



MasterCard-CrescentRating Global Muslim Travel Index 2016

By MasterCard & CrescentRating

March 2016





C R E S C E N T
R A T I N G

Global Muslim Travel Index 2016

(GMTI 2016)

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Table of Contents

The Muslim Travel Market	4
The Muslim Traveler	6
MasterCard-CrescentRating Global Muslim Travel Index (GMTI)	10
GMTI 2016 Results	13
GMTI 2016 Criteria Overview	23
GMTI Scores Table	27

About CrescentRating



CrescentRating is a leading authority on Halal-friendly travel. The company uses insights, 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.

Formed in 2008, CrescentRating services are used by every tier of the tourism industry globally, from government bodies and tourism agencies to hospitality service providers, to inform how they can meet and serve the needs of the Muslim traveler.

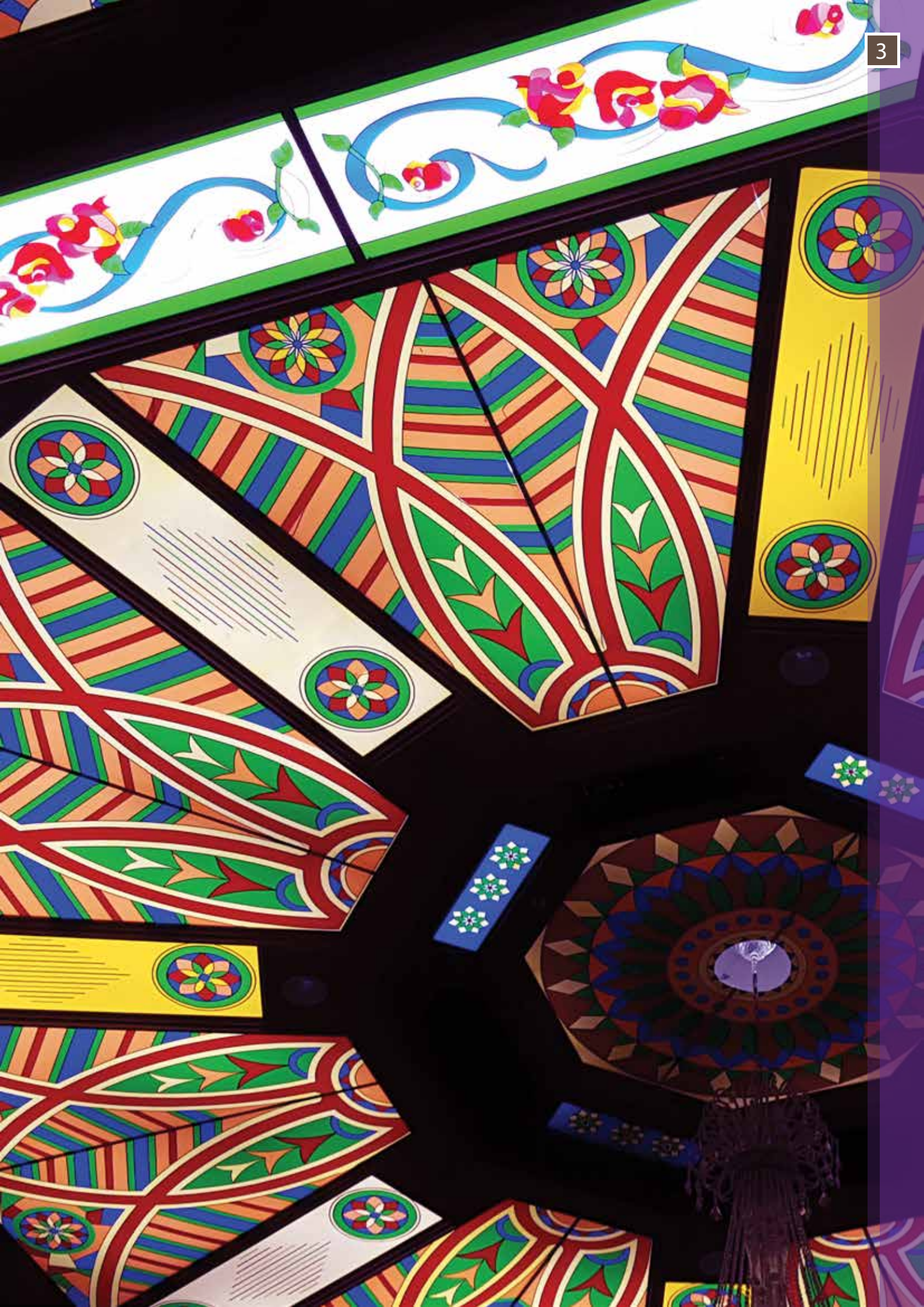
CrescentRating's services include rating & accreditation, research & consultancy, workshops & training, ranking & indices, destination marketing, event support/partnerships and content provisioning. HalalTrip and Muslim Travel Warehouse are sister companies of CrescentRating Pte. Ltd.

About MasterCard



MasterCard is a technology company in the global payments industry. MasterCard operates the world's fastest payments processing network, connecting consumers, financial institutions, merchants, governments and businesses in more than 210 countries and territories.

MasterCard's products and solutions make everyday commerce activities - such as shopping, traveling, running a business, and managing finances - easier, more secure, and more efficient for everyone.



The Muslim Travel Market

The Muslim travel market continues to be one of the fastest growing segments in the global travel industry. In 2015, it was estimated that there were 117 million Muslim international travelers. This is projected to grow to 168 million by 2020, where the travel expenditure by Muslim travelers is expected to exceed USD 200 billion.

Key Drivers of Muslim Travel Market Growth

Some of the key drivers for the continued growth of the Muslim travel market are:

- ▶ **Growing Muslim population:** The Muslim population is growing rapidly and is expected to make up 26 percent of the world's population by 2030. This translates to one out of three people born between 1990 and 2030 being Muslim.
- ▶ **Growing middle class / Disposable income:** The middle class in countries with large Muslim populations are increasing. These include Gulf countries, Indonesia, Malaysia, Turkey, Nigeria and Bangladesh. The 2nd and 3rd generation of Muslims in Western Europe and North America are also becoming highly educated and entering the professional work force. All of this is increasing the disposable income of a large Muslim consumer base.
- ▶ **Younger population:** According to Pew research, "Muslims are also the youngest (median age of 23 years old in 2010) of all major religious groups, seven years younger than the median age of non-Muslims." They are better informed and are actively influencing the travel planning of their family holidays.
- ▶ **Increasing access to travel information:** The proliferation of Internet access coupled with high penetration of smartphones have made travel planning easier in general. Muslim majority countries such as Saudi Arabia and the UAE are among the top countries when it comes to smartphone penetration. A younger more technology-savvy population also means more Muslims are active on social media and use it to get information.
- ▶ **Increasing availability of Muslim-friendly travel services and facilities:** The last few years have seen many businesses and destinations beginning to adapt their products and services to cater to Muslim travelers. This has meant that there is an increasing availability of Muslim-friendly services. Halal food is available in many major cities now.

Key drivers of Muslim travel market growth

- ▶ Population growth
- ▶ Growing middle class
- ▶ Younger population
- ▶ Increasing access to travel information
- ▶ Increasing availability of Muslim-friendly travel services and facilities

In order to keep track of this growing market segment, the **MasterCard-CrescentRating Global Muslim Travel Index (GMTI)**, now in its second year, looks at in-depth data covering 130 destinations, creating an overall index to benchmark how destinations are catering to the Muslim travel market. GMTI 2016 will continue to provide travelers, destinations and travel services, as well as investors, comprehensive benchmarks across a number of criteria, to track the health and the growth of this travel segment.

Pew Research Centre Forum on Religious and Public Life (2014); The Future of the Global Muslim Population; Washington, DC USA, Pew Research



The Muslim Traveler

The profile of the Muslim traveler has often been over-simplified in the past. A few years ago, outbound Muslim travel was primarily focused on a few specific destinations while other destinations did not possess an adequate understanding of the requirements of Muslim travelers.

