

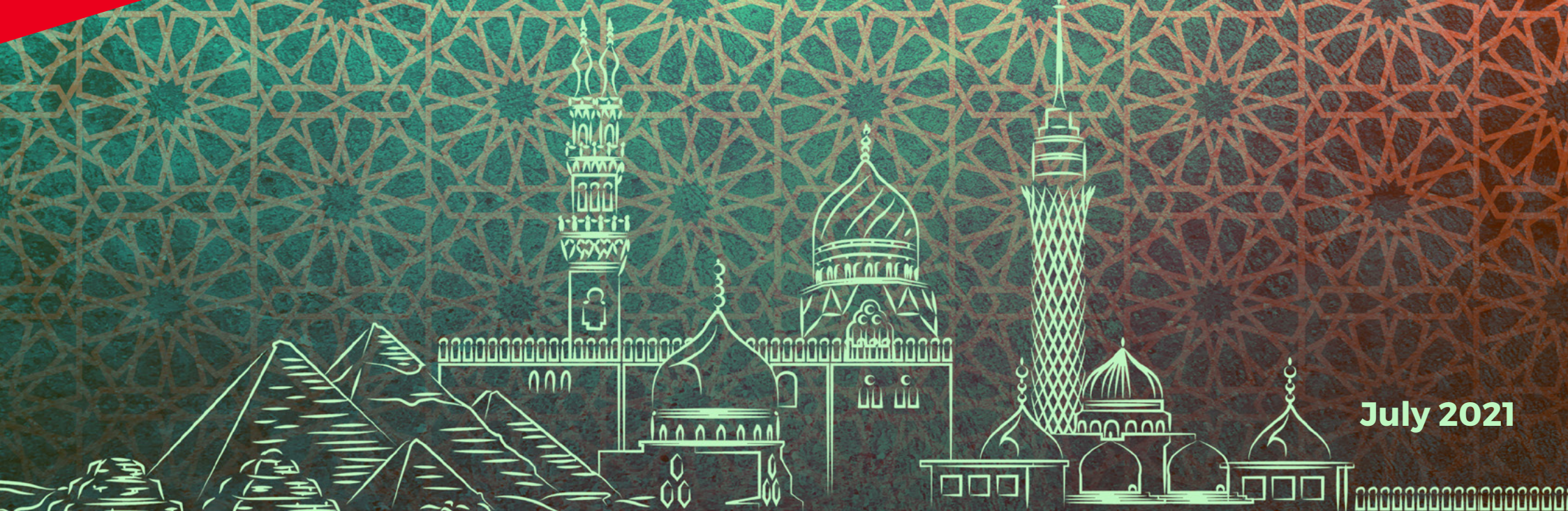
Mastercard-CrescentRating

GLOBAL MUSLIM TRAVEL INDEX 2021

#GMTI2021



crescent
rating



July 2021

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FOREWORD





We welcome you back to the 6th edition of the Mastercard-CrescentRating Global Muslim Travel Index (GMTI), 2021. The pandemic has inflicted a heavy toll on the travel industry. However, travel is a resilient segment, and we are all looking forward to the gradual re-opening of international borders for travel.

2020 began with destinations caught off guard against COVID-19. Although we are still facing many uncertainties in the battle to overcome the pandemic, 2021 started with positive news of the successful development and approval of vaccines by various destinations. As new COVID-19 variants threaten the already fragile efforts to restart tourism, a global effort to vaccinate the population remains key to accelerating the recovery.

COVID-19 will become a part of everyday life. In the short to medium term, vaccination will be a requirement especially for travel. This will mean tourism will be more personalized with smaller numbers and re-designed visitor experiences.

The pandemic has had a colossal impact on the travel sector. Muslim arrivals dropped to 42 million in 2020 from an all-time high of an estimated 160 million in 2019. As we start this recovery journey, we project that the Muslim travel market will return to the 2019 levels by 2023.

We believe the GMTI 2021 will help the destinations prepare for the long road ahead to get back to the growth path. This year's report ranks 140 destinations on how ready they are to attract the Muslim travel market in the COVID-19 environment. As the health environment is crucial for any travel re-opening, we have also correlated GMTI rankings with the Travel Readiness Indicators (TRI).

As we have done in the last few years of the Index, we continue to fine-tune the GMTI criteria based on the "CrescentRating ACES model" to reflect the current developments better.

As for the GMTI 2021 results, Malaysia remains the top-ranked destination, with Turkey a close number 2. Among the non-OIC destinations, there are some movements in the top 10, while Singapore is continuing to hold the top spot.

We also looked at the evolving concept of travel bubbles and corridors. Finally, we investigated the impact of the pandemic on the faith-based services needs of Muslim travelers as well as their online behavior. These findings are included as supplements in this year's report.

We trust GMTI 2021 will help all stakeholders identify gaps and opportunities in catering to the Muslim market and better prepare destinations in attracting this segment as international travel gradually opens.

Fazal Bahardeen

Founder & CEO
CrescentRating
HalalTrip





Safdar Khan

Division President,
Southeast Asia Emerging Markets,
Mastercard



When can we fly again? It’s one of the questions on everyone’s mind.

More than a year into the global health crisis, the travel, tourism, and hospitality industries continue to bear the brunt of the pandemic. The road to recovery remains long, uneven, and complicated. Mastercard research shows that while there’s been remarkable recovery in domestic air travel, with one-fifth of countries studied showing a return to at least 90% of pre-pandemic levels for domestic flight bookings, international air travel is unlikely to resume to pre-pandemic levels soon.

The past year has only reinforced the role travel plays in our mental health, personal growth, and the desire to stay connected with friends, families, and the world. While uncertainty remains high, so are the pent-up savings and desire to venture farther from home. Travel will return but it won’t be the same. Societies and all industries will have to adjust and adapt to a world in which where the ways people interact, shop, work, and live are profoundly different.

