong contenders by continually improving their Muslim-friendly amenities. Destinations like the Philippines and Spain have entered the rankings more recently, indicating their growing recognition of the value of Halal tourism.

GMTI Performance Matrix (GPM) - non-OIC destinations

For the Non-OIC destinations, there is one standout destination in the Trailblazers quadrant, excelling in accommodating Muslim travelers. This destination welcomed 2.3 million Muslim visitors in 2023, accounting for about 1.5% of the total global Muslim arrivals. The Potential Leaders quadrant for Non-OIC destinations includes four promising destinations with progressive offerings and services. These destinations attracted approximately 7.3 million Muslim travelers, representing 4.7% of the global Muslim arrivals.

The Emerging Destination quadrant for Non-OIC destinations includes 15 destinations that are in the early stages of recognizing and addressing the needs of the Muslim traveler market. Despite being at the beginning of their journey, these destinations attracted around 14 million Muslim visitors, accounting for 9.4% of total global Muslim arrivals. Lastly, the Untapped Opportunities quadrant for Non-OIC destinations comprises 85 destinations. Although these destinations are under-utilized in terms of their potential to attract Muslim travelers, they still drew around 32 million Muslim visitors, representing approximately 21% of global Muslim arrivals.



Leading Muslim-friendly Destinations - non-OIC



Singapore

Singapore's combination of advanced technology, strong, sustainable tourism initiatives, diverse Halal dining options, and unparalleled safety makes it a top destination in the GMTI. Its forward-thinking approach to embracing technology and sustainability, along with its commitment to catering to the needs of Muslim travelers, ensures that Singapore continues to be a preferred choice for those seeking a modern, secure, and environmentally responsible travel experience.

From automated services at Changi Airport to smart technologies enhancing visitor experiences across the city, the destination's focus on innovation makes travel seamless and efficient.

Committed to sustainability, Singapore has implemented numerous initiatives that make it a leader in eco-friendly travel. These include extensive green spaces, eco-friendly public transport options, and sustainable practices in hotels and attractions.

Singapore is celebrated for its diverse culinary scene, offering an extensive range of Halal-certified cuisines that cater to its multicultural population and international visitors.

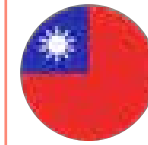


Thailand

Thailand has made concerted efforts to attract Muslim travelers over the years. By providing Halal food options, pioneering in Halal consumer products, and leveraging its substantial Muslim communities, Thailand offers a welcoming and culturally rich environment for Muslim visitors. These factors, combined with the destination's natural beauty and renowned hospitality, ensure that Thailand remains a top choice for Muslim travelers..

Recognizing the importance of Halal cuisine for Muslim travelers, Thailand has ensured that Halal food is generally available, particularly in significant tourism hotspots. Destinations like Bangkok, Phuket, and Krabi offer many Halal restaurants and street food options.

Significant Muslim communities in regions like Krabi and Phuket play a crucial role in the local tourism sector. These communities not only contribute to the Halal services available but also enrich the cultural exchange between visitors and locals.



Taiwan

Taiwan is making significant strides in the GMTI by strongly positioning itself as a Muslim-friendly destination. With concerted efforts to enhance its appeal to Muslim travelers, Taiwan is rapidly transforming its tourism landscape to accommodate the specific needs of this growing demographic.

One of Taiwan's key initiatives has been the substantial increase in Halal-certified restaurants across the island. Each year, more dining establishments are embracing Halal certification, ensuring that Muslim visitors have a wide range of culinary options. Acknowledging the importance of prayers for Muslim visitors, Taiwan has established prayer rooms in strategic locations such as airports, train stations, and major tourist attractions.

Taiwan has also launched targeted promotional campaigns under the slogan "Salam Taiwan." These campaigns are specifically designed to highlight Taiwan's readiness and enthusiasm for welcoming Muslim travelers. By showcasing Taiwan's Muslim-friendly amenities and cultural respect, these promotions play a crucial role in raising awareness and attracting Muslim visitors.



United Kingdom

The United Kingdom has increasingly become a prominent destination for Muslim travelers. With significant Muslim populations in major cities such as London, Birmingham, and Manchester, the UK offers increasing number of Muslim-friendly services.

In the UK, especially in urban centers, Halal food is readily accessible, reflecting the diverse culinary landscape. Cities like London are renowned for their rich and varied Halal food scene, offering everything from street food to high-end Halal dining experiences. Prayer facilities are widely available across the destination.

The UK's strength as a travel destination lies in its rich historical and cultural heritage. Iconic landmarks, museums, castles, and the scenic countryside offer a compelling mix of adventure and exploration for travelers.

In major cities like London, the integration of Muslim-friendly services within the broader tourism framework showcases the UK's diversity and inclusivity.

Emerging Muslim-friendly non-OIC Destinations



Philippines

The Philippines has focused on building capacity to welcome Muslim tourists through various initiatives. These include increasing the availability of Halal food across the destination and integrating Muslim-friendly amenities at major tourist spots. Tourism Authorities have placed Halal tourism high on their agenda, evidenced by their actions to enhance the Halal tourism portfolio and raise awareness among tourism stakeholders about the values and practices important to Muslim travelers. This includes significant efforts to boost the number of Muslim-friendly accommodations and dining establishments.

Through these dedicated initiatives and the strategic promotion of its rich cultural heritage and beautiful landscapes, the Philippines is steadily becoming a favored destination for Muslim travelers.



Hong Kong

Hong Kong's unique tourism offerings make it an especially attractive destination. The blend of modern cityscape with traditional markets and lush landscapes, offers a comprehensive travel experience. The city's efforts to integrate Muslim-friendly services within its vibrant tourism sector help in making it an emerging destination for travelers choosing a Muslim Friendly destination, particularly from Southeast Asia and the GCC.

The availability of Halal food in Hong Kong has increased, including major international fast food chains receiving Halal certification. This expansion into mainstream dining options demonstrates Hong Kong's travel industry's commitment to accommodating the dietary needs of Muslim visitors.

Hong Kong has also been rolling out initiatives to attract Muslim tourists through promotional campaigns and media tours.



South Africa

Through targeted training, an expanding array of Halal services, and community-backed initiatives, South Africa is rapidly becoming a key player in the Muslim travel market.

It is enhancing its status as a Muslim-friendly destination, particularly through robust initiatives in cities like Cape Town. Major cities and tourist hotspots are now equipped with a variety of Halal dining options.

South Africa's strong local Muslim community plays a crucial role in the tourism sector, providing a welcoming atmosphere and ensuring that cultural and faith traditions are respected and accommodated. More hotels are positioning themselves as Muslim-friendly, offering services such as Halal food and prayer facilities.

Cities like Cape Town are at the forefront of educating the tourism industry on how to cater to Muslim visitors effectively. Initiatives include training programs for hotel staff and restaurant owners.



Spain

Spain is actively enhancing its appeal as a Muslim-friendly destination, particularly through its rich Islamic heritage in regions like Andalusia, which includes cities like Malaga and Cordoba. The destination's efforts are supported by a series of initiatives aimed at making Spain a top choice for Muslim travelers.

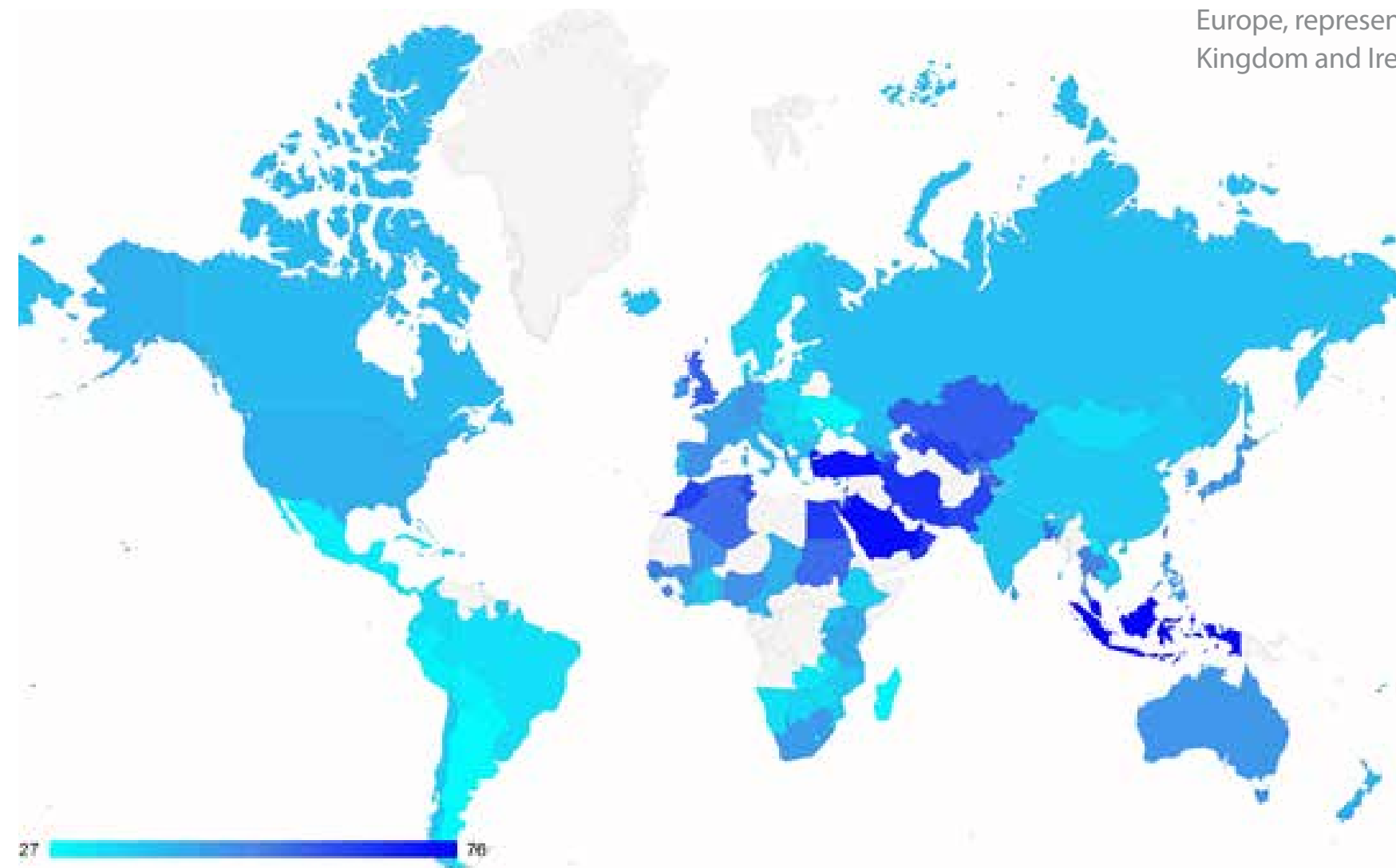
In recent years, Spain has focused on developing Muslim visitor guides for key regions such as Malaga, Andalusia, and Cordoba. The guides are part of a broader promotional strategy, including roadshows aimed at Muslim-majority markets, to highlight Spain's readiness to welcome Muslim visitors.

These campaigns are complemented by educational initiatives aimed at local businesses, encouraging them to adopt practices that cater to the needs of Muslim travelers, such as offering Halal food and establishing prayer spaces.

The historical backdrop of cities like Cordoba and Granada, are a cornerstone of Spain's tourism appeal, allowing visitors to explore the profound historical ties between Islamic civilization and Spanish culture.

GMTI 2024 Rankings - Regional Analysis

The GMTI 2024 highlights significant regional performances and the top destinations catering to Muslim travelers. Western Asia has the highest average score, featuring Saudi Arabia and Türkiye, reflecting their widespread availability of Muslim-friendly travel services. Northern Africa follows closely, with Egypt and Morocco excelling due to their rich Islamic heritage and enhanced infrastructure.



Central Asia, with Uzbekistan and Kazakhstan/Kyrgyzstan, and South-Eastern Asia, led by Malaysia, Indonesia, Singapore, and the Philippines, show robust performance by offering a blend of historical Islamic architecture and comprehensive Muslim-friendly services.

In the non-OIC category, Eastern Asia's notable destinations, Taiwan and Hong Kong, demonstrate significant efforts in providing halal food options and prayer facilities. Western Europe, represented by Germany and France, and Northern Europe, with the United Kingdom and Ireland, highlight their increasing availability of Muslim-friendly services.