The behavior and the profile of Muslim travelers have changed over the last two decades. They are increasingly looking at destinations with high levels of services which take into account their unique needs. They are also looking at destinations which are safe for Muslims, as both real and perceived safety have become a high priority. A few destinations – namely Malaysia, Dubai and Turkey – have been able to benefit from this changing behavior, as they have begun to offer Muslim travelers accommodation, facilities and services that cater to their needs.

Faith-based needs of Muslim Travelers

Six faith-based needs are identified as the main areas for Muslim travelers. While the majority of Muslim travelers adhere to some of these needs, the level of importance varies among Muslims.

- ▶ **Halal Food:** Halal food is by far the most important service that a Muslim traveler looks out for when traveling. Acceptability of the different levels of Halal food assurance varies among Muslims. The acceptability also varies depending on the region the Muslim travelers are coming from. Having food outlets with proper Halal assurance that is easily identifiable is the preferred option sought by Muslim visitors from Southeast Asia and Western Europe.
- ▶ **Prayer Facilities:** Prayer is one of the central elements of Islamic practice and worship and it is the second of the five pillars of Islam. According to the Pew Research Centre report, 63 percent of Muslims perform the five daily prayers. While traveling, some of them will combine some prayers and perform them three times a day.

In order to cater to this need, the services and facilities that are frequented by Muslim travelers need to be equipped with prayer rooms. Another important consideration is the cleansing ritual referred to as Wudhu. Wudhu is performed before a Muslim performs their prayers. This requires the prayer rooms to have “foot washing” facilities.

- ▶ **Water-usage Friendly Washrooms:** For Muslims, water plays a key role in purity and cleanliness, both of which are core aspects of the faith. Physical cleanliness is stressed as an essential component of being a Muslim. As such, special attention is given to hygiene in the washroom. This entails the use of water in the toilets, and it is discomforting for Muslim travelers where the setup for water use is not available. Providing such facilities has become less cumbersome now with the widespread availability of hand showers, bidets or even Japanese-style toilets. Common in Muslim countries as well as South and Southeast Asian countries, the hand shower is a plumbing fixture placed in a holder against a wall by the toilet.

Key faith-based needs of muslim travelers

- ▶ Halal Food
- ▶ Prayer facilities
- ▶ Ramadhan services
- ▶ Water-friendly washrooms
- ▶ No non-Halal activities
- ▶ Recreational facilities & services with privacy

- ▶ **Ramadhan Services:** Although Muslims are less likely to travel during the month of Ramadhan, there are still many looking to spend this time away from home, especially if this period coincides with school holidays. In addition, an increasing number of Muslims take holiday breaks during the two Muslim festivals. Destinations looking to attract Muslim travelers during this period need to be able to accomodate their special needs during the month of fasting. One such example is the catering of pre-dawn Halal meals by hotels.
- ▶ **No Non-Halal Activities:** Muslims consider some activities to be 'Haram' or non-Halal. When it comes to traveling, these are generally centered on requiring a family-friendly environment. As such, some Muslims would prefer to avoid facilities that serve alcohol, have discotheques or is adjacent to a gambling resort.
- ▶ **Recreational Facilities and Services with Privacy:** A sub-segment of Muslim travelers are also looking for recreational facilities that provide privacy for males and females. These include the following:
 - ▶ Swimming pools and gyms that provide privacy for male and female use.
 - ▶ Beaches, which provide areas for males and females to enjoy in privacy.
- ▶ **Segmentation of Muslim Travelers Based on Faith-Based Needs:** Muslim travelers are not homogeneous in their adherence to the faith-based needs discussed above. In order to cater to these needs from a services perspective, service providers can look at grouping these needs into "Need to have", Good to have" and "Nice to have".

Need to have

- ▶ Halal food services
- ▶ Salaath (prayer) facilities

Good to have

- ▶ Water-usage friendly washrooms
- ▶ Ramadhan (fasting) services & facilities

Nice to have

- ▶ No non-Halal activities
- ▶ Recreational facilities and services





MasterCard-CrescentRating Global Muslim Travel Index (GMTI)

The first edition of the MasterCard-CrescentRating Global Muslim Travel Index (GMTI) was released in March 2015 and covered 100 destinations. This year the GMTI 2016 looks at in-depth data covering 130 destinations. Two new criteria – air connectivity and visa restrictions – have been added to further enhance the Index.

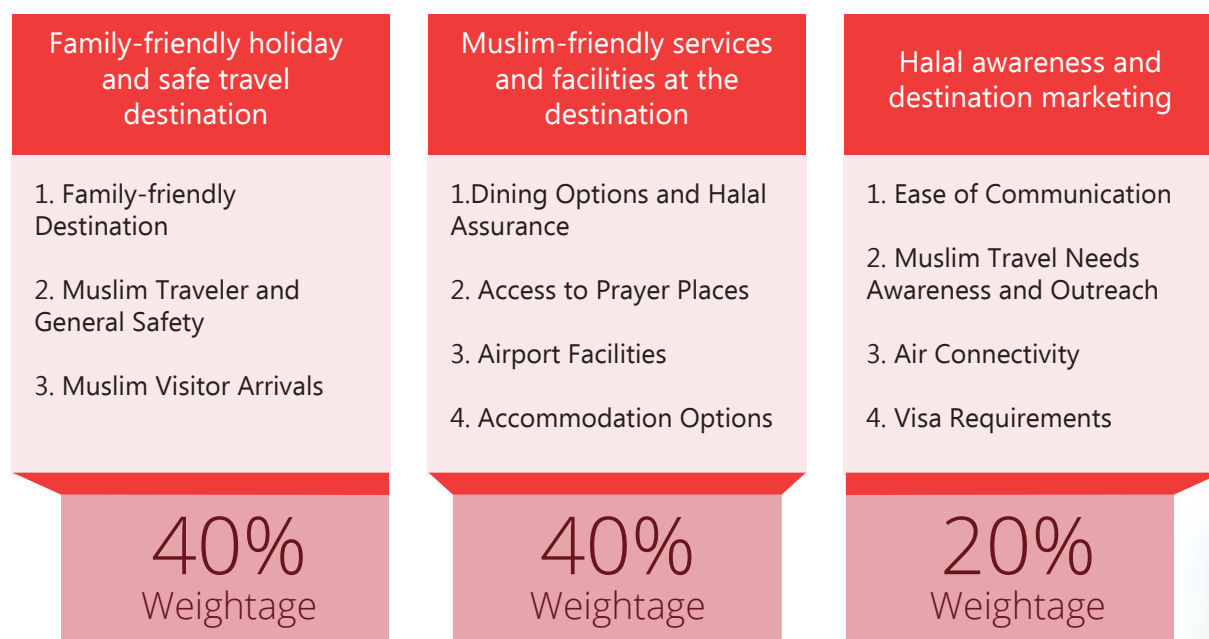
GMTI 2016 will be the most comprehensive research on the Muslim travel market. It will continue to be an invaluable tool in understanding how Muslim travel is influencing the overall travel market. The GMTI provides every stakeholder in the travel and hospitality sector, including travelers, tourism boards, economists, travel services providers, stakeholders, investors and industry specialists with comprehensive benchmarks across a number of important criteria to track the health and the growth of this travel segment.

It helps destinations to better benchmark the services they offer and use the detailed analysis to improve their strategies to attract the Muslim traveler. In addition, travelers can use the information to make educated choices when planning trips.

The criteria used in GMTI 2016 centers around the following three themes:

- ▶ Family-friendly holiday and safe travel destination
- ▶ Muslim-friendly services and facilities at the destination
- ▶ Halal awareness and destination marketing

Each of these themes are looked at from a set of eleven main criteria. Each of the criteria are weighted averages of more than 25 sub-criteria.



The 130 destinations ranked in this report covers 48 OIC destinations and 82 non-OIC destinations. These 130 destinations represent more than 95 percent of Muslim visitor arrivals in 2015.