A key trend that will be here to stay is “contactless travel”. The pandemic has accelerated the digital transformation of the airline industry. Developing a digital-first, low-touch, contactless customer experience will be a pivotal driver in the travel industry’s recovery roadmap. According to SITA’s Air Transport IT Insights report, 64% of airports

globally aim to implement self-boarding gates using biometric technologies for identity checks, a figure that is three times as many as in 2020.

At Mastercard, we believe that digital payments will be instrumental in helping the travel industry recover. Even prior to COVID-19, contactless payments were already on the rise. According to the Mastercard New Payments Index, 94% of consumers in Asia Pacific will consider using at least one new payment method, such as QR codes, digital or mobile wallets, cryptocurrencies, biometrics, and others in the coming year. Businesses in the travel sector must be prepared for the rising consumer demand around convenient, secure, and touch-free quick payment options.

Asia Pacific is renowned for its popularity with Muslim travelers. As the world begins to open again, understanding how best to meet the needs of this important demographic will be crucial to ensuring that the travel sector’s recovery is both sustainable and inclusive.

Mastercard is committed to supporting the recovery of global travel across all travelers’ profiles. That is why we continually collaborate with our partners - HalalTrip and CrescentRating - to develop the insights for businesses and governments as they evolve, scale, and accelerate digital transformation in the travel industry.

MASTERCARD-CRESCENTRATING REPORTS

As we enter the next phase of travel reopening, understanding the trends, behavior, and recovery scenarios become crucial to accelerating the travel industry's recovery. Since 2015, Mastercard and CrescentRating have partnered to bring in-depth research analysis to help all stakeholders make data-driven decisions. The GMTI 2021 is the 20th report released through this partnership.



Download the Reports here

Global Muslim Travel Index (GMTI)

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

Consumers

- Muslim Women In Travel 2019
- Digital Muslim Travel 2018
- Muslim Millennial Travel 2017
- Muslim Business Traveler 2016

Economies

- Travel Readiness 2020
- Halal Travel Frontier 2020
- Halal Travel Frontier 2019
- Halal Travel Frontier 2018
- Ramadan Travel 2016



Countries

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

Industries

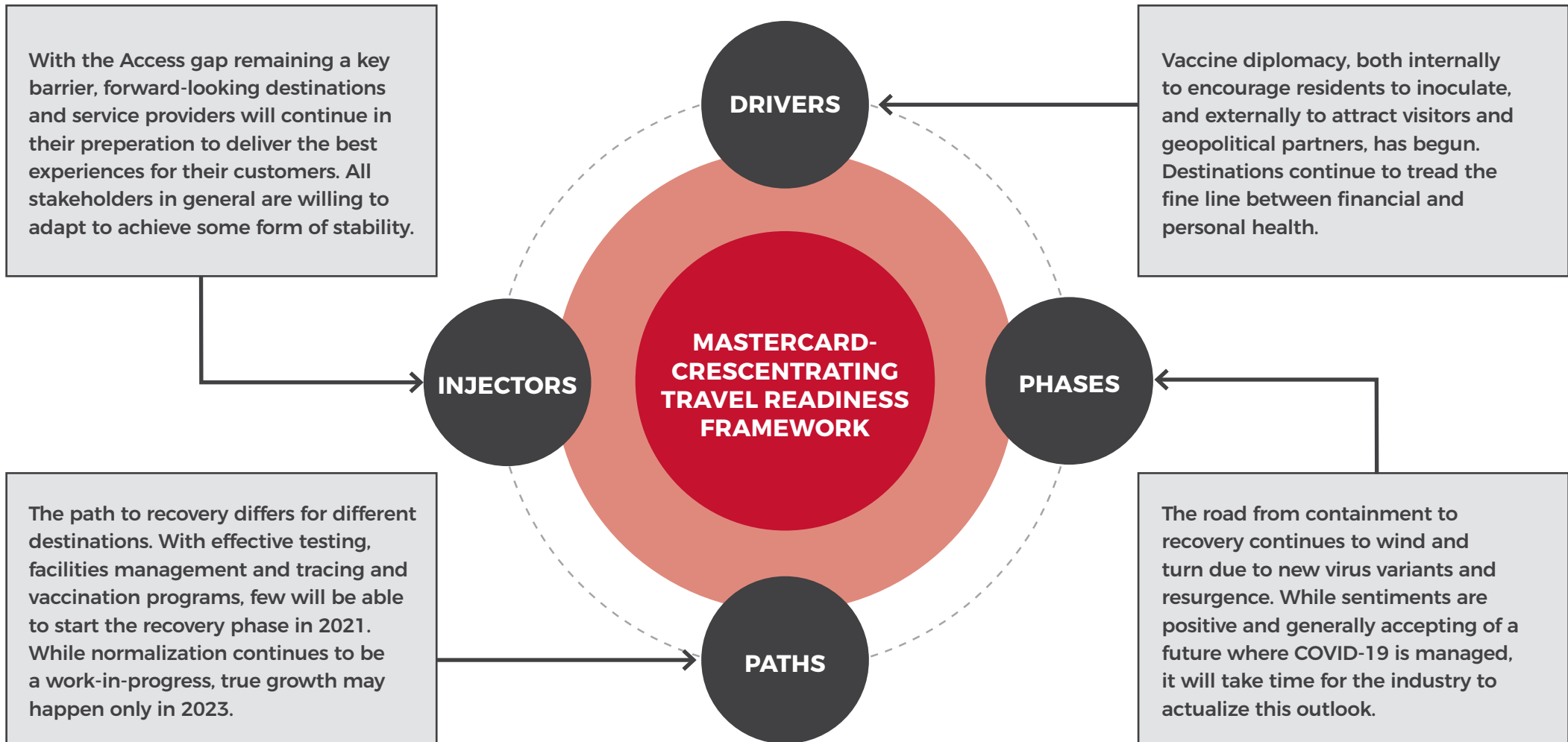
- Halal Food Lifestyle - Singapore 2021
- Muslim Travel Shopping Index 2015

MUSLIM TRAVEL MARKET



ROAD TO RECOVERY, WITH SOME TURBULENCE

In 2020, Mastercard and CrescentRating developed the Travel Readiness Framework which identified four key factors for the travel industry to effectively understand, plan and grow post COVID-19. As our understanding of COVID-19 and its impact on destinations have grown, this framework is updated based on these insights.