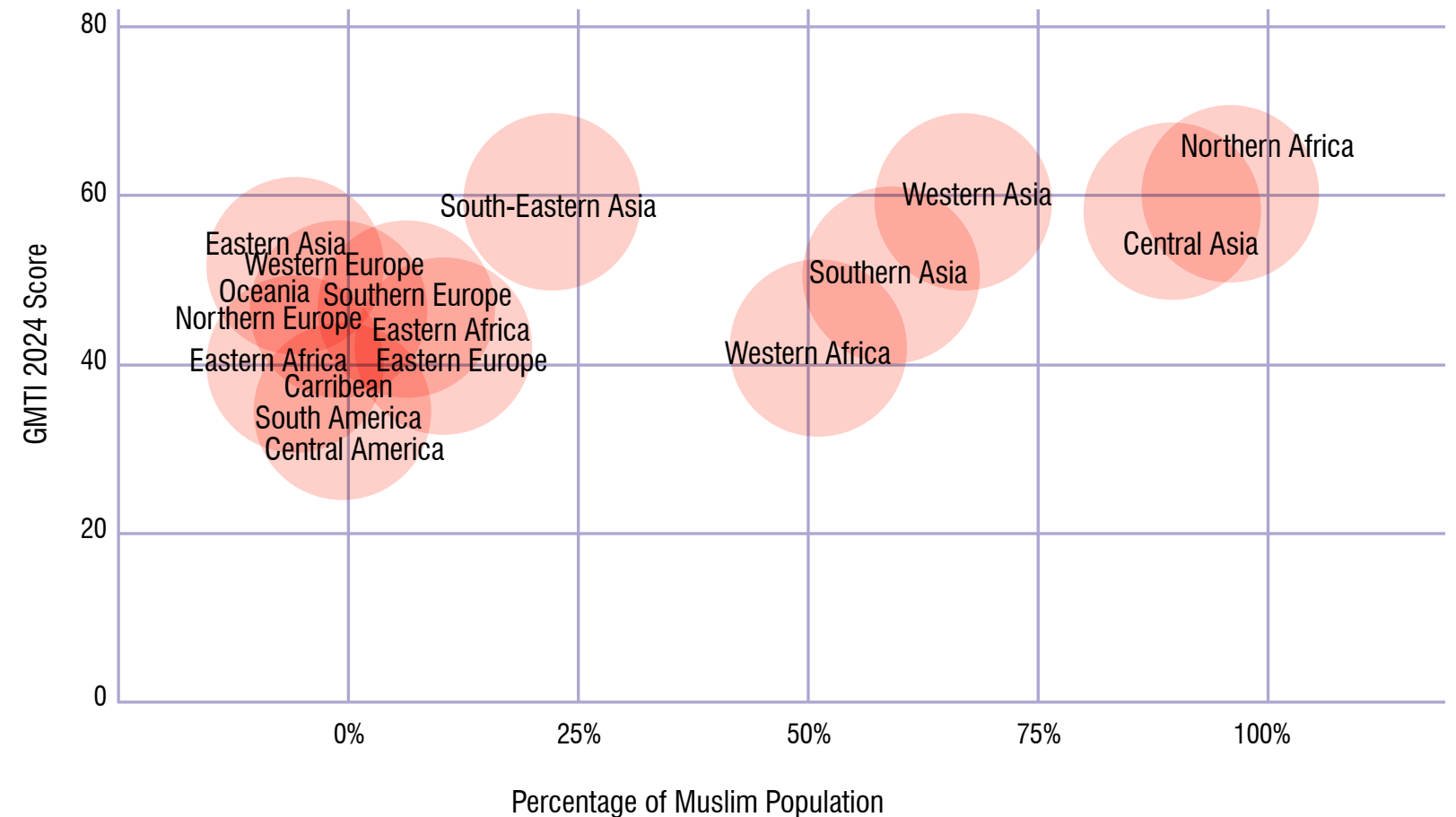
Region	Average GMTI 2024 Score	Top 2 Destinations
Western Asia	62	Saudi Arabia, Türkiye
Northern Africa	61	Egypt, Morocco
Central Asia	59	Uzbekistan, Kazakhstan/Kyrgyzstan
South-Eastern Asia	54	Malaysia/Indonesia
Southern Asia	53	Iran, Maldives
Eastern Asia	46	Taiwan, Hongkong
Western Europe	44	Germany, France
Western Africa	43	Senegal, Sierra Leone
Oceania	42	Australia, New Zealand
Southern Europe	41	Albania, Spain
Northern Europe	40	United Kingdom, Ireland
Eastern Africa	38	Tanzania, Kenya
Northern America	38	USA, Canada
Southern Africa	37	South Africa, Chad
Eastern Europe	35	Bulgaria/Russia
Caribbean	35	Trinidad and Tobago, Puerto Rico
South America	32	Suriname/Chile
Central America	30	Costa Rica/Panama/Nicaragua

How Muslim Population Percentage Influences Scores Across Regions

The data reveals a positive correlation between Muslim population percentage and the Global Muslim Travel Index 2024 score. Regions with higher Muslim populations, such as Western Asia (65.8%, GMTI score of 62), Northern Africa (96.7%, GMTI score of 61), and Central Asia (89.0%, GMTI score of 59), tend to have better GMTI scores. These regions have a significant advantage in understanding the needs of Muslim travelers, which helps them provide amenities such as halal food options, prayer facilities, and culturally sensitive services, resulting in high GMTI scores.

Interestingly, regions with moderate Muslim populations also achieve relatively high GMTI scores. South-Eastern Asia, with a Muslim population percentage of 28.9%, has a GMTI score of 54. This can be attributed to strategic efforts by these regions to develop and promote Muslim-friendly tourism. Countries like Malaysia and Indonesia have invested heavily in providing extensive halal options, prayer facilities, and marketing targeted at Muslim tourists. Their commitment to accommodating Muslim travelers has significantly enhanced their GMTI scores, despite having a moderate Muslim population percentage.

Notably, Western Europe stands out as a region with a low Muslim population percentage (6.6%) but a relatively high GMTI score of 44. This indicates that a high GMTI score is not exclusively linked to a high Muslim population percentage. Western Europe's ability to achieve a reasonable GMTI score despite its low Muslim population showcases that all regions have the opportunity to provide good amenities for Muslim-friendly travel. By implementing Muslim-friendly practices and facilities, regions can attract Muslim tourists and improve their GMTI scores, demonstrating that any region can become a preferred destination for Muslim travelers regardless of their Muslim population.



GMTI 2024 ACES Rankings - Access

The Access criteria of the ACES framework evaluate the accessibility of a destination from the top 30 Muslim travel outbound markets.

Qatar: Qatar has shown significant improvement in its accessibility ranking over the years, from 10th in 2021 to the top position in 2024. This rise can be attributed to enhanced air connectivity, improved transport infrastructure, and favorable visa requirements. The destination's strategic investments in transport infrastructure and hosting major international events likely contributed to its top ranking.

United Arab Emirates (UAE): The UAE has consistently been one of the top destinations, although Qatar has overtaken it for the 1st position. The UAE's well-developed air connectivity and transport infrastructure, combined with progressive visa policies, make it a prime destination for travelers.

Saudi Arabia: Saudi Arabia has maintained a strong position, ranked 3rd in 2024. The Kingdom's position reflects substantial improvements in air connectivity and visa facilitation, especially with the introduction of tourist visas and the destination's vision to boost tourism as part of its economic diversification efforts.

Oman: Oman has maintained a steady position of fourth over the years. Its focus on developing its tourism infrastructure and easing visa requirements has made it more accessible to travelers.

Turkiye: Turkiye remains a popular destination, and have occupied the 5th position during the last few years. Its rank reflects its strong air connectivity, strategic location, and efficient transport infrastructure.

Top 10 in ACCESS

QATAR
UAE
SAUDI ARABIA
OMAN
TÜRKIYE
JORDAN
GEORGIA
MALAYSIA
AZERBAIJAN
IRAN

The consistent rise in Access pillar's average score over the last four years signifies a positive trend in the accessibility of destinations for Muslim travelers. As destinations continue to focus on these areas, the overall accessibility for Muslim travelers is expected to improve further, fostering growth in the global Muslim travel market.

Air Connectivity (2021-2024)

The average air connectivity scores have shown a progressive improvement from 2021 to 2024, reflecting enhanced efforts by destinations to improve their direct flight connections to major Muslim outbound markets. The average score in 2024 has increased by around 35% compared to the 2021 score.

Top Performers: Qatar, Turkiye, Saudi Arabia and UAE

Visa Requirements (2021-2024)

Many destinations have shown consistent improvement in their visa requirements scores over the years, indicating efforts to simplify and streamline visa processes.

Top Performers: Malaysia, Ecuador, Georgia and Qatar rank at the top, showcasing their effective visa policies.

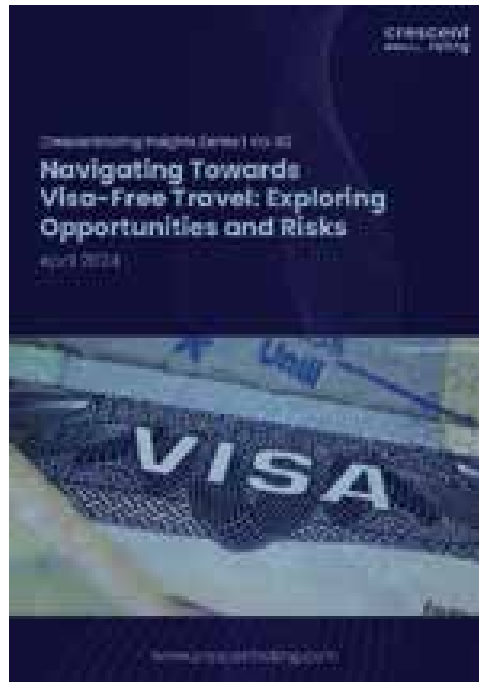
Transport Infrastructure (2021-2024)

The scores for transport infrastructure have remained high across the top destinations, indicating a consistent focus on providing excellent transport services and infrastructure.

Top Performers: Destinations like Singapore, Hong Kong, and Japan have consistently ranked at the top, showcasing their world-class transport infrastructure.

Visa-Free Travel Trend and Its Impact

In the last two years, there has been an increasing trend towards visa-free travel. This trend has been driven by a desire to accelerate recovery after the pandemic, as well as globalization, economic growth, cultural exchange, and diplomatic relations. Many countries have recognized the potential benefits of easing travel restrictions, which has led to increased international mobility.



For more data and analysis on Visa-free travel, refer to the CrescentRating Insights Vol 2 publication released in April 2024.

Benefits

Boost to Tourism: Visa-free travel encourages tourists to visit destinations by reducing the administrative burden and costs associated with visa applications. As a result, destinations experience an influx of international travelers, benefiting local economies. The UN World Tourism Organization reported an estimated 1.3 billion international tourists in 2023, illustrating the scale of the impact on global tourism.

Economic Growth: Increased tourism and business travel stimulate economic growth. The World Travel & Tourism Council noted Indonesia's 30-day visa waiver policy led to a 24% increase in inbound tourism from 2015 to 2018, creating 190,000 jobs. Additionally, relaxed visa policies improve cross-border trade. A study by Nitsch (2018) revealed a 32% increase in exports between countries with visa-free agreements.

Diplomatic Relations: Visa-free policies can strengthen diplomatic ties between nations. Destinations often use visa exemptions as negotiation tools or to reflect geopolitical relations, as seen in Turkey's 2016 agreement with the EU to allow Turkish citizens visa-free entry to EU member states.

Drawbacks

Security Risks: Visa-free travel poses potential security concerns. Destinations worry about illegal immigration, and other criminal activities.

As such, destinations need effective mechanisms to monitor and regulate the length of stay and activities of visa-free visitors to prevent issues such as illegal immigration and overstays.

Economic Challenges: The influx of travelers can lead to economic challenges, such as over-tourism, which strains local infrastructure and resources. The sheer volume of visitors may lead to cultural dilution, where local traditions and lifestyles are overshadowed by tourist-oriented commercialization.

Visa-free travel policies thus offer significant benefits while posing notable risks, necessitating careful consideration by destinations aiming to balance openness and security.





Intra-OIC Visa-Free Analysis

The Organization of Islamic Cooperation (OIC) includes 57 member states with diverse geopolitical, economic, and cultural backgrounds. This diversity influences the visa policies among OIC countries, affecting intra-OIC travel.

Diversity in Visa Policies: Most OIC destinations have fewer than 90 countries with visa-free access (according to the Passport Index). When the members allow visa-free policies, they are selective not to include all member states. As major tourism countries, the Maldives and Malaysia allow for visa-free entry to most OIC destinations and are reciprocated by more than half of the OIC. On the other hand, the UAE has the most access but doesn't extend the bilateral visa-free policies to others. Indonesia offers visa-free entry to only 15 OIC states. The variations in visa policies reflect diverse national priorities, such as security, economic growth, and cultural integration.