Africa	Asia	Americas	Europe
Algeria	Azerbaijan	Argentina	Albania
Benin	Bahrain	Aruba	Andorra
Burkina Faso	Bangladesh	Bahamas	Austria
Cameroon	Brunei	Bolivia	Belgium
Chad	Cambodia	Brazil	Bosnia and Herzegovina
Comoros	China	Canada	Bulgaria
Djibouti	Cyprus	Chile	Croatia
Egypt	Georgia	Colombia	Czech Republic
Gabon	Hong Kong	Costa Rica	Denmark
Gambia	India	Cuba	Estonia
Guinea	Indonesia	Dominican Republic	Finland
Guinea-Bissau	Iran	Ecuador	France
Ivory Coast	Japan	El Salvador	Germany
Kenya	Jordan	Guam	Greece
Mali	Kazakhstan	Guatemala	Hungary
Mauritius	Kuwait	Guyana	Ireland
Morocco	Kyrgyzstan	Jamaica	Italy
Mozambique	Laos	Mexico	Latvia
Niger	Lebanon	Nicaragua	Lithuania
Nigeria	Malaysia	Panama	Luxembourg
Senegal	Maldives	Peru	Malta
Sierra Leone	Oman	Puerto Rico	Netherlands
Somalia	Pakistan	Suriname	Norway
South Africa	Philippines	United States	Poland
Sudan	Qatar	Uruguay	Portugal
Swaziland	Saudi Arabia		Romania
Tanzania	Singapore		Russian Federation
Togo	South Korea		Slovak Republic
Tunisia	Sri Lanka		Slovenia
Uganda	Taiwan		Spain
Zimbabwe	Tajikistan		Sweden
	Thailand		Switzerland
	Turkey		Ukraine
Oceania	Turkmenistan		United Kingdom
Australia	United Arab Emirates		
New Zealand	Uzbekistan		
Fiji	Vietnam		



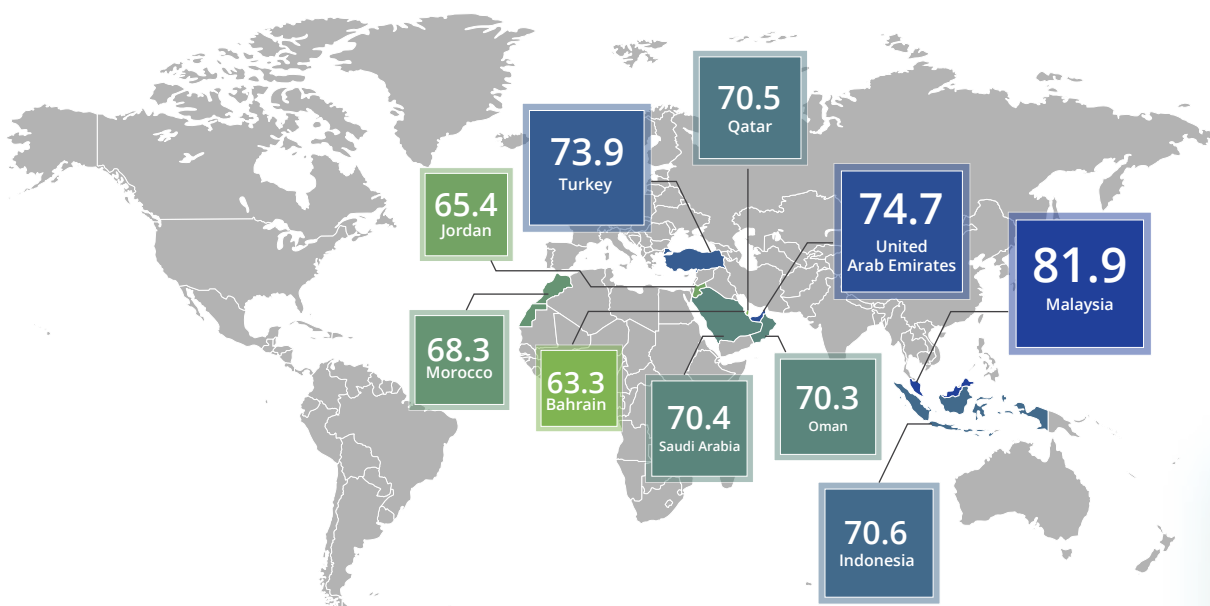
Global Muslim Travel Index (GMTI) 2016 Results

Against the backdrop of additional criteria, Malaysia continues to top the GMTI this year. It is the sixth year in a row that Malaysia has ranked number one having topped the previous rankings produced by CrescentRating since 2011. Malaysia has consistently been able to maintain its standing amongst the main three themes of (1) Family-friendly holiday and safe travel destination (2) Muslim-friendly services and facilities at the destination, and (3) Halal awareness and destination marketing.

United Arab Emirates has overtaken Turkey to take the second spot, while Indonesia has improved its ranking to move to 4th place. Among the non-OIC countries, Singapore retained its top position while Taiwan and Japan have continued to improve their overall ranking.

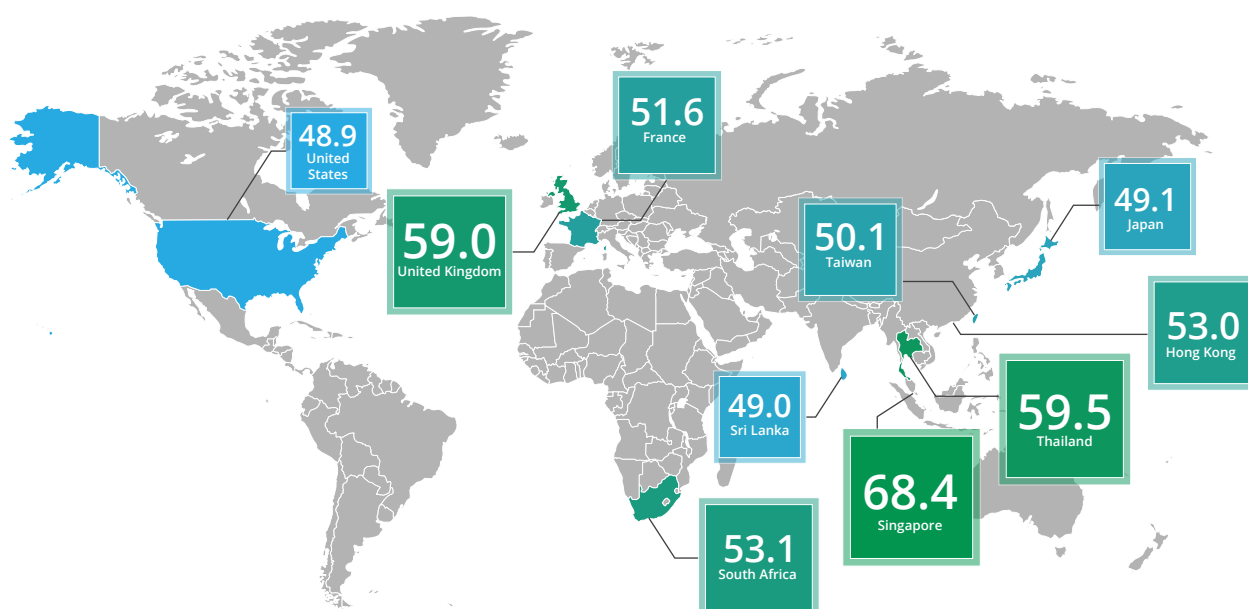
Top 10 OIC Destinations

Rank	GMTI 2016 Rank	Destination	Score
1	1	Malaysia	81.9
2	2	United Arab Emirates	74.7
3	3	Turkey	73.9
4	4	Indonesia	70.6
5	5	Qatar	70.5
6	6	Saudi Arabia	70.4
7	7	Oman	70.3
8	9	Morocco	68.3
9	10	Jordan	65.4
10	11	Bahrain	63.3



Top 10 non-OIC Destinations

Rank	GMTI 2016 Rank	Destination	Score
1	8	Singapore	68.4
2	20	Thailand	59.5
3	21	United Kingdom	59.0
4	30	South Africa	53.1
5	31	Hong Kong	53.0
6	31	France	51.6
7	33	Taiwan	50.1
8	34	Japan	49.1
9	35	Sri Lanka	49.0
10	36	United States	48.9



Although OIC destinations have a distinct advantage due to having Muslim-friendly facilities and services, some non-OIC destinations are specifically targeting the “Muslim Holiday” market and adapting their services to attract them. GMTI 2016 shows that many non-OIC destinations are moving up the ranking at a faster pace.