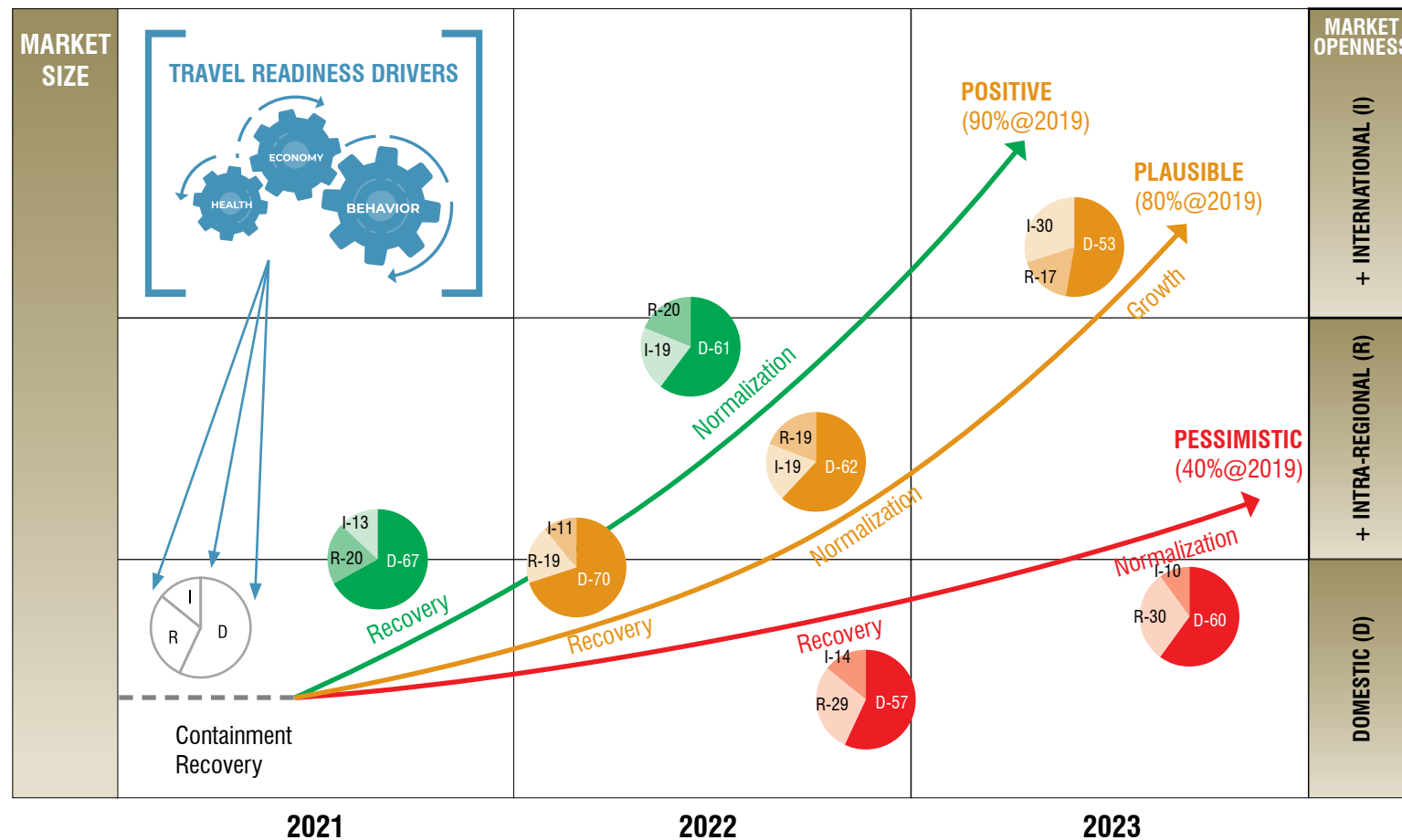
* For more information on the Travel Readiness Framework, refer to Mastercard-CrescentRating Travel Readiness Report 2020

RECOVERY IN PROGRESS

Mastercard-CrescentRating Travel Readiness Report released in July 2020 suggested three COVID-19 growth recovery paths facing ASEAN till 2022: positive, plausible, and pessimistic. In addition, market projections on the size of the ASEAN travel market were also indicated in each recovery phase within the respective paths. The positive path was recovering to 94% of the 2019 levels by the middle of 2021. The plausible path was recovering to 71% of 2019 levels by the middle of 2022. The pessimistic path was only recovering to 31% by the end of 2022.

Given that the pandemic has dragged along, these projections have been updated in this report. The plausible path now is the positive path. However, the pessimistic path remains the same. The new plausible path is to recover to 80% of 2019 levels by the middle of 2023.

Although this simulation is based on the ASEAN travel numbers, most other regions could also follow a similar trajectory.