Gulf Cooperation Council (GCC) Free Movement: The GCC has established free movement between its member states, enabling seamless travel using national IDs. This agreement has fostered increased economic productivity and collaboration among GCC members, serving as a model for other OIC regions.

Economic Impact: Visa-free access affects tourism and economic growth among OIC members. Countries like Malaysia and Indonesia see around 20% of their tourists originating from OIC states. In contrast, despite limited visa-free access, Egypt's inbound tourism consists of 30% OIC visitors.

 Passport Index Ranking	 OIC Outbound visa-free access	 Destination	 OIC Inbound visa-free access
1	48	UAE	12
2	43	Malaysia	56
3	35	Brunei	10
4	42	Türkiye	22
5	29	Albania	11
6	40	Qatar	17
7	42	Kuwait	8
8	31	Maldives	56
	40	Bahrain	10
	40	Saudi Arabia	15
9	40	Oman	13
10	23	Guyana	6

Intra-OIC Visa-Free Index

CrescentRating's Intra-OIC Visa-Free Index measures the overall openness of OIC destinations inbound and outbound visa-free access. The index provides a score out of 100, indicating the degree of travel freedom within the OIC.

Few Visa-free Access: Most countries in the OIC have fewer than 90 countries with visa-free access, and when the members allow visa-free policies, they are selective not to include all member states.

Top Ranking Destinations: Malaysia leads the index with a score of 95, offering visa-free access to almost all OIC destinations and reciprocating with inbound visa-free access. The Maldives and Suriname also score high, showcasing the balance between openness and international travel.

Disparities in the OIC: Although countries ranked high within the global Passport Index (such as the UAE, Qatar, and Albania), their lack of openness between OIC members significantly lowers their ranking for this index, showing that cooperation in terms of mobility in the OIC is yet to be developed.

Policy Implications: The index demonstrates that visa-free policies are not uniform across the OIC. Destinations need to consider economic, political, and cultural factors in implementing visa-free arrangements to achieve a balanced approach.

For further insights and detailed analysis, refer to CrescentRating Insights Vol 2 publication released in April 2024.

Rank	Destination	Index Score
1	Malaysia	95
2	Maldives	82
3	Suriname	77
4	Mauritania	76
5	Guinea	75
5	Nigeria	85
7	Togo	74
7	Gabon	74
7	Guinea-Bissau	74
10	Djibouti	72

Rank	Destination	Index Score
11	Comoros	71
12	Uganda	70
13	Iran	68
14	Mozambique	66
15	Türkiye	63
16	Gambia	61
16	United Arab Emirates	61
18	Tunisia	60
19	Senegal	58
20	Qatar	57

Analyzing visitor flows between OIC and non-OIC destinations

The analysis examines the visitor flows from OIC and non-OIC source markets to OIC and non-OIC destinations.

The composition of arrivals to OIC and non-OIC destinations highlights several critical aspects of global tourism dynamics. Firstly, non-OIC destinations' tourism sectors rely significantly more on non-OIC tourists, with a much larger volume of visitors before and during the pandemic. In contrast, OIC destinations had a more balanced composition of non-OIC and OIC tourists before the pandemic, which shifted slightly towards a higher proportion of OIC tourists during the pandemic. This shift could be due to the relative ease of regional travel within OIC destinations and stricter international travel restrictions affecting non-OIC tourists. The data reveals that OIC economies are more vulnerable to fluctuations in global tourism trends, as evidenced by the sharper declines and slower recovery in arrivals compared to non-OIC economies.

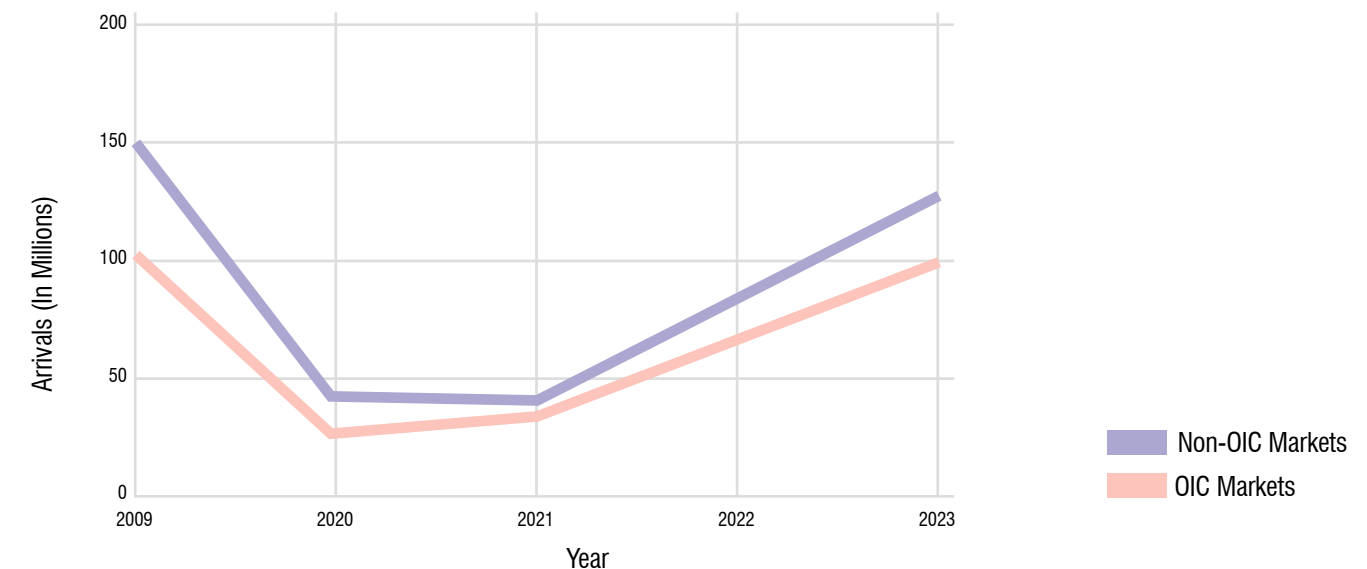
Diversification of Source Markets:

OIC Destinations: To mitigate future risks, OIC destinations have a unique opportunity to enhance their tourism sectors by further diversifying their source markets. Promoting intra-OIC travel and attracting more visitors from emerging markets could achieve this, potentially leading to a more resilient and stable tourism sector.

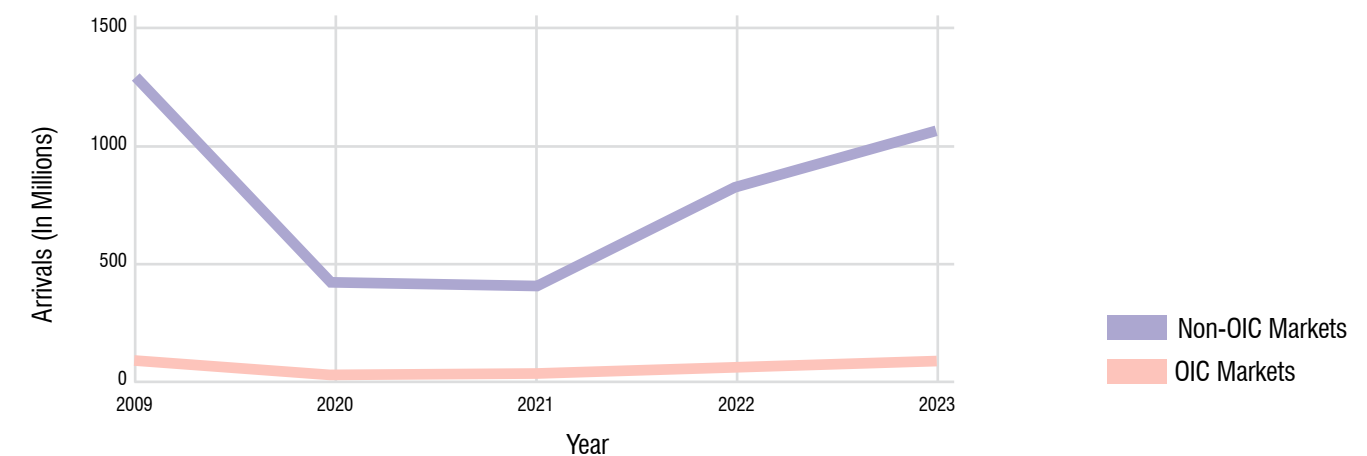
Non-OIC Destinations: Non-OIC destinations could focus on increasing their appeal to OIC travelers by improving Muslim-friendly services and marketing, thus diversifying their visitor base and enhancing resilience.

Strategic Focus: OIC and non-OIC destinations should consider balanced strategies targeting a mix of OIC and non-OIC markets to build a robust and sustainable tourism sector that can withstand global disruptions.

Arrivals to OIC Destinations



Arrivals to Non-OIC Destinations



GMTI 2024 ACES Rankings - Communications

The Communication category evaluates how effectively destinations communicate with Muslim travelers as well as educate stakeholders within the destinations.

Communications Proficiency

Communications Proficiency measures the proficiency of destinations in the top 10 languages spoken by Muslim travelers. These languages are English, Arabic, Bahasa Melayu, Russian, Urdu, Bahasa Indonesia, Turkish, French, Persian, and German. While the importance of this criterion will gradually reduce with the advancement of AI tools capable of live translation for travelers, it remains crucial for the time being. Proficiency in Arabic and English is particularly significant, as these are the top two languages spoken by the majority of Muslim travelers. Destinations that are proficient in these languages are better positioned to cater to the needs and preferences of Muslim tourists.

The top destinations in this category are Jordan, Tunisia, Lebanon, Egypt, United Arab Emirates (UAE). These destinations have demonstrated a high level of proficiency in both Arabic and English.

To enhance their communication proficiency, destinations should develop language assistance in the top 10 languages spoken by Muslim travelers. This includes both human language assistance services and AI-driven live translation tools.

Destination Marketing

The Destination Marketing criterion in the Communications pillar of the ACES framework evaluates how well destinations promote their Muslim-friendly services and information. This includes the use of websites, apps, downloadable Halal/Muslim travel guides, FAM trips, and other digital platforms, as well as the frequency and quality of media mentions highlighting the destination as Muslim-friendly.

During the data collection period for this report (April 2023 to March 2024), it was observed that many destinations did not place significant emphasis on marketing specifically towards Muslim travelers. This general trend suggests a missed opportunity for destinations to target and welcome Muslim travelers.

The top destinations in this category are Taiwan, Indonesia, Malaysia, Spain, and Hong Kong. They are notable exceptions where destinations have actively promoted their Muslim-friendly services.

It is imperative for destinations to roll out campaigns that specifically welcome and resonate with Muslim travelers. Understanding the nuances of the Muslim travel market and addressing their needs through tailored marketing efforts can significantly enhance a destination's appeal.

Stakeholder Awareness

The Stakeholder Awareness criterion assesses the level of understanding and awareness of Muslim travel and lifestyle needs at a destination. This evaluation considers several factors, including the presence of a Muslim community at the destination.

Additionally, it examines efforts to educate the travel trade through conferences, fairs, workshops, and other initiatives aimed at enhancing knowledge about Muslim travelers' needs. These initiatives help raise awareness and understanding among local businesses and hospitality providers.

During the last year (April 2023 to March 2024), not much work has been made by destinations in terms of enhancing stakeholder awareness. Investing in educating travel stakeholders is crucial, even in destinations with a majority Muslim population. The hospitality industry may have been previously trained to cater to different target markets, and a renewed focus on Muslim travel needs is essential.

By prioritizing stakeholder awareness and education, destinations can ensure that their travel industry is well-equipped to cater to Muslim travelers, enhancing their overall experience and satisfaction.

The Role of Muslim Visitor Guides

Muslim visitor guides, known as Halal Travel Guides, have become increasingly crucial for destinations worldwide. These guides serve multiple purposes, enhancing Muslim travelers' experience while benefiting the destinations themselves.

Welcoming Muslim Travelers: One of the key functions of Muslim visitor guides is signaling to Muslim travelers that the destination is welcoming and inclusive. By creating these guides, destinations send a clear message that they value and accommodate Muslim tourists, fostering positive relationships and encouraging further travel.