Regional Analysis of GMTI 2016 Scores

The comparison of average GMTI scores by region shows Asia is the leading region, with Europe also seeing an improvement in scores. The GMTI table below shows the average scores for each region.

Score Comparison by Region	Americas	Europe	Africa	Oceania	Asia	GMTI Average
2016 GMTI Average Score	31.6	39.2	43.1	43.1	56.5	43.7
2015 GMTI Average Score	30.4	36.9	44.9	41.6	55.1	43.8
Family-friendly Destination	47.2	51.3	38.9	50.9	47.3	46.4
Muslim Traveler and General Safety	80.0	81.9	76.5	90.7	84.6	81.2
Muslim Visitor Arrivals	3.5	13.1	12.5	5.4	27.2	14.9
Dining Options & Halal Assurance	16.7	29.3	48.8	36.0	61.0	40.7
Access to Prayer Spaces	20.6	26.9	68.9	24.7	71.5	48.4
Airport Facilities	15.0	22.5	31.8	41.9	60.3	34.5
Accommodation Options	18.6	24.1	17.6	21.7	37.3	25.2
Ease of Communication	25.5	35.9	28.6	61.6	43.5	34.9
Muslim Travel Needs Awareness and Outreach	5.0	11.5	18.8	24.6	31.0	17.8
Air Connectivity	7.8	40.8	18.2	13.3	53.0	31.9
Visa Requirements	64.7	59.2	59.6	62.8	67.8	62.9

OIC vs Non-OIC GMTI 2016 Comparison

At a macro level, the Muslim population can be segmented by those in Muslim-majority countries and those living as sizeable minorities. Whilst the Muslim tourism market is sizeable and an attractive growth market, it is geographically distributed and culturally diverse. These variances have implications on differences even within Muslim travelers in terms of tourism destination preferences, travel habits, and patterns. The following table gives the Top 20 OIC and non-OIC destinations.

OIC			Non-OIC		
Rank	Destination	Score	Rank	Destination	Score
1	Malaysia	81.9	8	Singapore	68.4
2	United Arab Emirates	74.7	20	Thailand	59.5
3	Turkey	73.9	21	United Kingdom	59.0
4	Indonesia	70.6	30	South Africa	53.1
5	Qatar	70.5	31	Hong Kong	53.0
6	Saudi Arabia	70.4	32	France	51.6
7	Oman	70.3	33	Taiwan	50.1
9	Morocco	68.3	34	Japan	49.1
10	Jordan	65.4	35	Sri Lanka	49.0
11	Bahrain	65.3	36	United States	48.9
12	Brunei	64.6	37	Spain	48.8
13	Kuwait	64.1	38	India	48.7
14	Tunisia	63.7	39	Belgium	48.1
15	Iran	63.6	43	Germany	46.8
16	Kazakhstan	63.3	44	Australia	46.6
17	Egypt	63.1	46	Philippines	45.7
18	Maldives	61.8	47	Switzerland	45.6
19	Bangladesh	60.0	48	Bosnia and Herzegovina	45.3
22	Algeria	58.5	49	Russian Federation	45.1
23	Azerbaijan	57.3	50	China	44.5

Comparison of 2016 & 2015 Top 20 OIC Average Score

Overall scores of OIC countries have marginally improved. The most notable improvement in 2016 was seen in Muslim Visitor Arrivals, with significant decline in Muslim Travel Needs Awareness and Outreach due to low promotional activity except in a few countries.

Top 20 OIC	2016 Score	2015 Score
Top 20 OIC Average GMTI	66.6	65.8
Family-friendly Destination	45.2	45.7
Muslim Traveler and General Safety	84.4	89.9
Muslim Visitor Arrivals	38.9	29.8
Dining Options & Halal Assurance	82.0	81.8
Access to Prayer Spaces	99.0	99.0
Airport Facilities	77.9	76.9
Accommodation Options	45.3	46.2
Ease of Communication	59.6	58.7
Muslim Travel Needs Awareness and Outreach	33.1	49.2
Air Connectivity	57.4	-
Visa Free Travel	69.5	-

Comparison of 2016 & 2015 Top 20 non-OIC Average Score

The average score for the Top 20 non-OIC countries has improved. This clearly illustrates the efforts taken by non-OIC destinations to improve their Muslim-friendly services.

Top 20 non-OIC	2016 Score	2015 Score
Top 20 non-OIC Average GMTI	50.3	47.7
Family-friendly Destination	61.2	60.4
Muslim Traveler and General Safety	78.7	86.1
Muslim Visitor Arrivals	22.2	15.0
Dining Options & Halal Assurance	45.6	44.7
Access to Prayer Spaces	42.3	41.3
Airport Facilities	45.9	44.2
Accommodation Options	31.5	32.0
Ease of Communication	48.8	51.6
Muslim Travel Needs Awareness and Outreach	30.6	31.9
Air Connectivity	56.2	-
Visa Free Travel	62.4	-

2015 and 2016 GMTI40 Comparison

GMTI40 tracks the average score of the Top 20 OIC and Top 20 non-OIC destinations to form a key index to monitor the performance of the Muslim travel segment. The overall Average GMTI Score for Top 20 non-OIC destinations has improved to 50.3 in comparison to 47.7 last year which indicates that overall destinations are gearing up and competing for a share of the Muslim travel market.

GMTI40 March 2015

56.7

GMTI40 March 2016

58.5

2016 GMTI40 Includes these Destinations

OIC			non-OIC		
Rank	Destination	Score	Rank	Destination	Score
1	Malaysia	81.9	8	Singapore	68.4
2	United Arab Emirates	74.7	20	Thailand	59.5
3	Turkey	73.9	21	United Kingdom	59.0
4	Indonesia	70.6	30	South Africa	53.1
5	Qatar	70.5	31	Hong Kong	53.0
6	Saudi Arabia	70.4	32	France	51.6
7	Oman	70.3	33	Taiwan	50.1
9	Morocco	68.3	34	Japan	49.1
10	Jordan	65.4	35	Sri Lanka	49.0
11	Bahrain	65.3	36	United States	48.9
12	Brunei	64.6	37	Spain	48.8
13	Kuwait	64.1	38	India	48.7
14	Tunisia	63.7	39	Belgium	48.1
15	Iran	63.6	43	Germany	46.8
16	Kazakhstan	63.3	44	Australia	46.6
17	Egypt	63.1	46	Philippines	45.7
18	Maldives	61.8	47	Switzerland	45.6
19	Bangladesh	60.0	48	Bosnia and Herzegovina	45.3
22	Algeria	58.5	49	Russian Federation	45.1
23	Azerbaijan	57.3	50	China	44.5

Comparison of the Average Scores for the Top 20 OIC and non-OIC Destinations

GMTI 40	Top 20 OIC Average	Top 20 non-OIC Average	GMTI 40 Average
GMTI Avg Score	66.6	50.3	58.5
Family-friendly Destination	45.2	61.2	53.2
Muslim Traveler and General Safety	84.4	78.7	81.6
Muslim Visitor Arrivals	38.9	22.2	30.6
Dining Options & Halal Assurance	82.0	45.6	63.8
Access to Prayer Spaces	99.0	42.3	70.7
Airport Facilities	77.9	45.9	61.9
Accommodation Options	45.3	31.5	38.4
Ease of Communication	59.6	48.8	54.2
Muslim Travel Needs Awareness and Outreach	33.1	30.6	31.8
Air Connectivity	57.4	56.2	56.8
Visa Free Travel	69.5	62.4	66.0

Comparison of 2016 Top 20 OIC Destinations with Corresponding Performance in 2015

The overall Top 20 OIC countries in the GMTI40 have remained within the top 20 ranking whilst the United Arab Emirates, Indonesia and Morocco have been able to climb up the ranking. Around 50 percent of total Muslim travelers have travelled to OIC nations. Muslim visitor arrivals continue to increase in the OIC member states. The overall key trend in visitor arrivals to the OIC member states is that Muslim travel is heavily focused on 15 destinations.