PRESENT COVID-19 GROWTH RECOVERY PATH

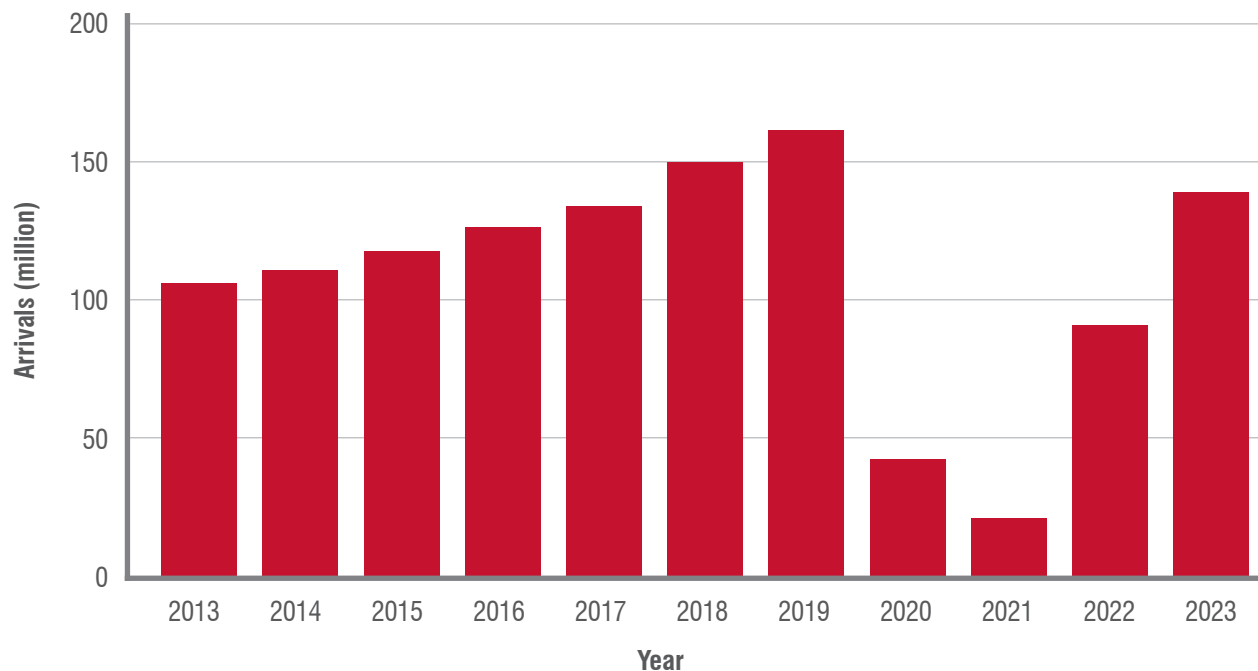


MUSLIM TRAVEL MARKET GROWTH PROJECTIONS

International Muslim traveler arrivals grew from an estimated 108 million in 2013 to 160 million in 2019. This is a CAGR of 7.5% during that period.

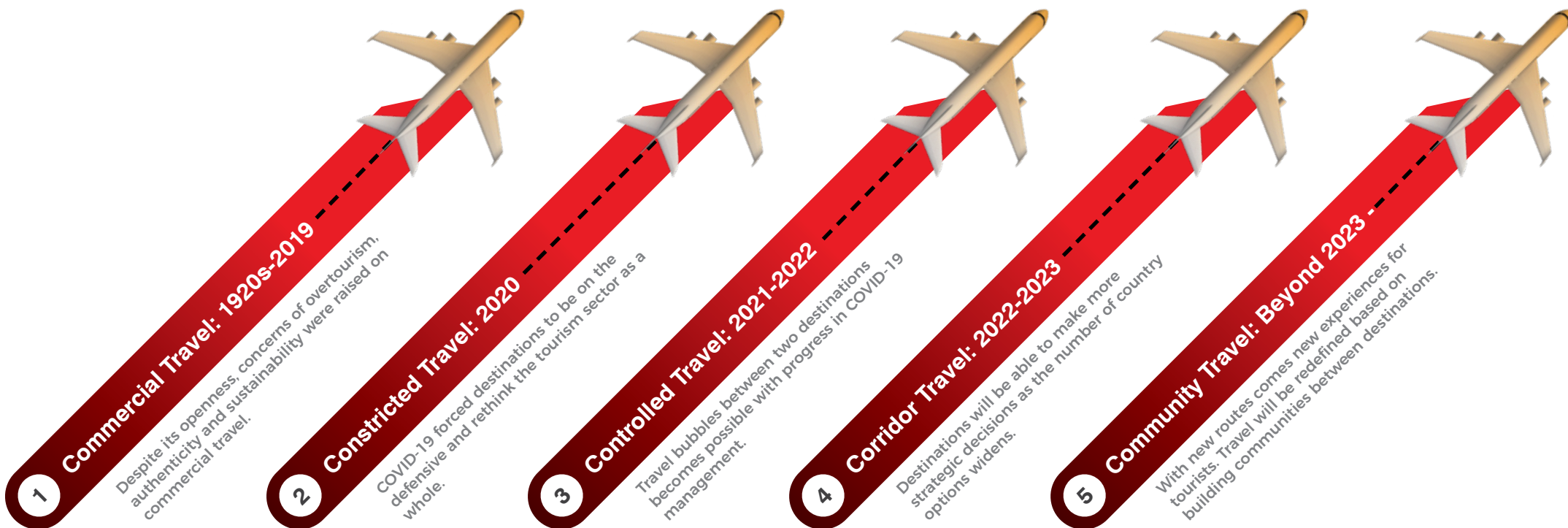
As the pandemic had a colossal impact on the travel sector, the Muslim arrivals dropped to 42 million in 2020. More than 90% of these trips were performed in the first quarter of 2020 before most destinations closed their borders.

As international borders are expected to open up gradually in the latter part of 2021, it is estimated that Muslim Visitor arrivals will reach 26 million in 2021. It is also projected that the Muslim travel market will recover up to 80% of the 2019 levels in 2023.



EVOLVING TRAVEL WITH COVID: 5C TRAVEL PHASES FROM COMMERCIAL TO COMMUNITY

For close to a century, the travel industry model has been relatively unchanged. However, accelerated by COVID-19, travel will evolve from being primarily commercial-driven to one which focuses on building communities. The speed in which destinations progress through each phase will differ based their ability to manage COVID-19 as well as continuing investments in innovating their tourism economies.