Highlighting Muslim-Friendly Services: Muslim visitor guides offer an opportunity to showcase the various Muslim-friendly services available at the destination

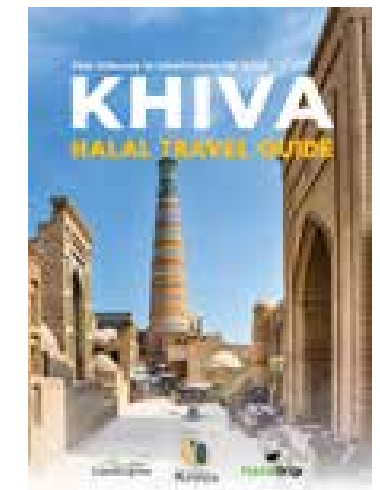
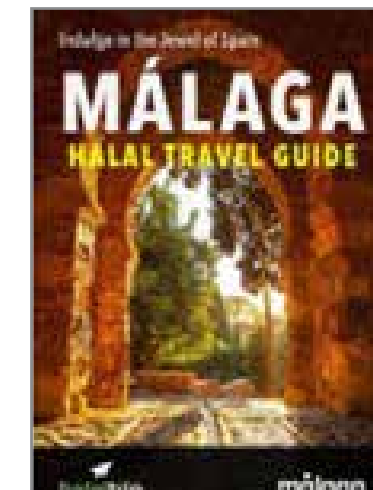
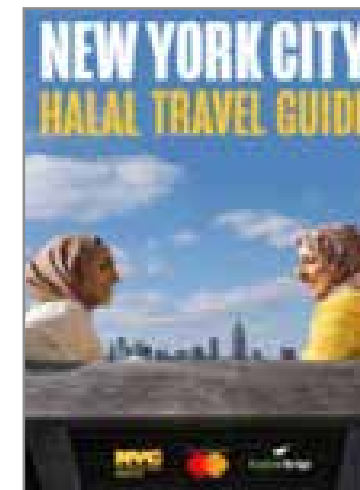
Recent Guides: Post-pandemic, HalalTrip has partnered with several destinations to develop Muslim visitor guides for various cities:

- **Singapore:** The guide emphasizes the city's halal culinary scene, prayer facilities, and family-friendly attractions, showcasing Singapore's multicultural and inclusive environment.
- **New York City:** The guide highlights NYC's diverse halal dining options, mosques, and cultural experiences, presenting the city's vibrant halal travel scene.
- **Malaga:** This guide focuses on the Andalusian city's halal-friendly services, including halal restaurants and prayer facilities, while also highlighting Malaga's rich Islamic heritage.
- **Khiva:** The guide showcases Khiva's rich Islamic heritage, delving into its historical and cultural significance to the Muslim world. It offers insights into the city's longstanding Islamic traditions, including its architectural highlights, and cultural sites.

Additional Benefits:

- **Tourism Growth:** Muslim visitor guides can lead to increased tourism by simplifying travel planning and enhancing the visitor experience. This, in turn, boosts the local economy and fosters cultural exchange.
- **Brand Image:** Developing these guides can strengthen a destination's brand image, positioning it as Muslim-friendly and inclusive, which can attract further travelers from the Muslim world.

Recognizing the importance of these guides, the Communication pillar in the ACES framework includes metrics evaluating destinations that have published such guides. This highlights the significance of transparent, accessible information in attracting Muslim travelers.



GMTI 2024 ACES Rankings - Environment

The Environment category evaluates multiple facets of a destination's environment to determine its overall suitability and attractiveness for Muslim travelers.

Faith Restrictions

The Faith Restrictions evaluation focuses on identifying and assessing any limitations or bans that might affect Muslim travelers' ability to practice their faith freely during the journey. This includes examining three key areas; Hijab, Niqab and Ritual Slaughter restrictions.

The majority of destinations evaluated do not impose restrictions. However, there are a few destinations that have implemented specific bans or restrictions in one or more of these areas:

Hijab Restrictions: Some destinations have restrictions on wearing the hijab, which can influence the overall perception of religious acceptance and freedom in these places.

Niqab restrictions: Similarly a few destinations have enacted bans on the niqab, impacting the comfort and freedom of a small minority of Muslim women who wear it.

Ritual Slaughter Restrictions: Only a small number of destinations have restrictions on ritual slaughter, which may limit the availability of halal food options for Muslim travelers.

Over the last four years, the average scores for faith restrictions have shown a positive trend, with scores increasing from 88.2 in 2021 to 90.7 in 2024.

General Safety

It assesses several aspects to determine the overall safety and inclusiveness of Muslim travelers, focusing on the prevalence of hate crimes, hate speeches, and the perception of Islamophobia.

Hate Crimes and Hate Speeches: Hate crimes and hate speeches directed at Muslims have seen an increase in various parts of the world. These incidents can range from verbal abuse and discriminatory remarks to physical assaults and vandalism of properties associated with Muslims, such as mosques. Hate speeches often propagated through social media and other platforms, contribute to a hostile environment that can make Muslim travelers feel unwelcome and unsafe.

Perception of Islamophobia: The perception of Islamophobia plays a significant role in the general safety evaluation. The increase in Islamophobic incidents globally has raised concerns among Muslim travelers regarding their safety and acceptance in different destinations.

The average scores for General safety have fluctuated over the past four years. This could be attributed to the impact of global incidents.

Sustainability Evaluation

The Sustainability evaluation assesses destinations' commitment to sustainable initiatives. It is also a key dimension in the RIDA framework. This evaluation encompasses socio-economic, environmental, and socio-cultural dimensions, providing a view of a destination's sustainability efforts. The criteria evaluated are Socio-Economic, Environmental, and Socio-Cultural.

Over the past few years, the average scores for sustainability have shown a positive trend, increasing from 44 in 2022 to 48 in 2024. This improvement indicates a growing commitment among destinations to adopt sustainable practices across socio-economic, environmental, and socio-cultural dimensions.

Accessibility

The new Accessibility evaluation assesses how well destinations cater to the diverse needs of travelers, particularly focusing on the ease of access to essential services and amenities. As destinations increasingly recognize the importance of accessibility, there have been noticeable improvements in this area. Efforts to enhance the accessibility of transportation and public spaces contribute to a more inclusive environment, allowing travelers with diverse needs to enjoy their experiences without barriers.

GMTI 2024 ACES Rankings - Services

The Services pillar of the ACES framework evaluates the availability and quality of services that cater to the specific needs of Muslim travelers.

Prayer Places

The availability of prayer facilities is a fundamental aspect of the faith-based needs of Muslim travelers. While OIC destinations naturally excel in this area, it is encouraging to see non-OIC destinations recognizing the importance of such amenities and making efforts to provide them. As more destinations invest in creating inclusive environments for Muslim travelers, the global travel landscape becomes more welcoming and accommodating, fostering greater cultural understanding and mutual respect.

The top non-OIC destinations with prayer facilities this year are Bosnia, Rwanda, Singapore, Sri Lanka, Seychelles, South Africa, Tanzania, Kenya, India, and Uganda.

Halal Dining

OIC destinations are well-catered to meet the dietary needs of Muslim travelers, with numerous halal restaurants, food outlets, and grocery stores readily available. This extensive availability ensures that Muslim tourists can enjoy their culinary experiences without concerns about dietary restrictions.

It is encouraging to see non-OIC destinations like Singapore, the UK, South Africa, and Taiwan making substantial efforts to cater to this need. Among non-OIC destinations, certain destinations have made significant strides in increasing the availability of halal food establishments. Notable destinations include Singapore, United Kingdom (UK), South Africa and Taiwan. In these destinations, the growth of halal food options is evident, with a variety of restaurants and food outlets catering to Muslim travelers. Cities such as London and New York City are also witnessing an expansion of halal cuisine offerings. Like Singapore, these cities are now offering a diverse range of halal culinary experiences.

In recognition of the growing importance of halal cuisine and its role in enhancing the travel experience for Muslim travelers, HalalTrip has launched the HalalTrip Gastronomy Awards.

Muslim-friendly Airports

Airports play a crucial role for many travelers, particularly for Muslim travelers. The availability of halal food options, prayer rooms, and ablution (wudu) facilities at airports significantly enhances the travel experience for Muslim travelers. While airports in OIC destinations generally meet the needs of Muslim travelers, many non-OIC destination airports lack these facilities. It's important for more airports to provide essential amenities such as prayer rooms and halal food options in transit sections and public areas.

Some top non-OIC destinations that offer good amenities for Muslims at airports include Singapore, Hong Kong, Thailand, South Africa, and Japan. Airports are the first point of contact for many travelers, and having the necessary amenities to cater to Muslim travelers significantly enhances their travel experience. This metric evaluates the presence of halal food options, prayer rooms, and ablution (wudu) facilities at airports.

Muslim-Friendly Hotels

The provision of Muslim-friendly hotel services is a significant area for improvement within the global hospitality industry. With an average score of 29, it is one of the lowest among the GMTI metrics. It is clear that there is substantial work to be done to meet the needs of Muslim travelers adequately. By focusing on enhancing hotel services to be more inclusive and respectful of Muslim practices, destinations can greatly improve their attractiveness and competitiveness in the growing Muslim travel market.

Heritage & Experience

The Heritage & Experience metrics are crucial for providing travelers with unique and enriching experiences that connect them to the cultural and historical essence of a destination. While there is a significant emphasis on this area, the stable scores suggest that more concerted efforts are needed to fully realize the potential of these experiences. For Muslim travelers, in particular, connecting with Islamic heritage can provide a deeper, more meaningful travel experience. Destinations should continue to invest in promoting and enhancing their cultural heritage, ensuring that all travelers can enjoy and appreciate the richness of their history and traditions.

Halal Food Diversity: Expanding Options for Muslim Consumers

The halal food scene has witnessed tremendous growth, reflecting evolving demands and preferences within the global Muslim community. Today, Muslim consumers seek not just halal food establishments, but a diverse culinary landscape offering varied cuisines and gourmet experiences..

Diverse Culinary Experiences

Cities such as Singapore, Kuala Lumpur (KL), Jakarta, and London have emerged as hotspots for halal food diversity. This shift has led to a broader range of halal culinary experiences:

- **International Cuisines:** In these cities, halal-certified restaurants offer diverse international cuisines, ranging from Middle Eastern and Indian to Japanese and Italian. This variety caters to a broader range of taste preferences, enriching the culinary experiences of Muslim consumers.
- **Halal Bakeries and Cafes:** In addition to traditional dining, the halal food scene includes bakeries, baristas, and specialty cafes. These establishments serve halal-friendly pastries, coffee, and other delights, contributing to the culinary diversity in cities worldwide.
- **Growth in Gourmet Options:** Muslim consumers increasingly seek gourmet halal options, from fine dining establishments to artisanal food markets. The growing demand has led to an increase, further diversifying the culinary landscape.



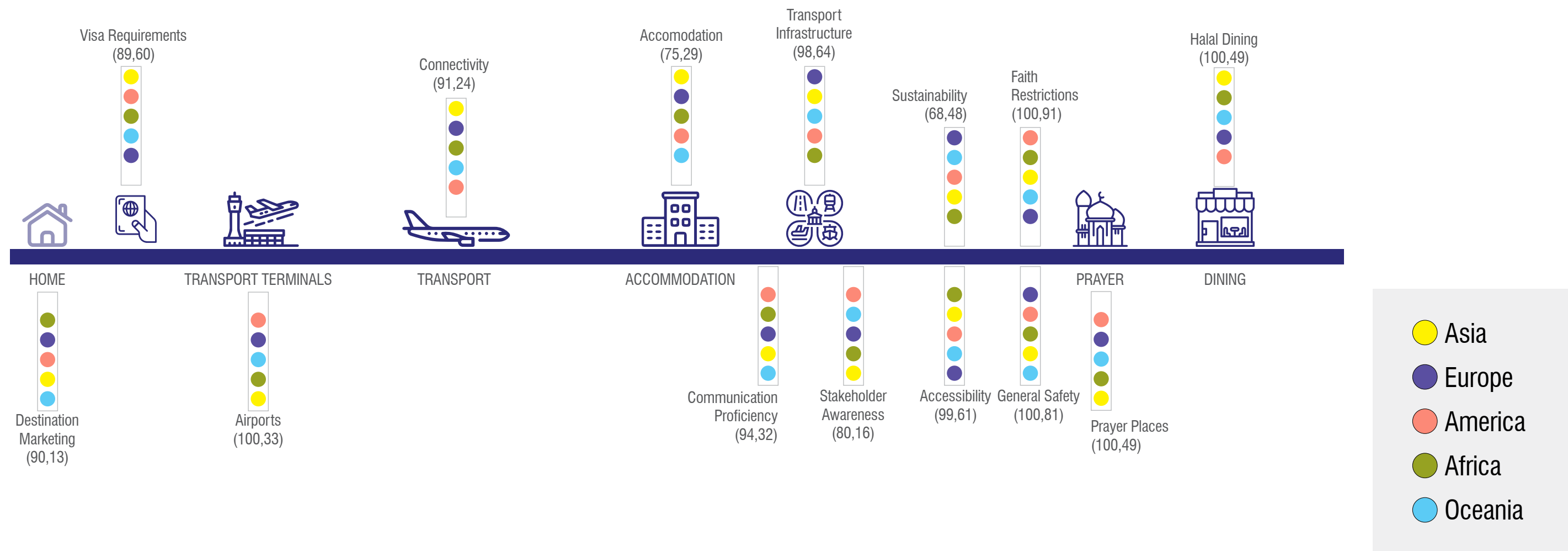
HalalTrip Gastronomy Awards:

Recognizing the growth of halal food diversity, HalalTrip launched the HalalTrip Gastronomy Awards in Singapore, in partnership with the Singapore Halal Culinary Federation. This initiative celebrates outstanding halal food establishments, emphasizing innovation and quality in the halal culinary scene.