Outbound travelers from OIC destinations amount to 65 percent of total Muslim travelers. This demonstrates the strong travel business opportunities prevalent amongst the OIC nations. Muslim tourism offers a good opportunity for OIC member states to increase both intra-OIC travel as well as inbound travel from non-OIC markets.

Top 20 OIC Destinations of GMTI40

Top 20 in 2016			Top 20 in 2015		
Rank	Destination	Score	Rank	Destination	Score
1	Malaysia	81.9	1	Malaysia	83.8
2	United Arab Emirates	74.7	2	Turkey	73.8
3	Turkey	73.9	3	United Arab Emirates	72.1
4	Indonesia	70.6	4	Saudi Arabia	71.3
5	Qatar	70.5	5	Qatar	68.2
6	Saudi Arabia	70.4	6	Indonesia	67.5
7	Oman	70.3	7	Oman	66.7
9	Morocco	68.3	8	Jordan	66.4
10	Jordan	65.4	9	Morocco	64.4
11	Bahrain	65.3	10	Brunei	64.3
12	Brunei	64.6	11	Tunisia	64.0
13	Kuwait	64.1	12	Kuwait	63.9
14	Tunisia	63.7	13	Iran	63.9
15	Iran	63.6	14	Bahrain	63.6
16	Kazakhstan	63.3	15	Egypt	62.3
17	Egypt	63.1	16	Maldives	62.3
18	Maldives	61.8	17	Kazakhstan	60.5
19	Bangladesh	60.0	18	Bangladesh	60.2
22	Algeria	58.5	19	Algeria	58.5
23	Azerbaijan	57.3	20	Azerbaijan	58.2

Comparison of 2016 Top 20 Non-OIC Destinations with Corresponding Performance in 2015

50 percent of Muslim travelers visited a non-OIC destination. This highlights the vast potential that exists for non-OIC nations to cater to Muslim travel needs. Destinations such as Singapore are leading the way. Japan, Thailand, Taiwan and Hong Kong have made efforts to develop Muslim travel guides and increase understanding through education and awareness campaigns.

Singapore, Thailand and the United Kingdom have been able to hold on to their positions as the top three non-OIC countries amongst the GMTI40.

Top 20 Non OIC Destinations of GMTI40

Top 20 in 2016			Top 20 in 2015		
Rank	Destination	Score	Rank	Destination	Score
1	Singapore	68.4	1	Singapore	65.2
2	Thailand	59.5	2	Thailand	59.4
3	United Kingdom	59.0	3	United Kingdom	55.0
4	South Africa	53.1	4	South Africa	51.1
5	Hong Kong	53.0	5	France	48.2
6	France	51.6	6	Belgium	47.5
7	Taiwan	50.1	7	Hong Kong	47.5
9	Japan	49.1	8	United States	47.3
10	Sri Lanka	49.0	9	Spain	46.5
11	United States	48.9	10	Taiwan	46.2
12	Spain	48.8	11	Japan	45.3
13	India	48.7	12	Switzerland	45.2
14	Belgium	48.1	13	Australia	45.1
15	Germany	46.8	14	India	44.2
16	Australia	46.6	15	Sri Lanka	44.0
17	Philippines	45.7	16	Bosnia and Herzegovina	44.0
18	Switzerland	45.6	17	Russian Federation	43.8
19	Bosnia and Herzegovina	45.3	18	Germany	43.5
22	Russian Federation	45.1	19	New Zealand	42.4
23	China	44.5	20	Netherlands	42.1

Muslim Visitor Arrivals Analysis

It is estimated that International Muslim visitor arrivals in 2015 was 117 million. Asia and Europe are the two leading regions attracting Muslim visitors.

Region	No of Visitors	Visitor %
Asia	66.7	56.7%
Europe	35.0	29.7%
Africa	10.4	8.8%
America	5.0	4.3%
Oceania	0.6	0.5%
Total	117.7	100%

The table below provides the percentage of Muslim travel by region. It is observed that travel within the region is the highest for all continents except for Oceania where the highest number of visitors is to Asia, the region within closest proximity.

		Originating Destination				
		Africa	America	Asia	Europe	Oceania
Arrival Destination	Africa	54%	3%	3%	5%	2%
	America	2%	62%	2%	5%	14%
	Asia	36%	8%	77%	16%	42%
	Europe	8%	26%	17%	73%	25%
	Oceania	0%	1%	1%	1%	17%
	Total	100%	100%	100%	100%	100%



GMTI 2016 Criteria Overview

Family-Friendly Destination

More than 50 percent of Muslim tourists travel with their families - a much higher percentage compared to other travel segments. As such, GMTI takes into account the level of family-friendly activities the destination offers.

Two main metrics are taken into account to calculate the score for these criteria:

- 1 The overall visitor arrivals at the destination in 2015
- 2 The availability of activities such as shopping, sightseeing, architecture, arts and culture, nature and wildlife, beaches and more

Muslim Traveler and General Safety

A safe and secure environment is key to attracting any tourist to a destination. The last 12 months has seen a heightened level of security concerns among travelers. In addition to general safety concerns, Muslim travelers are also concerned about the rising Islamophobia in a number of destinations.

The safe travel environment score is calculated from the perspective of a Muslim traveler. Two primary factors are considered for calculating the scores:

- 1 Travel alerts issued on a destination by Australia, Canada, UK and US
- 2 Muslim traveler safety

Travel alerts issued about tourist destinations were used as the primary indicator to ascertain the general security situation of a particular country. These travel alerts not only cover the general safety and security situation of a country, but also other factors such as natural disasters and health epidemics.

For the Muslim travel safety metrics, extensive online research is done to check for incidents reported against Muslims. Many Muslim female tourists wear traditional Islamic clothing, which can include the Hijab. In some cases the face covering, Niqab, is also worn. Any resentment prevalent at the destination for such clothing is also taken into account.

Muslim Visitor Arrivals

One of the biggest indicators of the popularity of a destination is the volume of Muslim visitor arrivals. The Muslim visitor arrival figures have been extracted by applying CrescentRating's proprietary Muslim arrivals calculation model to the overall visitor arrivals as reported by United Nations World Tourism Organization (UNWTO).

This study revealed that in 2015 the estimated total Muslim visitor arrivals was 117 million representing 10 percent of the entire travel economy. The travel and tourism data provided by UNWTO is the primary source of data.

The score for the Muslim visitor arrival criteria is based on the:

1. Total Muslim visitor arrivals
2. Percentage of Muslim visitors as a percentage of total visitors

Dining Options and Halal Assurance

For Muslim tourists, Halal food is their primary concern when traveling. Given the complexity of the food industry, an independent Halal assurance of a food outlet puts Muslims at ease when choosing where to eat.

The dining options and Halal assurance score for each destination is based on:

- 1 The availability of Halal food in the main cities of the destination
- 2 The Halal certification eco-system in the destination

Access to Prayer Places

Performing prayers (Salah) five times a day is one of the five pillars of Islam. Salah is preceded by ablution, a certain way of cleaning oneself before prayers. The prayer could be performed at any clean location, but most Muslims travelers would prefer a mosque or a designated place for prayers. Hence, ease of access to prayer facilities in the tourist destination will make Muslim travelers more comfortable.

Non-OIC destinations have been actively setting up prayer rooms in places like railway stations (Taiwan), shopping malls (Japan), attractions (Singapore) and at airports. An increasing number of them are also providing facilities for Wudhu.

The scoring methodology for access to prayer places is based on the general availability of prayer facilities in the destination and in particular their availability in the main tourist cities of the destinations.

Airport Facilities

Airports provide various facilities and services that cater to the diverse needs of travelers from around the globe and witness large number of passengers throughout the year. To cater to the growing number of Muslim travelers passing through, it is crucial that airports are able to cater to their specific needs. The three most important facilities that are needed to cater to the Muslim traveler is the availability of prayer rooms, proper ablution facilities and Halal food/restaurants in both public and transit areas.