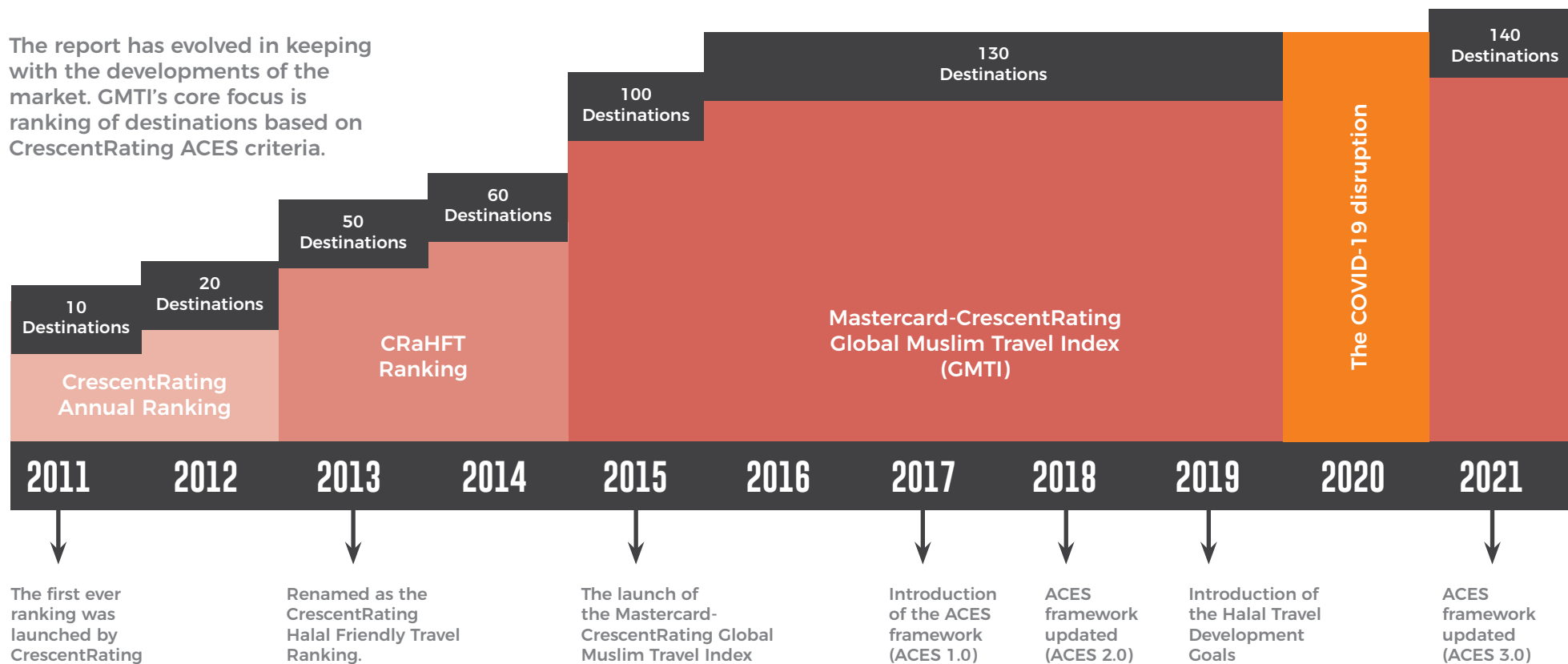
GMTI 2021 OVERVIEW



THE MAKING OF THE MASTERCARD-CRESCENTRATING GLOBAL MUSLIM TRAVEL INDEX (GMTI)

CrescentRating started benchmarking destinations for their Muslim-freindliness in 2011. The report initially called “CrescentRating Annual Ranking” transformed into the annual Mastercard-CrescentRating Global Muslim Travel Index (GMTI) in 2015. The COVID-19 pandemic disrupted the release of the GMTI 2020 report. It is back this year with the 6th edition - GMTI 2021. It brings the most comprehensive research and insights to help stakeholders better cater to Muslim travelers.

The report has evolved in keeping with the developments of the market. GMTI’s core focus is ranking of destinations based on CrescentRating ACES criteria.



CRESCENTRATING ACES MODEL 3.0

The GMTI criteria are based on “CrescentRating ACES model” which was formalized in the GMTI 2017 report.