- **Diamond Awards:** The HalalTrip Gastronomy Awards is introducing the prestigious Diamond Awards, honoring top restaurants that excel in providing diverse, high-quality halal cuisine. This recognition celebrates the culinary achievements and innovation within the halal food industry.
- **Best-in-Class awards:** The awards acknowledge excellence across various categories, including halal restaurants, bakeries, cafes, and specialty establishments. This reflects the breadth of halal food options now available to Muslim consumers.
- **Expanding to other cities:** HalalTrip plans to roll out the HalalTrip Gastronomy Awards to other major cities, further expanding the reach and recognition of halal food diversity worldwide.

Key Touchpoints of a Muslim Traveler: Discovering Highlights and Opportunities

This page presents a visual representation of the ACES framework's criteria along a traveler's journey, showcasing how each aspect influences the travel experience from beginning to end. For each touchpoint, it plots the overall average score and the average score of different regions. This comparison provides valuable insights into how various destinations perform relative to each other, highlighting key areas for improvement and offering an overview of the travel experience for Muslim travelers.



*(Maximum GMTI 2024 score, Average GMTI 2024 score)

08

Muslim Women Friendly Destinations



Muslim Women Friendly destinations

In the evolving global travel landscape, the GMTI 2024 continues to highlight and expand on a crucial segment: Muslim Women-Friendly destinations. Recognizing Muslim women's unique needs and growing influence in the travel sector, this year's GMTI further emphasizes the importance of creating travel environments that cater specifically to Muslim women.

Growing Influence and Market Potential: Muslim women constitute a significant portion of the Muslim travel market. This demographic has demonstrated considerable influence, particularly in family and couple travel scenarios, where their input in planning and decision-making is almost double compared to other travel groups.

Trends and Preferences: The trend towards solo and group travel among Muslim women, which saw a rise pre-COVID, has accelerated as travel restrictions have eased. This shift underscores a broader demand for destinations that respect cultural and religious practices and actively support women travelers' safety.

Key Criteria in Destination Assessment: The GMTI assesses Muslim Women-Friendly destinations using a set of tailored criteria integrated into the ACES model's Environment dimension. These criteria focus on:

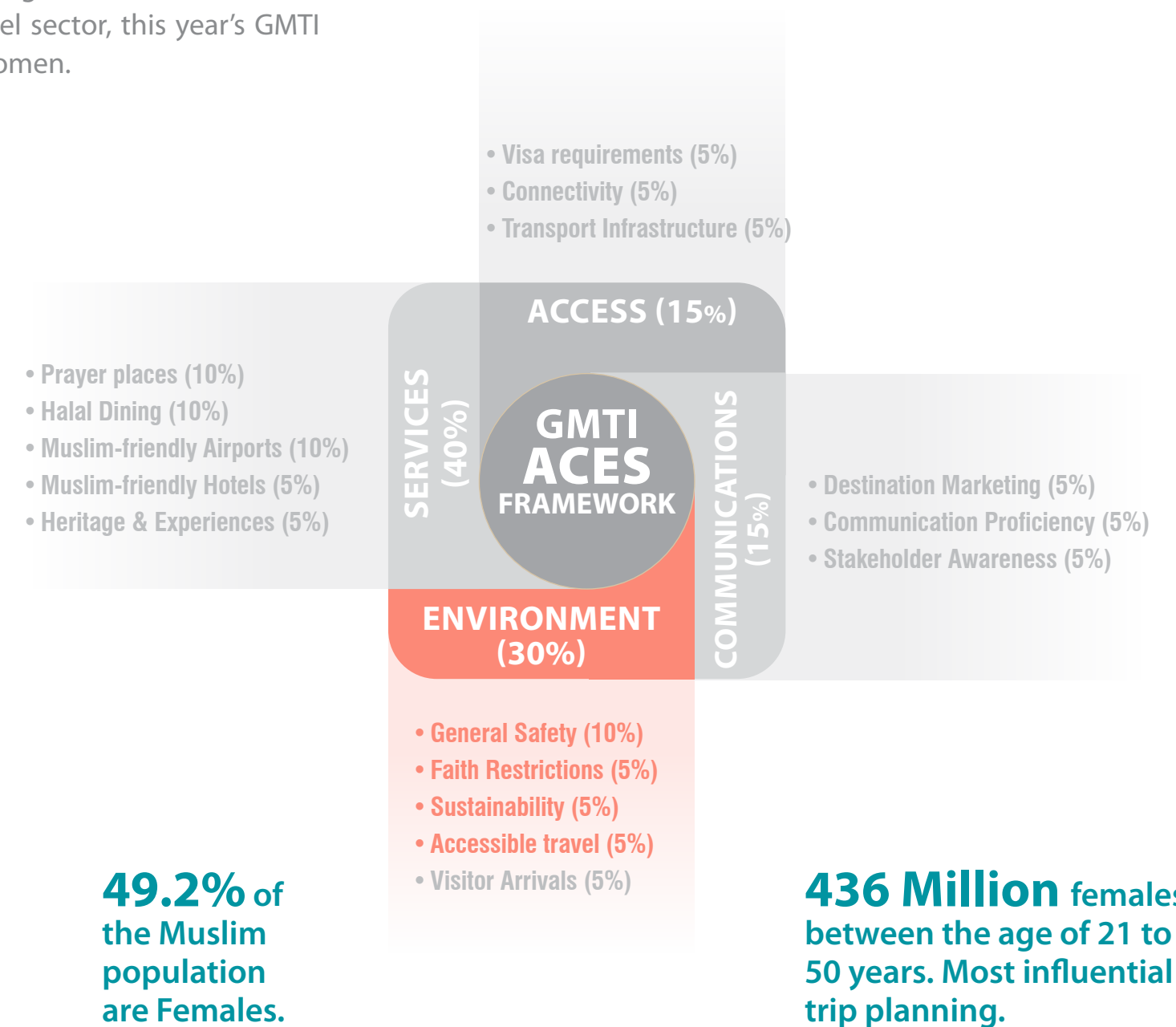
Faith Restrictions: Evaluating how destinations accommodate religious practices and attire without imposing restrictions.

Safety: Ensuring that the destinations are safe for women travelers, addressing concerns from street safety to harassment.

Sustainability: Incorporating sustainable practices that align with the values of Muslim women travelers, such as eco-friendly tourism options and community-based tourism that benefits local women.

Accessible travel: Accessible travel metrics are also included in the calculation of Muslim women-friendly destinations.

The above criteria are evaluated along with the total GMTI scores



Muslim Women Friendly destinations - Top 20 non-OIC Destinations

This year's list highlights destinations from various regions, each making significant strides in providing a welcoming and supportive environment. The inclusion of a broader range of destinations shows a growing global awareness and effort to meet the unique needs of Muslim women travelers.

Singapore continues to reign as the top non-OIC destination, maintaining its impressive score from last year. This achievement underscores the consistent efforts to provide a supportive and welcoming environment for Muslim women travelers, instilling confidence in their ability to lead.

A unique aspect of the Asian region is that besides Singapore, the other destinations are all East Asian destinations, a clear sign that these destinations offer a high level of safety, sustainability, and no faith restriction to enable inclusivity. All four destinations—Hong Kong, Taiwan, Japan, and South Korea—have consistently put safety as a key focus.

In conclusion, these non-OIC destinations provide notable performance. This result emphasizes the widespread acknowledgment of the importance of accommodating Muslim women travelers, indicating a recognition that extends beyond geographical and cultural confines.

Destination	Index Score
Singapore	81
Hong Kong	78
Taiwan	76
Ireland	76
Japan	76
Portugal	76
Luxembourg	75
Iceland	74
Croatia	74
South Korea	73
Georgia	73
Andorra	72
New Zealand	72
Malta	72
Czechia	72
Cyprus	72
Uruguay	71
Chile	70
Botswana	70
Mauritius	70

Muslim Women Friendly destinations - Top 20 OIC Destinations

The result reveals a nuanced picture of how various regions are progressing in making their destinations more Muslim Women-Friendly. The high ranking destinations are predominantly located in Southeast Asia (Malaysia, Indonesia, Brunei, and the Maldives), the Middle East (Qatar, Turkey, Saudi Arabia, the United Arab Emirates, Oman, Kuwait, and Iran), and Central Asia (Azerbaijan, Kyrgyzstan, and Uzbekistan). This demonstrates a strong representation from Asia that is traditionally known for their Muslim-majority populations and cultural compatibility with Muslim travelers.

Malaysia and Indonesia share the highest score of 82, establishing themselves as the leading Muslim Women Friendly destination in OIC Countries. Despite a five-point decrease from the highest score the previous year, due to the impact of Accessible travel metrics, they continue to attract Muslim women due to several key factors: their emphasis on safety, absence of faith-based restrictions, and commitment to sustainable socio-economic practices.

The third position is still held by Qatar, providing high levels of general safety and no faith restrictions. Brunei and the Maldives follow, rounding out the top five with secure environments and full faith compatibility. Destinations as Turkey, Saudi Arabia, UAE, Azerbaijan, and Kuwait also offer strong safety and faith-based offerings.

Senegal, Sierra Leone, and Morocco become the only destinations from Africa that join this lists. Their representation highlights the region's potential and ongoing efforts to cater to this specific market segment.

Each of these destinations, with their distinct attractions, consistently provides a comfortable, secure, and faith-friendly environment for Muslim women.

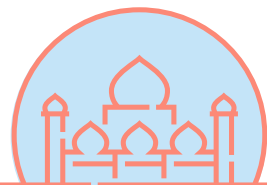
Destination	Index Score
Malaysia	82
Indonesia	82
Qatar	80
Brunei	79
Maldives	79
Turkey	78
Saudi Arabia	76
United Arab Emirates (UAE)	76
Azerbaijan	76
Kuwait	74
Oman	74
Senegal	74
Iran	73
Kyrgyzstan	73
Sierra Leone	72
Uzbekistan	71
Jordan	71
Bahrain	70
Morocco	70
Bangladesh	69

GenZ Muslim Women | Very Influential in Trip Planning

Influential

Over
70%

heavily involved in family travel plans.



HIGHLY SPIRITUAL

74% Would love to experience Islamic heritage tours.

Authenticity seekers

Almost 70% prefer cultural immersion activities

63% seek opportunities to learn something new in their travels.



Drivers for change

76% find social causes to be important in their travels



Safety and security major concerns

Upto 95% need comfortable travel climates free from hate crimes

DEMAND FOR PRIVACY

80%-90% require female-only prayer rooms

Almost **60%** feel very strongly about women-only spas

More than **40%** require women-only beaches

CONNECTED

More than
80% need **social media** during their trip.