The scoring for this criterion is based on the following:

- 1 Availability of proper ablution facilities in public and transit areas
- 2 Availability of prayer rooms in public and transit areas
- 3 Availability of Halal food / restaurants in both public and transit area

Depending on the size of the destination, the above criteria is scored for the main international airports at the destination.

Accommodation Options

Providing accommodation options which cater to Muslim travelers is important. Having access to Halal food, prayer direction markings and water-friendly washrooms are some of the most important services that Muslims will look for to make their stay comfortable at hotels or other accommodation.

Since a huge proportion of Muslim tourists travel with children and parents, having family-friendly accommodation such as an apartment hotel will increase the attractiveness of a destination.

The accommodation score is based on the following:

- 1 Number of hotels, which are promoted as Muslim-friendly
- 2 The volume of apartment hotel type accommodation available for family travelers

Muslim Traveler Needs Awareness and Outreach

This criteria looks at awareness of the Muslim travel market and its needs at the destination as well as specific outreach by the destination to this segment. This includes marketing campaigns by tourism bodies directly targeting this sector.

This criteria is scored using the following metrics:

- 1 The percentage of Muslim population in the destination
- 2 Conferences, workshops, seminars and other educational activities at the destination related to Halal food, Halal travel, Muslim consumers, etc
- 3 Muslim visitor guides and information published by the destination
- 4 Destination marketing targeted at the Muslim travelers

Ease of Communication

Most Muslim travelers speak Arabic, Bahasa (Malaysia/Indonesia), English, French, Persian and Turkish. Therefore this criteria evaluates the proficiency in these languages for each destination. It is calculated based on the languages used by travelers from the top 30 Muslim travel outbound markets.

Air Connectivity

Air connectivity is an important consideration in planning a travel itinerary. This is a new criteria included in the GMTI 2016. The scores are based on the level of air connectivity to the destination from the top 30 Muslim travel outbound markets.

Visa Requirements

Visa requirements play a huge part in selecting a destination for leisure travel. As such, this criteria analyses the visa requirements of each destination for the top 30 Muslim travel outbound markets.



GMTI Scores Table

Destination	GMTI		Family-friendly holiday and safe travel destination			Muslim-friendly services and facilities at the destination				Halal awareness and destination marketing			
	2016 Rank	2016 GMTI Score	Family-friendly Destination	Muslim Traveler and General Safety	Muslim Visitor Arrivals	Dining Options & Halal Assurance	Access to Prayer Spaces	Airport Facilities	Accommodation Options	Ease of Communication	Muslim Travel Needs Awareness and Reachout	Air Connectivity	Visa requirements
Singapore	8	68.4	53.6	100.0	44.0	80.0	70.0	66.7	42.6	78.2	51.3	58.1	74.5
Thailand	20	59.5	60.9	68.0	31.2	45.0	50.0	93.3	42.6	49.9	63.8	81.8	81.7
United Kingdom	21	59.0	73.1	80.0	17.9	60.0	70.0	50.8	31.4	82.6	20.0	71.1	58.4
South Africa	30	53.1	60.5	78.0	8.7	55.0	60.0	65.6	21.9	56.1	27.5	43.7	63.1
Hong Kong	31	53.0	55.8	100.0	18.7	50.0	30.0	53.3	29.1	52.5	27.5	57.5	71.2
France	32	51.6	87.2	65.0	41.4	38.5	45.0	35.3	27.9	45.2	13.8	71.7	58.9
Taiwan	33	50.1	51.9	100.0	8.9	40.0	15.0	66.7	43.6	36.0	56.3	31.7	78.4
Japan	34	49.1	61.3	100.0	6.9	40.0	20.0	43.3	38.2	28.3	62.5	46.1	62.2
Sri Lanka	35	49.0	54.0	63.0	18.6	50.5	62.0	35.0	51.4	40.0	26.3	66.7	61.7
United States	36	48.9	86.5	75.0	26.4	35.0	30.0	31.7	25.7	80.9	13.8	40.3	52.0
Spain	37	48.8	76.7	85.0	35.2	35.0	25.0	27.7	39.0	36.3	21.3	53.6	58.9
India	38	48.7	58.7	59.0	36.6	43.0	50.0	46.7	30.0	43.2	23.8	77.3	51.4
Belgium	39	48.1	55.8	70.0	9.2	55.0	50.0	56.7	20.0	54.1	13.8	40.9	58.9
Germany	43	46.8	61.6	80.0	18.6	35.0	35.0	31.0	30.9	51.8	26.3	67.5	58.9
Australia	44	46.6	61.8	75.0	9.7	41.5	29.0	48.0	32.2	76.4	40.0	25.8	46.0
Philippines	46	45.7	46.2	70.0	6.9	42.0	55.0	45.0	21.1	34.0	35.0	50.4	86.0
Switzerland	47	45.6	43.0	85.0	10.7	50.0	50.0	23.3	25.8	52.0	20.0	52.6	58.9
Bosnia and Herzegovina	48	45.3	43.0	76.0	4.6	55.0	50.0	42.5	30.3	19.0	21.3	47.2	72.8
Russian Federation	49	45.1	57.2	70.0	60.0	30.0	25.0	33.3	20.3	37.7	32.5	53.8	50.4
China	50	44.5	75.4	75.0	29.7	31.0	25.0	22.0	26.5	21.0	15.0	85.8	43.0
Ireland	51	44.3	52.7	95.0	4.0	25.0	45.0	38.3	20.8	78.4	10.0	28.3	56.1
Canada	52	44.1	56.9	90.0	6.4	37.0	27.0	34.0	20.1	67.6	15.0	37.3	52.9
South Korea	54	43.8	57.3	100.0	8.5	32.0	15.0	26.0	25.3	16.0	37.5	48.1	75.0
Tanzania	55	43.7	42.1	74.0	8.6	60.0	60.0	20.0	28.6	34.0	10.0	30.4	69.8
Netherlands	56	43.6	53.7	75.0	9.8	44.0	45.0	22.8	19.5	51.6	13.8	57.5	58.9
Italy	60	43.2	69.2	70.0	29.9	28.0	15.0	26.3	38.3	34.3	21.3	66.2	58.9
New Zealand	63	42.4	46.8	97.0	3.9	36.5	20.0	31.1	19.2	76.3	20.0	14.0	68.4
Georgia	65	40.8	49.9	90.0	30.2	30.0	21.0	15.0	20.1	24.5	13.8	28.9	85.9
Bulgaria	66	40.7	50.0	80.0	26.9	23.5	20.0	38.3	26.0	24.5	13.8	59.6	58.9
Austria	69	40.3	49.3	85.0	16.3	37.0	25.0	15.0	32.0	28.6	13.8	47.0	58.9
Fiji	70	40.2	44.1	100.0	2.7	30.0	25.0	46.7	13.6	32.0	13.8	0.0	73.9
Cyprus	71	40.1	40.3	100.0	7.8	30.0	40.0	15.0	20.3	38.0	10.0	37.7	58.9
Denmark	72	39.8	54.9	80.0	6.9	30.0	20.0	19.4	23.0	71.2	10.0	46.4	58.9
Mauritius	73	39.3	43.1	100.0	5.6	32.5	25.0	10.0	21.2	40.5	13.8	18.3	84.8
Greece	74	38.8	57.7	80.0	27.7	20.0	25.0	12.0	22.2	39.7	10.0	42.7	58.9
Sweden	75	38.5	53.8	85.0	6.4	27.0	25.0	19.6	22.4	35.2	10.0	44.5	58.9
Norway	77	38.4	49.6	90.0	6.5	25.0	30.0	15.0	24.8	48.0	10.0	31.3	58.3
Kenya	75	38.5	39.9	58.0	4.7	40.0	40.0	56.7	20.3	32.0	13.8	21.6	63.3
Croatia	78	38.1	47.0	90.0	8.2	25.0	20.0	16.7	38.6	16.0	33.8	38.2	58.9
Portugal	82	37.6	52.6	95.0	6.3	20.0	20.0	15.0	28.0	35.0	10.0	34.7	58.9
Vietnam	83	35.7	51.8	90.0	6.7	20.0	15.0	16.7	20.6	28.1	10.0	33.0	60.6
Argentina	86	35.1	60.6	90.0	0.2	20.0	20.0	12.0	21.5	18.4	10.0	11.4	65.0
Luxembourg	89	34.7	39.9	90.0	7.2	25.0	20.0	10.0	22.5	42.0	10.0	22.0	58.3
Uganda	91	34.4	41.0	70.0	21.3	25.0	27.0	10.0	13.2	29.0	13.8	35.0	72.9
Romania	92	34.4	52.8	80.0	10.3	20.0	15.0	23.7	19.5	24.0	0.0	28.9	59.3
Lithuania	93	34.4	47.7	90.0	2.8	20.0	15.0	26.1	23.0	24.0	0.0	24.1	55.8
Poland	94	34.1	50.4	75.0	6.4	24.5	15.0	24.2	23.0	24.6	0.0	35.3	58.9