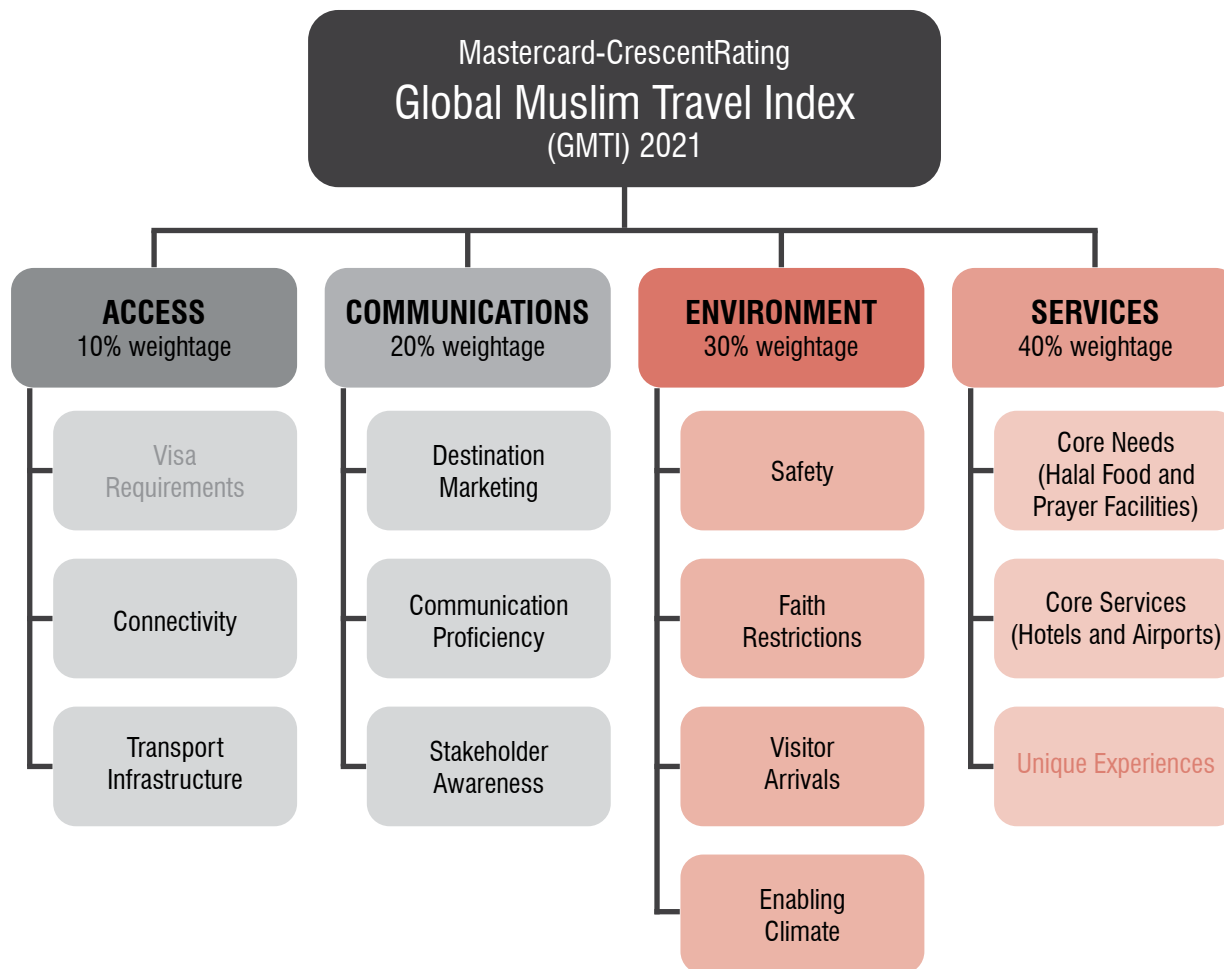
The ACES model encompasses four key factors to enable destinations to attract more Muslim travelers:

- Ease of **Access** to the destination
- Internal and External **Communication** by the destination
- **Environment** at the destination
- **Services** provided by the destination

Since 2017, the model criteria and subcriteria have evolved to keep pace with the development of the Muslim and the overall travel market. This year “Communications” category has been revamped. The new sub-categories are “Communications Proficiency”, “Destination Marketing” and “Stakeholder Awareness”. Further, additional metrics are used to evaluate relevant existing sub-categories that have direct impact due to the pandemic.

Although the “Visa Requirements” and “Unique Experiences” continue to be part of the ACES model, these two metrics are not taken into account in this years GMTI ranking.

Each of the key factors are assessed using quantitative measurements across several criteria. Each criteria score is derived using several sub-criteria. In total, more than 40 data sets are used to compile the GMTI scores based on the ACES 3.0 model.



TRAVEL READINESS AUGMENTING MUSLIM-FRIENDLY ENVIRONMENT

As COVID-19 continues to become endemic, destinations which aim to successfully attract Muslim travelers must cater to both the travelers' faith-based service needs as well as effectively manage COVID-19. Accordingly, Muslim travelers will be able to assess the degree to which the destination is Muslim-friendly and its level of travel readiness in determining their destination of choice.

CRITERIA	MUSLIM-FRIENDLY ENVIRONMENT	TRAVEL READINESS
OBJECTIVE	To assess how well destinations are able to cater to the faith-based service needs of Muslim travelers.	To assess how ready destinations are to re-open and manage their tourism economy with COVID-19.
DRIVERS	Ease of access, facilitation of communications, comfortable environment and quality services.	Prevention, detection and control measures related to COVID-19.
FUTURE	Stable as there continues to be rising demand for Muslim-friendly travel.	More destinations have begun to better manage COVID-19 with efficient testing, widespread vaccination and cooperation from general public.

TRAVEL READINESS INDICATORS

As the health environment is crucial for any travel re-opening, GMTI ranking has been correlated with the Travel Readiness Indicators (TRI) to measure the travel readiness of destinations. 3 categories of data have been used for this purpose:

PREVENTION

This metrics is based on the vaccination roll-out and public information campaigns.

DETECTION

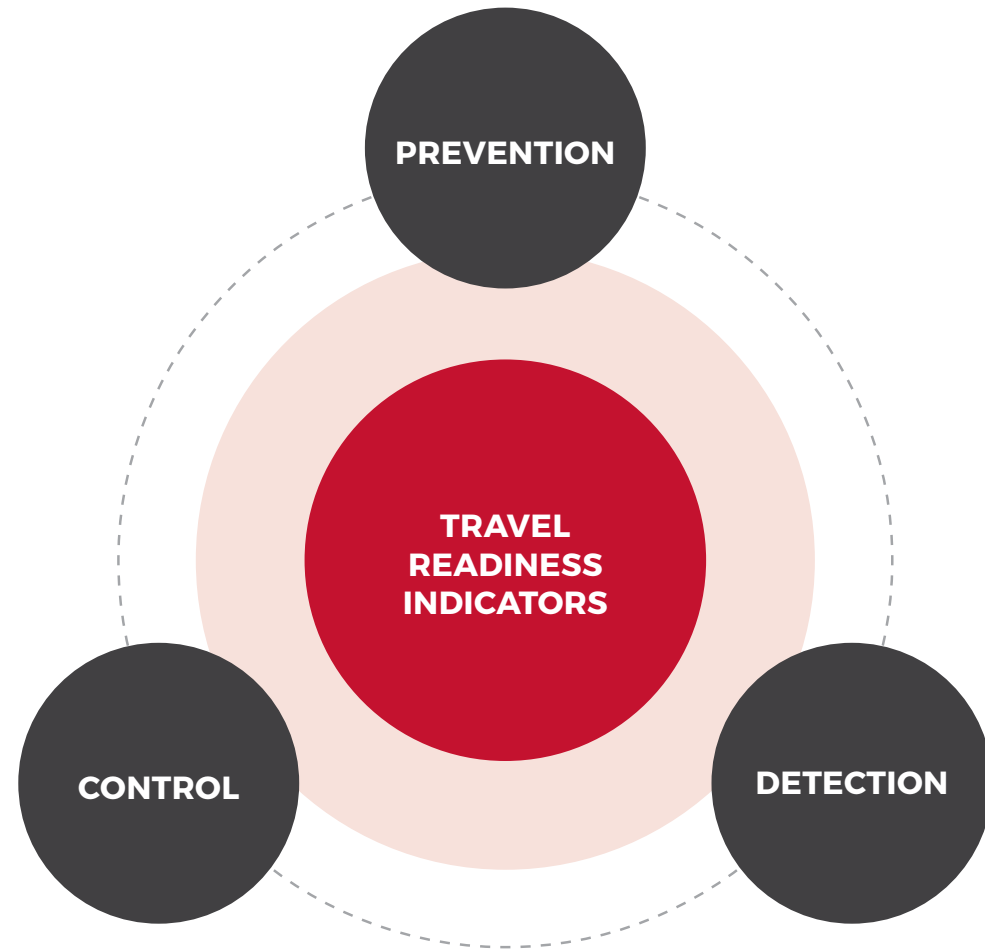
This looks at the testing policy of destinations