SEEKING AFFORDABLE VENTURES

53% spend up to USD 150 per day during their trips

Source: Mastercard-CrescentRating Muslim Gen Z Travel report 2023

09

GMTI 2024 Results Tables



GMTI 2024 Results Tables

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			ENVIRONMENT (30%)					Services (40%)				
	2024 Rank	2024 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	General Safety	Faith Restrictions	Sustainability	Accessibility	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage & Experiences	Accommodation
Albania	34	50	23	74	60	16	20	47	92	60	46	63	7	60	90	33	10	27
Algeria	26	56	26	43	47	70	4	40	84	80	42	45	4	89	100	67	22	26
Andorra	97	36	10	51	81	14	12	4	92	100	50	89	2	20	30	0	10	21
Argentina	143	28	2	60	57	3	8	2	64	100	45	68	0	25	10	0	11	23
Armenia	85	37	59	67	57	33	4	0	81	100	44	75	11	30	30	0	8	4
Aruba	107	35	1	51	76	28	8	0	84	100	49	53	1	20	30	17	10	32
Australia	39	48	7	56	75	66	50	9	83	80	53	91	13	47	30	46	21	32
Austria	75	39	50	51	86	41	4	12	79	26	57	85	12	47	25	9	11	38
Azerbaijan	20	61	81	66	77	25	13	40	84	100	52	70	20	70	100	63	15	36
Bahamas	97	36	2	68	76	61	12	0	84	100	45	64	1	25	25	0	10	22
Bahrain	17	63	36	67	77	72	0	39	84	100	43	19	59	70	100	100	10	44
Bangladesh	25	57	28	55	56	12	8	40	84	100	31	38	26	85	100	87	10	36
Belgium	51	44	56	51	72	34	4	12	88	40	59	80	5	60	50	20	14	27
Belize	115	34	1	58	40	44	12	0	84	100	47	82	0	25	30	0	10	22
Benin	58	42	7	61	72	12	0	16	84	100	43	62	27	25	70	33	11	17
Bolivia	135	30	1	74	50	4	0	0	84	100	43	45	0	21	25	0	10	23
Bosnia and Herzegovina	43	47	21	66	45	19	12	34	84	60	46	77	21	55	80	32	14	34
Botswana	97	36	0	75	72	25	4	2	92	100	42	74	1	25	30	0	12	22
Brazil	123	33	5	66	55	2	15	0	74	100	58	62	2	34	25	0	23	23
Brunei	9	66	21	67	66	53	7	32	92	100	43	69	41	90	100	100	10	51
Bulgaria	67	40	48	51	62	11	4	12	82	60	52	78	33	29	50	18	14	24
Burkina Faso	85	37	10	48	42	12	4	32	64	100	38	38	20	25	70	33	10	17
Cabo Verde	128	31	1	71	60	1	0	2	84	100	43	77	2	15	25	0	10	22
Cambodia	97	36	7	64	54	14	51	4	84	100	46	30	6	25	30	27	11	15
Cameroon	58	42	11	38	50	38	2	12	76	60	46	64	19	40	90	33	10	23
Canada	64	41	20	42	77	64	4	16	48	60	49	88	5	47	50	37	23	28
Chad	53	43	9	40	36	22	4	24	76	60	31	37	2	40	70	93	10	32
Chile	85	37	1	60	74	4	12	0	84	100	48	92	1	50	25	0	15	24
China	82	38	78	42	89	1	21	4	66	30	68	43	17	30	30	19	59	23
Colombia	115	34	3	75	57	1	14	0	76	100	55	89	1	21	25	7	9	24
Costa Rica	128	31	3	62	61	5	20	0	89	100	50	59	1	17	10	0	10	23

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Cote d'Ivoire	58	42	9	57	62	18	0	16	84	100	46	56	27	40	60	33	10	22
Croatia	67	40	14	51	70	34	4	9	88	100	61	93	12	35	25	6	10	41
Cuba	128	31	4	44	62	4	20	0	84	100	54	74	2	27	10	0	10	23
Cyprus	53	43	14	51	64	38	20	16	84	100	52	83	6	40	70	0	10	23
Czechia	97	36	49	51	73	9	0	0	87	100	53	97	6	25	10	0	15	24
Denmark	107	35	33	51	83	41	4	12	62	40	56	95	10	35	25	9	10	22
Dominican Republic	115	34	5	64	62	1	16	0	84	100	45	47	3	25	10	33	10	23
Ecuador	123	33	1	87	64	19	4	0	84	100	52	65	1	22	10	11	10	23
Egypt	12	65	37	63	80	88	12	40	81	80	37	16	55	85	100	100	39	39
El Salvador	135	30	1	71	55	4	4	0	84	100	40	47	1	20	25	0	10	22
Estonia	85	37	18	51	73	40	8	0	88	86	56	95	3	19	10	28	10	23
Eswatini (formerly Swaziland)	135	30	0	60	49	19	4	0	84	100	44	30	1	25	30	0	10	15
Ethiopia	85	37	30	60	64	1	8	16	76	100	45	37	13	30	25	43	12	25
Fiji	75	39	1	63	55	20	12	12	92	100	46	31	5	35	50	30	10	15
Finland	75	39	20	51	84	33	20	4	70	80	58	98	4	25	25	33	9	23
France	46	46	56	51	83	32	13	12	43	40	66	75	25	55	50	46	53	37
Gambia	46	46	5	79	49	2	2	40	84	100	39	34	4	50	100	33	10	28
Georgia	35	49	73	83	73	20	0	12	81	100	50	90	46	35	50	33	10	25
Germany	39	48	57	51	74	37	12	17	55	60	58	81	17	55	50	53	49	35
Ghana	85	37	12	42	57	46	8	12	92	100	42	32	31	30	10	33	10	22
Greece	67	40	61	51	68	23	4	12	74	80	49	81	39	20	40	13	19	29
Guam	85	37	0	46	57	64	8	0	84	100	50	52	0	25	30	33	10	17
Guatemala	140	29	1	68	46	4	0	0	84	100	46	28	1	18	10	17	11	22
Guinea-Bissau	67	40	1	67	43	1	0	24	84	100	46	42	24	44	50	33	10	22
Honduras	145	27	1	67	49	4	4	0	84	100	43	40	0	20	10	0	10	13
Hong Kong	29	54	16	82	98	31	56	9	92	100	45	96	0	55	30	80	10	37
Hungary	107	35	28	51	70	8	4	0	69	100	51	78	15	20	25	20	10	23
Iceland	67	40	8	51	68	69	20	2	100	84	59	95	4	15	10	33	10	22
India	75	39	48	47	62	15	6	12	24	50	40	58	39	43	50	47	53	39
Indonesia	1	76	30	81	78	48	85	80	92	100	45	66	30	98	100	100	31	75
Iran	7	67	69	69	77	31	5	40	76	100	48	57	59	85	100	100	48	35

GMTI 2024 Results Tables

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			ENVIRONMENT (30%)					Services (40%)				
	2024 Rank	2024 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	General Safety	Faith Restrictions	Sustainability	Accessibility	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage & Experiences	Accommodation
Ireland	39	48	26	51	70	72	4	4	89	100	55	96	4	30	50	53	10	29
Italy	58	42	52	51	67	9	12	12	64	60	64	86	26	33	25	33	62	38
Jamaica	97	36	3	62	64	71	20	0	84	100	46	39	2	30	30	0	10	23
Japan	39	48	19	60	97	8	35	5	92	100	64	74	4	40	10	67	31	46
Jordan	7	67	65	76	71	94	5	40	84	100	41	14	51	80	100	100	27	38
Kazakhstan	21	59	59	79	59	36	4	32	84	80	45	40	89	81	90	60	17	30
Kenya	53	43	18	63	64	11	4	12	81	100	50	38	13	40	60	47	12	24
Kuwait	12	65	80	59	58	70	0	32	92	100	38	31	38	80	100	100	10	46
Kyrgyzstan	21	59	61	82	49	24	0	40	84	100	46	57	95	75	90	47	14	28
Laos	128	31	3	61	54	12	8	0	92	100	43	48	3	21	25	0	10	14
Latvia	85	37	24	51	67	42	8	0	82	46	54	93	1	25	30	27	11	23
Lebanon	21	59	32	69	41	92	8	32	75	100	42	20	36	70	100	93	15	34
Lesotho	128	31	0	64	47	17	0	0	84	100	39	75	2	15	25	0	10	22
Lithuania	97	36	18	51	73	28	8	0	82	100	53	75	2	25	25	9	10	23
Luxembourg	58	42	41	51	89	82	12	4	92	100	50	99	6	25	25	0	10	21
Madagascar	140	29	1	48	31	2	4	4	84	100	44	37	2	35	25	0	12	22
Malawi	115	34	0	59	48	1	4	12	84	100	45	46	5	40	50	0	10	22
Malaysia	1	76	55	89	74	71	63	63	92	100	44	69	49	95	100	100	9	73
Maldives	14	64	23	67	49	58	20	40	84	100	43	98	24	84	100	87	10	45
Mali	35	49	19	46	48	10	6	40	76	100	39	77	17	64	100	33	20	22
Malta	64	41	12	51	63	65	20	0	84	100	48	96	4	35	30	17	10	23
Mauritius	58	42	14	79	68	11	20	12	92	100	46	53	6	38	50	27	10	27
Mexico	135	30	8	54	59	6	4	0	75	100	51	43	7	30	10	0	32	23
Mongolia	115	34	14	56	47	1	16	4	92	100	47	31	6	30	50	0	11	21
Montenegro	107	35	17	64	55	1	20	16	92	100	49	59	10	30	25	0	10	22
Morocco	14	64	26	79	62	63	12	47	84	80	47	48	13	77	100	100	28	59
Mozambique	82	38	1	63	60	11	0	12	84	100	42	34	2	40	50	33	10	26
Namibia	123	33	2	64	71	10	8	0	84	100	41	79	1	15	30	0	10	22
Nepal	107	35	26	67	50	24	20	12	84	100	45	51	13	25	25	0	10	22
Netherlands	64	41	47	51	94	32	4	12	51	60	52	92	13	49	50	14	13	26
New Zealand	53	43	6	46	66	68	35	4	88	90	58	90	5	52	25	17	10	24

GMTI 2024 Results Tables

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			ENVIRONMENT (30%)					Services (40%)				
	2024 Rank	2024 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	General Safety	Faith Restrictions	Sustainability	Accessibility	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage & Experiences	Accommodation
Nicaragua	128	31	1	77	55	19	4	0	84	100	46	59	0	20	10	0	10	23
Nigeria	35	49	17	53	44	61	8	31	75	100	45	23	36	55	90	50	10	31
North Macedonia (formerly Macedonia)	82	38	14	60	54	1	12	24	88	80	46	63	14	40	50	13	10	17
Norway	97	36	20	51	71	63	20	12	74	66	59	74	8	25	25	0	10	23
Oman	9	66	82	68	75	71	8	40	92	100	42	22	16	85	100	100	10	47
Pakistan	17	63	37	58	63	55	0	40	76	100	27	39	54	90	100	100	23	35
Panama	128	31	2	68	72	7	8	2	84	100	47	49	1	25	10	0	10	23
Paraguay	143	28	0	58	42	4	8	0	84	100	51	26	0	20	25	0	10	22
Peru	135	30	1	62	51	4	12	0	84	100	50	57	1	24	10	0	12	24
Philippines	43	47	16	77	51	41	51	36	83	100	43	31	6	47	50	40	10	47
Poland	107	35	45	51	70	19	0	0	71	100	53	79	5	25	25	9	16	23
Portugal	67	40	16	51	79	19	21	2	91	100	64	99	12	30	10	20	16	29
Puerto Rico	107	35	1	42	79	33	12	0	84	100	49	86	2	25	25	0	9	23
Qatar	6	71	87	84	80	70	8	32	92	100	40	71	38	90	100	100	12	53
Reunion	67	40	0	39	41	11	4	4	92	100	43	41	2	50	100	3	10	22
Romania	107	35	23	51	56	22	0	7	88	100	52	70	2	25	30	3	10	23
Russia	67	40	60	2	62	36	12	19	42	80	47	85	7	40	50	37	36	32
Rwanda	75	39	4	69	71	9	0	4	84	100	42	57	3	40	75	0	12	22
Saudi Arabia	3	74	91	60	76	64	16	52	84	100	46	37	99	95	100	100	18	64
Senegal	30	53	14	63	56	25	0	40	84	100	40	85	8	65	100	53	10	26
Serbia	115	34	18	72	62	34	0	12	74	100	48	77	15	35	10	0	10	10
Seychelles	85	37	8	75	46	15	20	4	92	100	42	41	0	25	70	0	11	22
Sierra Leone	33	51	1	64	44	60	4	32	92	100	41	49	12	60	80	60	10	24
Singapore	9	66	29	76	98	66	55	29	92	100	47	85	31	90	70	87	10	35
Slovakia	126	32	11	51	60	10	0	0	82	86	50	95	2	25	10	9	10	23
Slovenia	97	36	15	51	66	51	12	4	88	80	56	96	8	30	10	0	10	23
South Africa	43	47	15	73	62	20	27	21	73	100	39	18	4	60	60	67	14	34
South Korea	48	45	23	62	93	11	50	0	92	100	61	60	6	42	25	43	15	28
Spain	35	49	47	51	81	7	57	9	88	60	62	81	42	50	25	33	66	39
Sri Lanka	48	45	29	56	59	43	20	12	82	80	45	39	14	51	70	30	8	42