GMTI Scores Table

Destination	GMTI		Family-friendly holiday and safe travel destination			Muslim-friendly services and facilities at the destination				Halal awareness and destination marketing			
	2016 Rank	2016 GMTI Score	Family-friendly Destination	Muslim Traveler and General Safety	Muslim Visitor Arrivals	Dining Options & Halal Assurance	Access to Prayer Spaces	Airport Facilities	Accommodation Options	Ease of Communication	Muslim Travel Needs Awareness and Reachout	Air Connectivity	Visa requirements
Poland	94	34.1	50.4	75.0	6.4	24.5	15.0	24.2	23.0	24.6	0.0	35.3	58.9
Cambodia	95	33.9	39.7	80.0	4.9	20.0	24.0	32.9	15.3	26.0	13.8	9.2	71.6
Brazil	96	33.8	56.2	73.0	2.5	23.5	15.0	19.7	23.0	18.0	10.0	28.8	63.6
Finland	97	33.7	50.4	85.0	5.9	20.0	15.0	15.0	16.3	25.0	10.0	25.4	58.9
Slovenia	98	33.6	42.4	90.0	4.8	20.0	15.0	15.0	22.7	24.0	10.0	30.5	58.9
Hungary	99	32.7	48.9	80.0	9.3	15.0	15.0	10.0	21.4	32.1	0.0	39.4	60.8
Chile	100	32.7	46.0	90.0	1.2	20.0	15.0	15.0	23.0	17.6	10.0	4.8	67.9
Czech Republic	101	32.6	42.1	75.0	7.5	20.0	15.0	24.2	24.0	24.0	0.0	40.4	58.9
Aruba	102	32.0	39.9	100.0	4.0	10.0	15.0	28.3	24.6	16.4	0.0	1.0	53.7
Slovak Republic	103	31.8	41.2	85.0	6.4	15.0	15.0	16.7	17.7	16.0	0.0	43.0	58.9
Puerto Rico	104	31.7	46.9	90.0	0.6	20.0	20.0	10.0	15.8	32.2	0.0	3.7	51.2
Burkina Faso	105	31.7	30.1	60.0	20.7	25.0	55.0	20.0	16.0	8.0	15.0	10.9	48.0
Malta	106	31.6	47.6	75.0	5.4	25.0	15.0	10.0	16.2	24.0	0.0	29.0	58.3
Laos	107	30.9	44.6	93.0	3.4	10.5	15.0	15.0	16.4	18.0	0.0	5.0	68.1
Jamaica	108	30.9	43.4	68.0	2.0	20.0	15.0	16.7	17.7	65.0	0.0	4.0	68.7
Estonia	109	30.8	42.5	85.0	3.3	14.0	15.0	16.7	23.0	24.0	0.0	20.1	55.1
Swaziland	110	30.8	43.1	76.0	7.3	15.0	20.0	20.0	13.0	24.0	13.8	0.0	67.8
Ukraine	111	30.8	37.3	62.0	11.2	30.0	15.0	14.0	14.5	16.2	10.0	40.9	65.7
Bahamas	112	30.7	46.4	76.0	1.2	15.0	15.0	15.0	15.7	48.0	0.0	1.2	74.4
Panama	113	30.6	45.5	82.0	1.2	20.0	15.0	10.0	18.3	13.0	10.0	4.8	70.8
Latvia	114	30.5	43.4	75.0	3.7	20.0	15.0	10.0	23.0	24.0	0.0	35.4	55.8
Mexico	116	30.4	54.9	72.0	5.9	20.0	15.0	10.0	13.2	9.8	10.0	17.0	55.4
Ecuador	117	30.0	47.5	74.0	1.5	11.5	15.0	10.0	23.0	25.4	0.0	4.8	95.2
Peru	118	29.4	50.1	70.0	1.3	14.0	15.0	16.7	25.0	9.6	12.5	4.8	67.9
Cuba	119	29.4	45.8	95.0	5.5	6.5	15.0	10.0	16.0	9.6	0.0	13.0	46.5
Zimbabwe	120	29.3	39.1	68.0	5.6	20.0	20.0	10.0	13.0	48.0	10.0	0.0	63.6
Andorra	121	29.3	30.7	100.0	3.7	10.0	20.0	0.0	14.7	33.2	10.0	0.0	58.9
Guam	122	28.8	41.1	90.0	0.7	15.0	15.0	10.0	13.3	16.0	0.0	0.0	56.6
Dominican Republic	123	28.0	44.1	68.0	3.4	15.0	15.0	13.3	16.0	17.4	0.0	15.5	65.8
Uruguay	124	27.5	32.8	90.0	1.0	9.0	15.0	10.0	23.0	16.0	0.0	0.0	63.6
Colombia	125	27.1	50.0	62.0	1.7	11.0	15.0	15.0	23.0	13.8	0.0	0.0	73.7
Guatemala	126	27.0	38.9	78.0	0.8	13.0	15.0	10.0	17.5	9.2	0.0	0.0	72.7
Nicaragua	127	26.8	35.7	68.0	3.3	15.0	15.0	10.0	14.3	25.8	0.0	0.0	83.4
Bolivia	128	26.8	48.5	68.0	7.4	10.5	15.0	6.7	13.8	9.0	0.0	0.0	73.6
Costa Rica	129	26.5	44.6	78.0	1.2	6.5	15.0	0.0	23.0	25.2	0.0	2.9	59.7
El Salvador	130	25.7	41.1	70.0	0.5	10.0	15.0	10.0	16.4	9.6	0.0	0.0	72.9



Footnotes and Data Sources

Booking.com

<http://www.booking.com/>

Bureau of Consular Affairs – United States

<http://travel.state.gov/content/passports/english/alertswarnings.html>

CrescentRating

<https://www.crescentrating.com/travel-index-ranking.html>

Department of Foreign Affairs and Trade - Australia

<http://www.smartraveller.gov.au/>

Government of Canada

<http://travel.gc.ca/travelling/advisories>

Government of the United Kingdom

<https://www.gov.uk/foreign-travel-advice>

HalalTrip

<http://www.halaltrip.com/>

Index Mundi

<http://www.indexmundi.com/factbook/countries>

Pew Research Centre Forum on Religious and Public Life (2014)

The Future of the Global Muslim Population; Washington, DC USA, Pew Research

United Nations World Tourism Organization - UNWTO

<http://www2.unwto.org/>



Corporate Overview



MasterCard

About MasterCard

MasterCard is a technology company in the global payments industry. We are leading the way toward a world beyond cash with the power to expand connectivity, opportunity and prosperity for individuals, businesses and communities.

We operate the world's fastest payments processing network, connecting consumers, financial institutions, merchants, governments and businesses in more than 210 countries and territories. Our products and solutions make everyday commerce activities - such as shopping, traveling, running a business, and managing finances - easier, more secure and more efficient for everyone. Through our payment solutions, we deliver value and connect close to two billion cardholders with tens of millions of merchants around the world.