CONTROL

Control measures have been separated into contact control which includes contact tracing and mask usage requirements at the destination and movement control that comprises of movement restriction measures, such as work from home, school closures, event cancellations

The data sets used are from the Coronavirus Government Response Tracker (OxCGRT), published and managed by researchers at the Blavatnik School of Government at the University of Oxford.

As the COVID-19 situation is evolving on a daily basis, 20th June 2021 data is used to get a snapshot of how they correlate with the destination which are ranked high in the GMTI 2021.



140 DESTINATIONS RANKED IN GMTI 2021

The global Muslim population is diverse and geographically distributed into segments in Muslim majority destinations as well as sizeable minorities in other destinations.

Taking that into account, the first edition of the GMTI in 2015 ranked 100 destinations. The number of destinations was increased to 130 in 2016 and has been the case for the GMTI editions of 2017, 2018, and 2019.

The GMTI 2021 ranks 140 destinations. Some destinations have been dropped, and new ones added. These destinations now account for more than 95% of Muslim visitor arrivals.

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

GMTI 2021 RESULTS

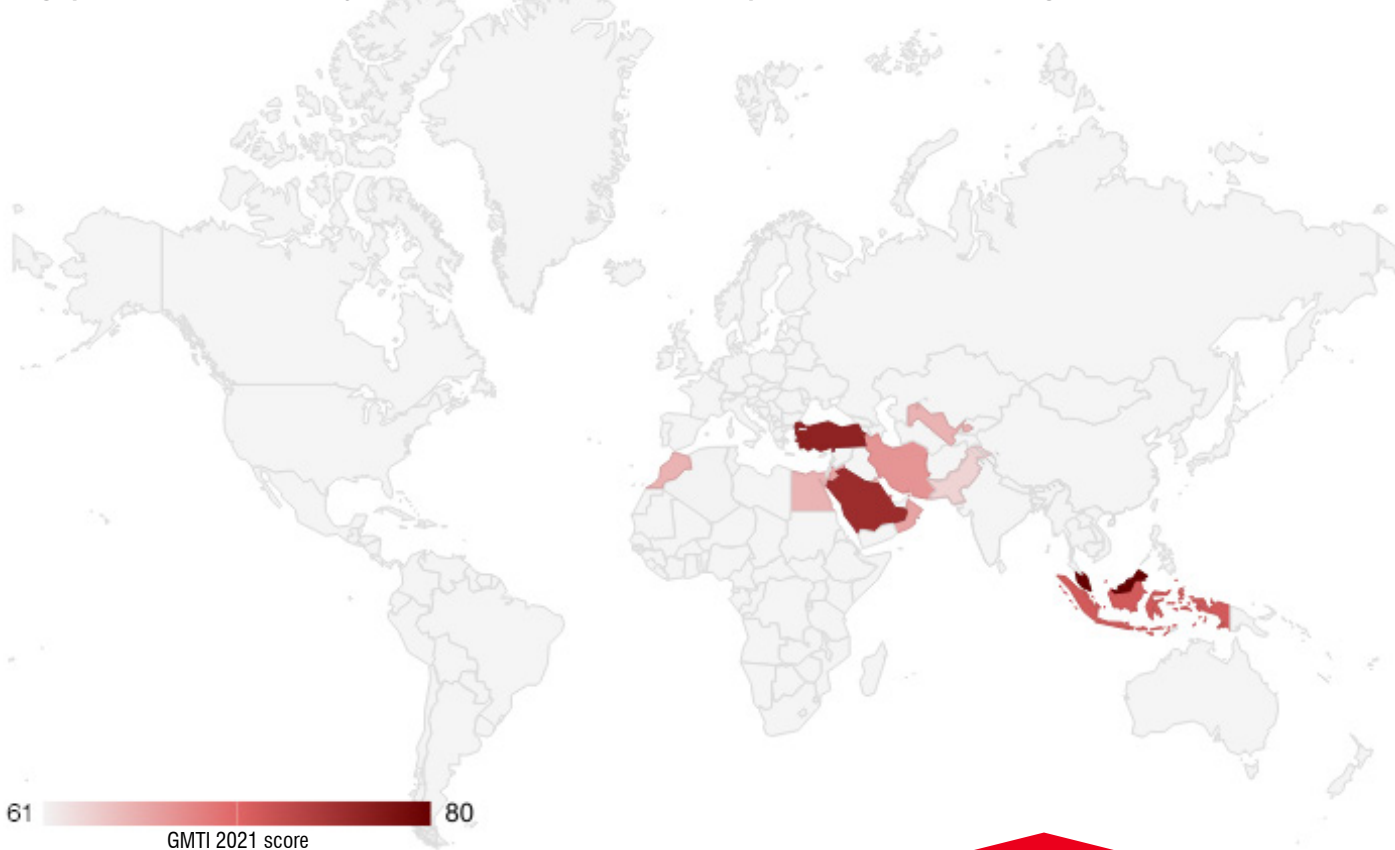


TOP 20 DESTINATIONS - GMTI 2021 RANKINGS

Although pandemic has ravaged the tourism sector, when it comes to Muslim friendly facilities and services, the foundations that destinations have been putting in place for a number of years remain ready to be activated as travel reopens. Some destinations have continued driving stakeholder awareness, capacity building, and destination marketing to the Muslim outbound markets even during the pandemic.