GMTI 2024 Results Tables

	GMTI		ACCESS (10%)			COMMUNICATION (20%)			ENVIRONMENT (30%)					Services (40%)				
	2024 Rank	2024 Score	Connectivity	Visa Requirements	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	General Safety	Faith Restrictions	Sustainability	Accessibility	Visitor Arrivals	Halal Dining	Prayer Places	Airport	Heritage & Experiences	Accommodation
Sudan	26	56	28	47	65	61	4	40	75	100	40	17	19	90	100	60	10	41
Suriname	85	37	0	61	43	61	12	12	84	100	42	69	3	24	10	33	11	30
Sweden	97	36	18	51	82	41	35	12	42	84	59	94	10	32	25	7	14	20
Switzerland	48	45	55	51	96	54	12	12	67	40	56	84	12	55	50	30	12	29
Taiwan	28	55	12	55	83	26	90	17	92	100	41	83	2	60	50	63	10	65
Tajikistan	30	53	46	77	64	26	4	40	84	20	44	40	49	70	95	60	13	33
Tanzania	51	44	16	64	66	17	8	40	84	100	46	48	9	60	60	17	12	32
Thailand	32	52	46	73	66	19	34	24	82	100	48	19	32	55	50	80	11	42
Togo	85	37	3	67	43	14	0	12	84	100	46	35	24	25	50	33	10	22
Trinidad and Tobago	85	37	2	67	58	69	21	12	84	100	45	49	3	30	30	7	10	22
Tunisia	19	62	35	75	47	92	4	40	80	80	44	54	71	80	100	67	25	35
Turkiye	4	73	77	77	75	35	16	52	76	100	59	75	71	80	100	100	54	59
Uganda	75	39	8	62	66	3	4	12	84	100	47	36	4	25	50	53	10	18
Ukraine	140	29	1	2	62	20	0	4	62	100	44	84	2	30	10	15	9	23
United Arab Emirates (UAE)	5	72	91	71	89	87	4	32	84	100	43	47	80	80	100	100	10	67
United Kingdom (UK)	24	58	46	54	74	72	15	47	48	100	57	89	42	70	70	61	38	46
United States of America (USA)	53	43	19	42	86	67	29	16	26	100	49	70	19	55	35	37	32	30
Uruguay	115	34	1	57	68	15	8	0	92	100	51	79	1	19	25	0	10	23
Uzbekistan	14	64	50	76	67	27	35	52	84	100	42	25	83	75	90	80	29	40
Vietnam	75	39	15	57	64	36	33	0	91	100	48	50	6	30	25	26	10	31
Zambia	126	32	2	63	60	8	8	2	84	100	47	37	8	20	25	13	10	22
Zimbabwe	115	34	0	65	60	57	0	2	84	100	43	48	2	30	30	0	10	14

10

Technical Notes & Acknowledgements



Technical Notes

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.
- Number of data sets based on trusted third-party data & 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, Passport Index, Vision of Humanity, and IQ Air..

Data Utilization and Projections

GMTI utilizes data primarily from the current year, with this report incorporating data from 2023 and early 2024. The cut-off date for data used in this report is the end of March 2024, ensuring the most up-to-date information is included.

Data from Recent Years: In some instances, certain datasets may not be available for the current year. In these cases, GMTI resorts to using data from the most recent previous years. This ensures a comprehensive overview of the travel industry, avoiding significant data gaps.

Two-Pronged Approach: To maintain the comprehensiveness and reliability of the index when specific data for a destination is unavailable, GMTI adopts a two-pronged approach:

- **Projections:** This method leverages historical data patterns from the destination to estimate current figures. By analyzing past trends, GMTI provides a calculated and informed estimate, filling in gaps where necessary.
- **Proxies:** In situations where strong similarities exist between destinations in cultural, economic, or travel patterns, GMTI uses a similar destination's data as a proxy. This approach ensures that data reflects realistic patterns, allowing one destination to reasonably represent another.

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.

Strategic Navigation with the GMTI Performance Matrix (GPM)

The GMTI Performance Matrix (GPM) is a pivotal analytical tool in the Global Muslim Travel Index, providing essential insights into how global destinations perform and tap into the Muslim travel market. By integrating GMTI scores with the percentage of Muslim visitor arrivals, the GPM offers a detailed overview of a destination's effectiveness in catering to and attracting Muslim travelers.

Matrix Configuration: The GPM organizes destinations into four distinct quadrants, each named to reflect the specific characteristics of the destinations within them:

Quadrant I - Trailblazers: High GMTI Score / High Muslim Visitor Percentage

Quadrant II - Emerging Destinations: High GMTI Score / Low Muslim Visitor Percentage

Quadrant III - Potential Leaders: Low GMTI Score / Low Muslim Visitor Percentage

Quadrant IV - Untapped Potential: Low GMTI Score / High Muslim Visitor Percentage

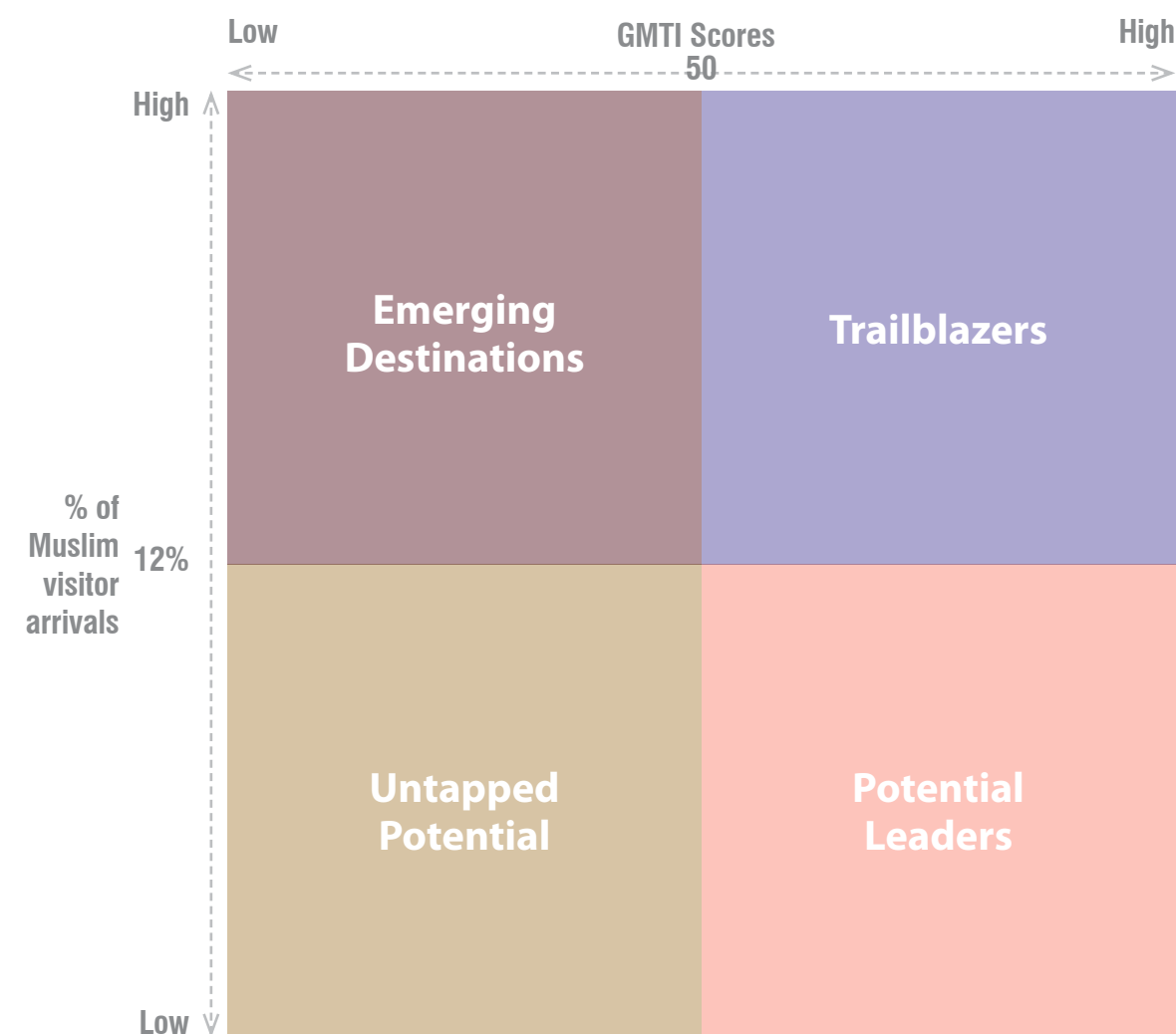
These categories enable destinations to clearly understand their current standing in the Muslim travel market and identify strategic areas for growth and improvement.

Strategic Application: The GPM serves as a roadmap for destinations to refine their offerings and marketing strategies to better connect with Muslim travelers:

Enhancing Services and Infrastructure: For destinations like those in Quadrant II (Emerging Destinations) and Quadrant IV (Untapped Potential), there is a clear incentive to elevate service quality and infrastructure to better meet the needs of Muslim travelers and move towards Quadrant I (Trailblazers).

Focused Marketing and Outreach: Destinations in Quadrant III (Potential Leaders) and Quadrant IV (Untapped Potential) can benefit from targeted marketing campaigns designed to increase their visibility among Muslim travelers and potentially shift their position to a higher quadrant.

The midpoint for GMTI scores is set at 50, establishing an industry benchmark, while the midpoint for Muslim visitor arrivals has been set to 12%.



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Foreword

Trends, Opportunities
& Key Takeaways

The RIDA
Framework

Accessible
Travel

Muslim Demographics &
Travel Market Economy

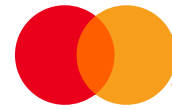
GMTI 2024
Overview

GMTI 2024
Results

Muslim Women
Friendly Destinations

GMTI 2024
Results Table

Technical Notes &
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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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Top Destination of The Year
Top Destination of The Year (non-OIC)
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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 Women-friendly Destination of 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

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 Gen Z Destination of Year
Muslim Millennial Destination of The Year

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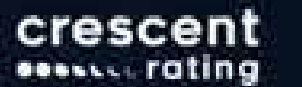
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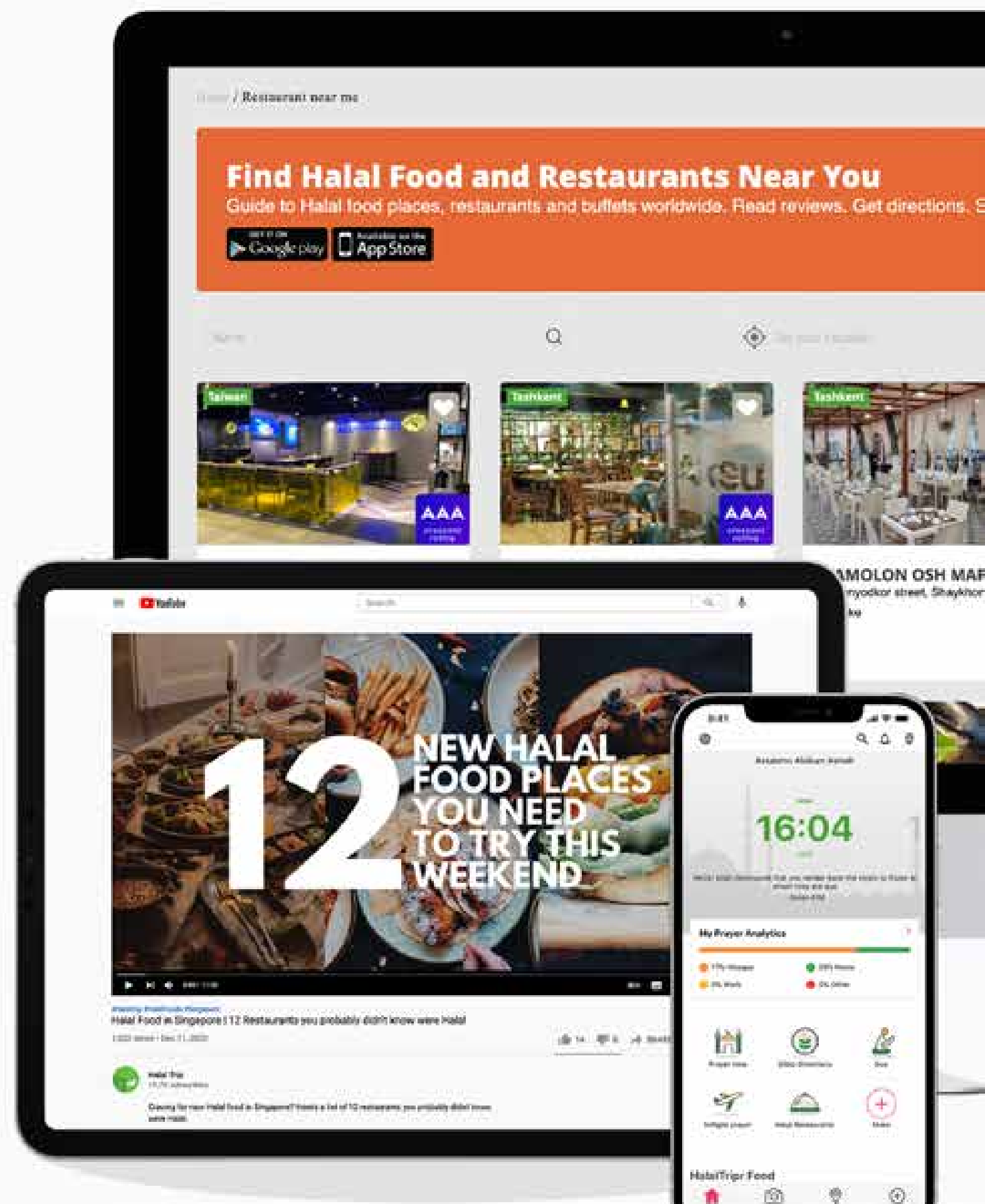