As we move toward a world beyond cash, we are helping to secure a better, more inclusive future for everyone. We are committed to continuing to use our technology and expertise to deliver better ways to pay, creating a more connected world.



About CrescentRating

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.

Formed in 2008, CrescentRating services are now used by every tier of the tourism industry globally, from government bodies and tourism agencies to hospitality service providers, to inform how they can meet and serve the needs of the Muslim traveler. Its unique rating service, which combines detailed analysis, assessment and benchmarking, is now established as the premier Halal friendly standard for the industry.

The primary aim of CrescentRating is to enable Muslim travelers to explore any part of the world with the satisfaction that their needs and requirements are being met. CrescentRating's services now include rating & accreditation, research & consultancy, workshops & training, ranking & indices, event support/partnerships and content provision. HalalTrip is a sister brand of CrescentRating.



halaltrip

About HalalTrip

HalalTrip's vision is to be the trusted global online platform, catering for Muslim travelers to make inspired and educated choices. It is the most comprehensive and innovative platform with its next generation mobile app. It makes destination discovery and trip planning fun and more intuitive for those looking for a Halal-friendly travel experience.



muslim travel
WAREHOUSE

About Muslim Travel Warehouse

It the world's 1st global B2B travel aggregator offering Halal-friendly tourism packages, excursions and activities. It provides suppliers and travel agencies with a single platform for the growing Halal travel market. The travel agents will have access to comprehensive search and booking capabilities on a full portfolio of Muslim-friendly products.

Access GMTI Results on an Interactive Platform



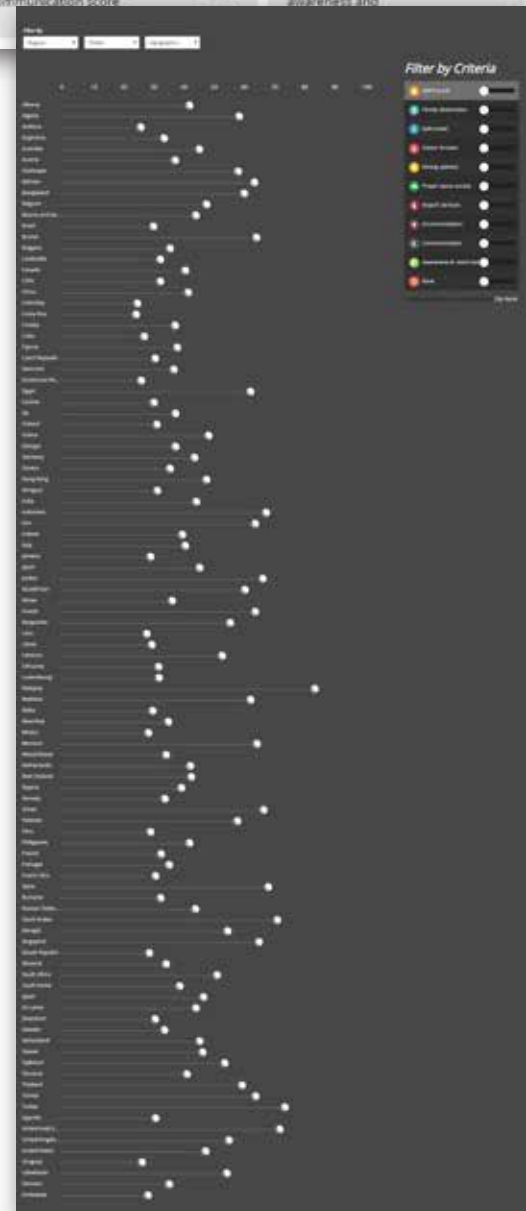
The GMTI results can be accessed on an interactive online platform that provides a comprehensive search and analysis for each destination together with the scores and ranks for various criteria.

The platform offers a filter by criteria that shows users the rankings of destinations based on the different criteria that were used to determine their ranks. It is also possible to filter destinations based on region, trade blocs and geography type in order to obtain rankings that are more specific.

Additionally, the platform contains a collection of images, videos, infographics, blog articles and a media section with useful information regarding the Global Muslim Travel Index 2016.

The interactive online platform can be accessed using the URL:

<http://www.crescentrating.com/global-muslim-travel-index/2016.html>







Notes

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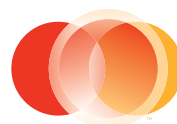
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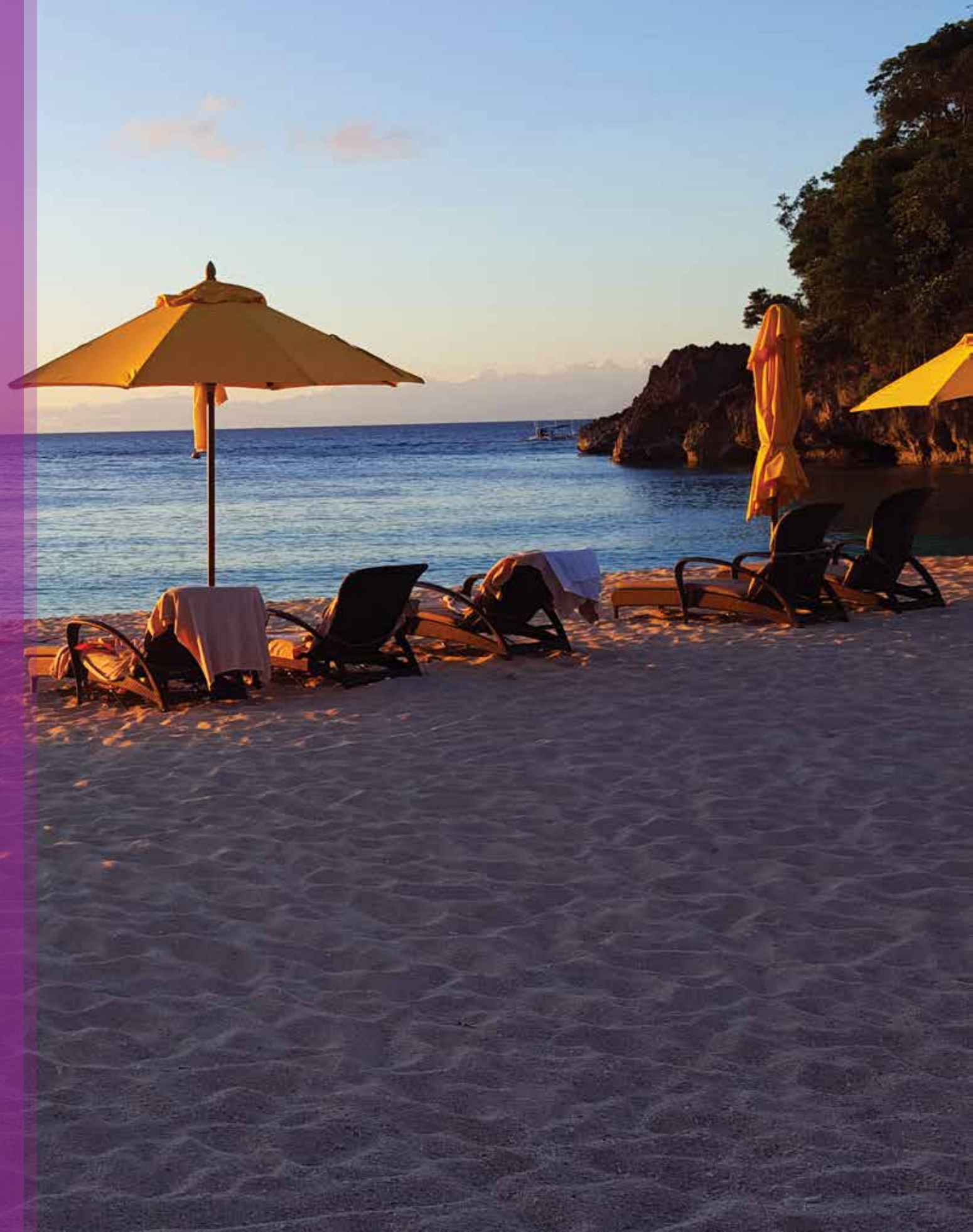


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