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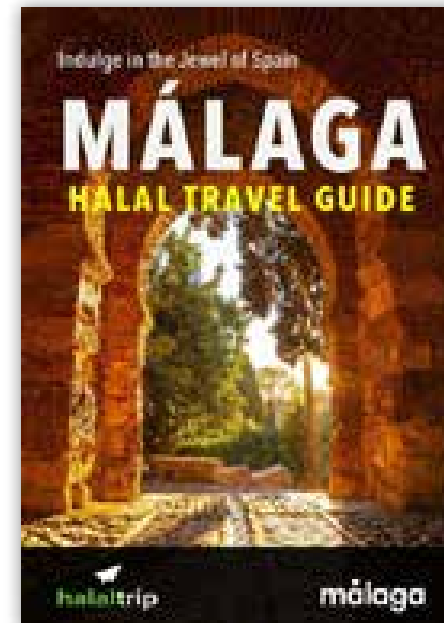
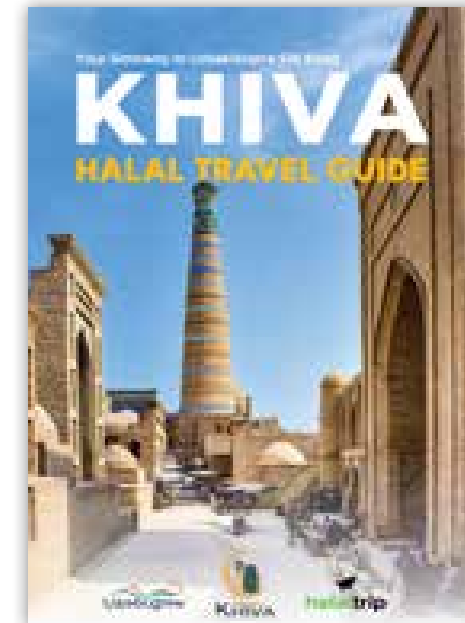
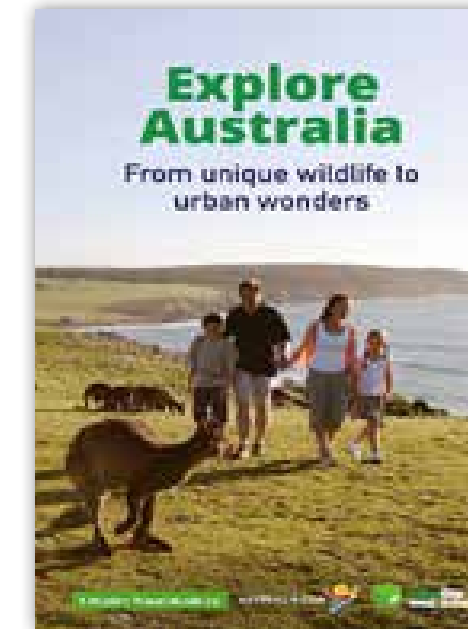
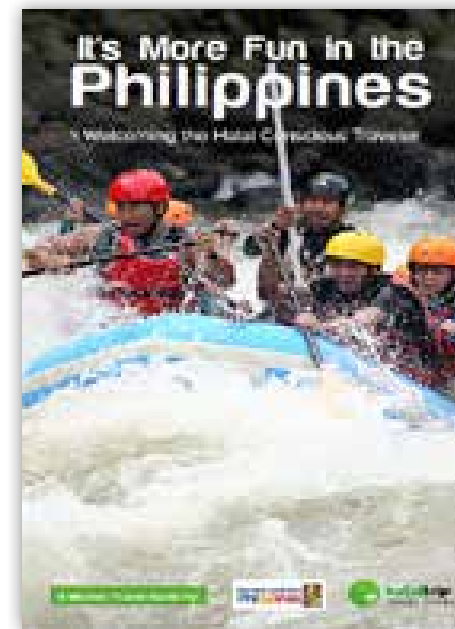




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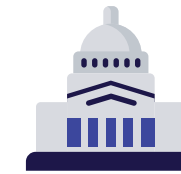
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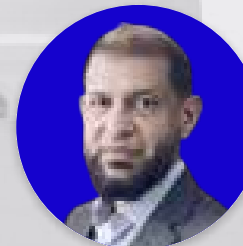
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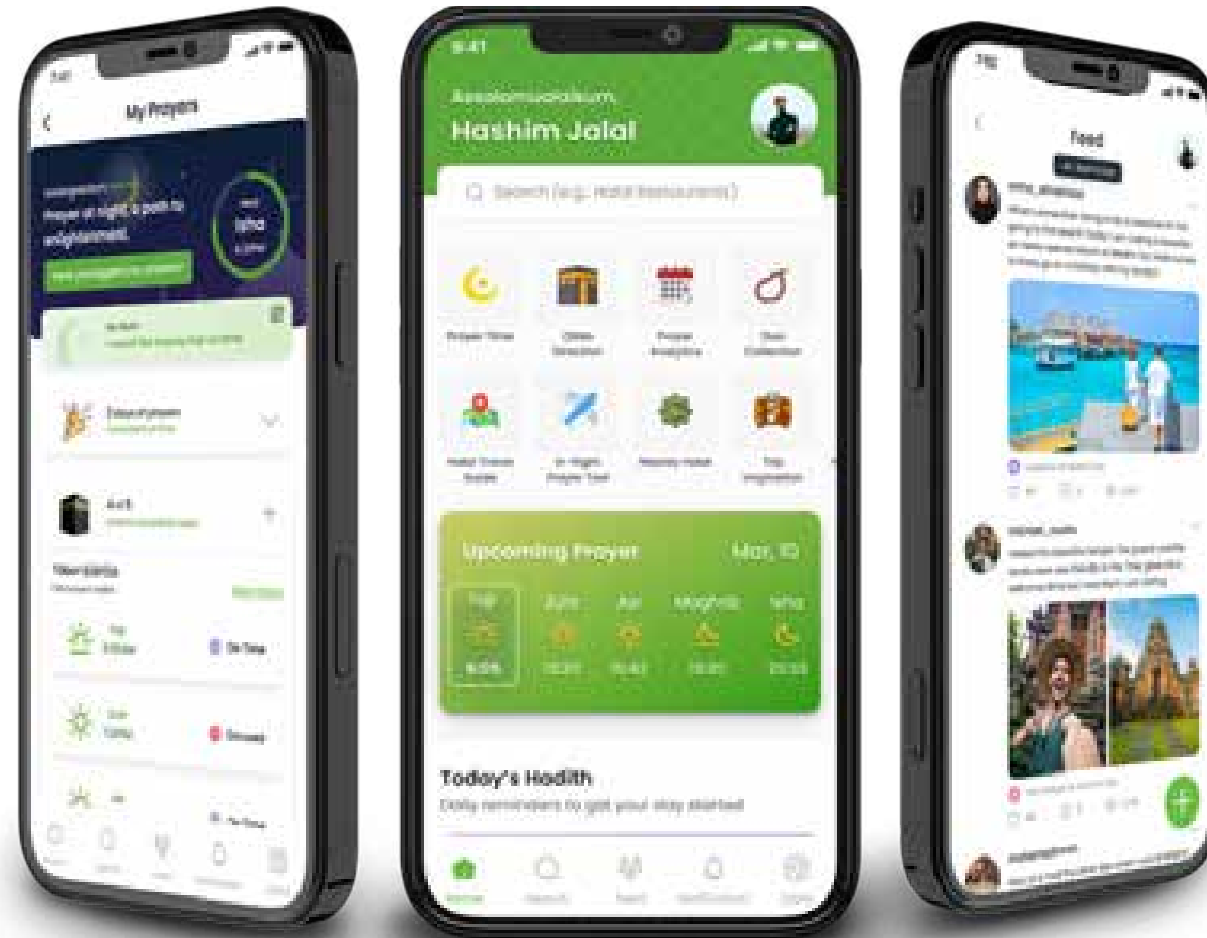
Raudha Zaini
Strategic Partnerships & Projects Lead of CrescentRating & HalalTrip

- 1 Unveiling Halal Tourism: A Gateway to Global Opportunities
- 2 Economic Powerhouse: The Financial Pillars of Halal Tourism
- 3 Benchmarking Success: Navigating with GMTI and ACES
- 4 Crafting Excellence with RIDA: Elevating Muslim-Friendly Services
- 5 Perfecting Assurance: The Heart of the RIDA Framework for Muslim Travelers
- 6 Culinary Delights: Mastering the Art of Halal Cuisine
- 7 Touchpoint Mastery: Enhancing Every Step of the Halal Journey
- 8 Marketing Mastery in Halal Tourism: Strategies, Technology, and Authenticity
- 9 Pioneering Progress: Confronting Challenges, Embracing Opportunities



Get inspired • Go • Inspire others

Every Muslim's Lifestyle App



**Available in multiple languages*



HALALTRIP INSPIRATION JOURNEY MAP

Muslim travelers are able to use the HalalTrip application to plan for all phases of their travel journey. Trip planning begins by getting inspired of the latest buzz and activities the destination has to offer. Upon immersing themselves in the destination, travelers can then share their stories online and inspire others.



Travel Videos

Travel inspiration from the comfort of your home.

Get featured when you share yours with us!



HalalTrip.com

We do the research for you.

Best Muslim-friendly places to eat, pray and explore.



City Guides

These offline guides will save you when Wi-fi won't!



Travel Etiquettes and Dua

Begin your trip with Bismillah.

Supplications for all your travel needs.



Inflight Prayer Calculator

Math can be tough but not when we do the calculations for you.



Search Nearby

The food on your flight might be *plane* but our nearby locator will get you to the nearest Halal eatery in a jiffy.



HalalTrip Feed

Share your travels and be a part of the HalalTrip family.



Prayer Analytics

Your physical health is important but so is your spiritual well-being.

Track them from day to day.

feels like home



HOMES & HOTELS

Muslim-friendly accommodation options

travel with a peace of mind



VACATIONS

Choose from a wide range of Crescent Rated tour packages

spend less save more



ACTIVITIES & EXPERIENCES

Exclusive discounts to popular attractions.

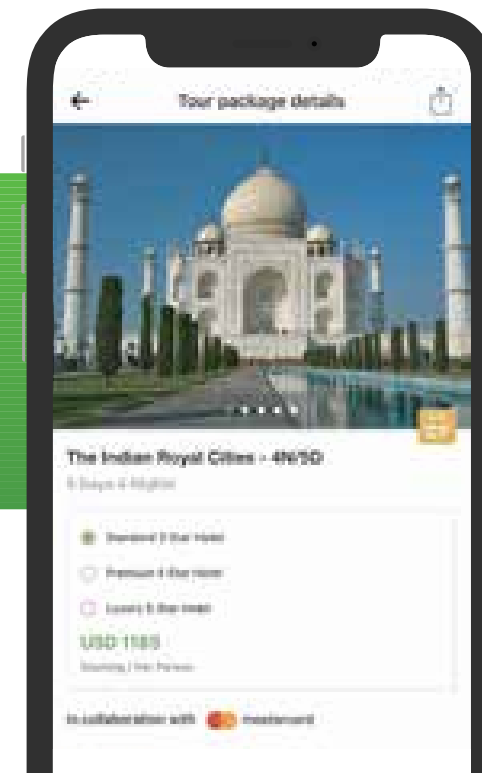




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