Malaysia remains the top-ranked destination in the GMTI 2021 as it has been since the launch of the Index in 2015. It is followed by Turkey and Saudi Arabia. However, the destination which has made the most significant leap is Uzbekistan. During the last few years, it has initiated several projects to capitalize on its very rich Islamic heritage to develop what it calls Ziyarah Tourism.

Singapore remains the only non-OIC destination in the top 20 GMTI 2021 ranking.



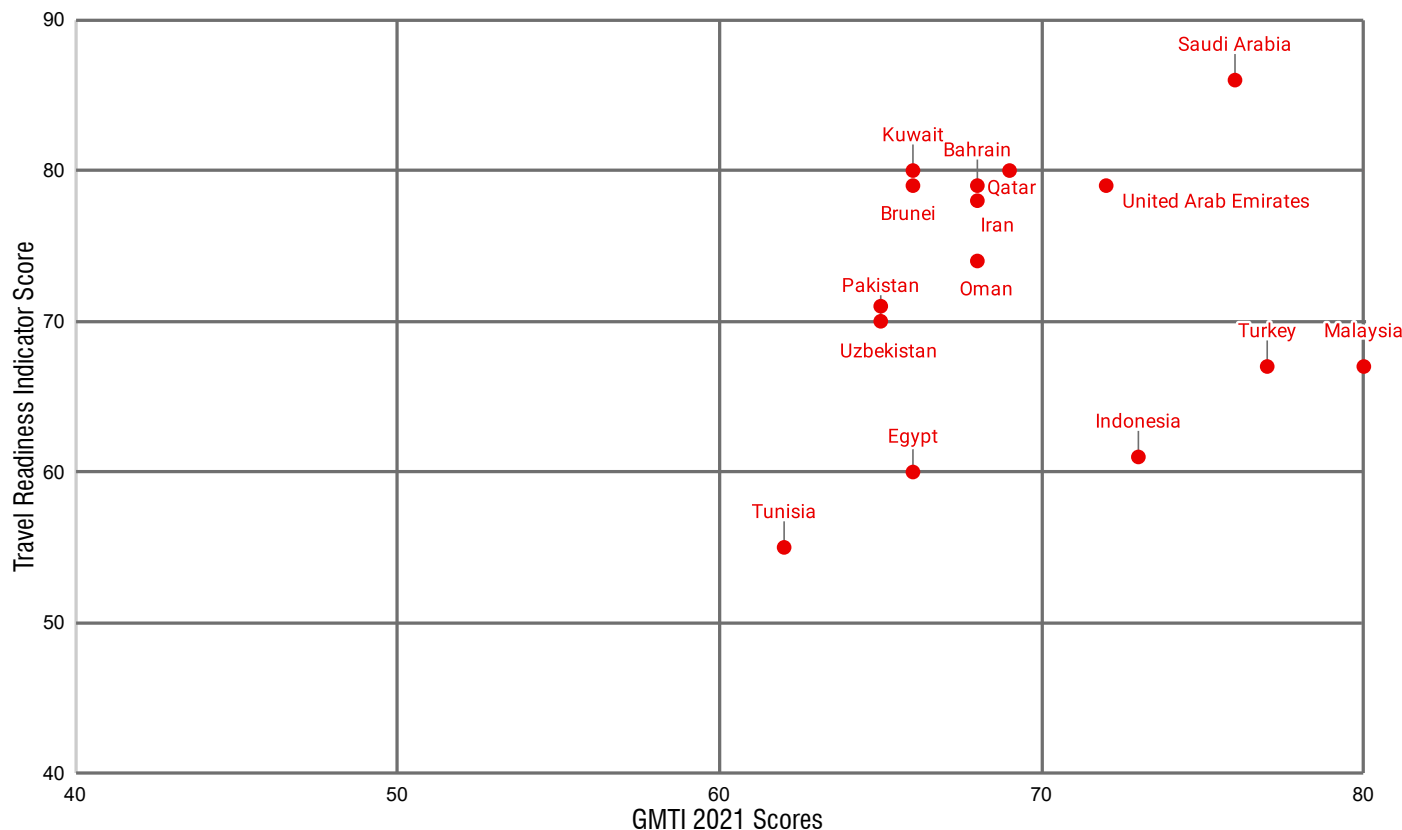
GMTI 2021 Rank	Change vs 2019	Country	GMTI 2021 Score
1	0	Malaysia	80
2	1	Turkey	77
3	1	Saudi Arabia	76
4	-3	Indonesia	73
5	0	United Arab Emirates	72
6	0	Qatar	69
6	0	Singapore	69
8	0	Bahrain	68
8	4	Iran	68
8	0	Oman	68
11	1	Jordan	67
12	-2	Brunei	66
12	2	Egypt	66
12	3	Kuwait	66
12	-5	Morocco	66
16	0	Pakistan	65
16	6	Uzbekistan	65
18	1	Algeria	62
18	-2	Tunisia	62
20	-1	Lebanon	61
20	2	Maldives	61

TRAVEL READINESS INDICATORS

TOP OIC DESTINATION IN GMTI 2021

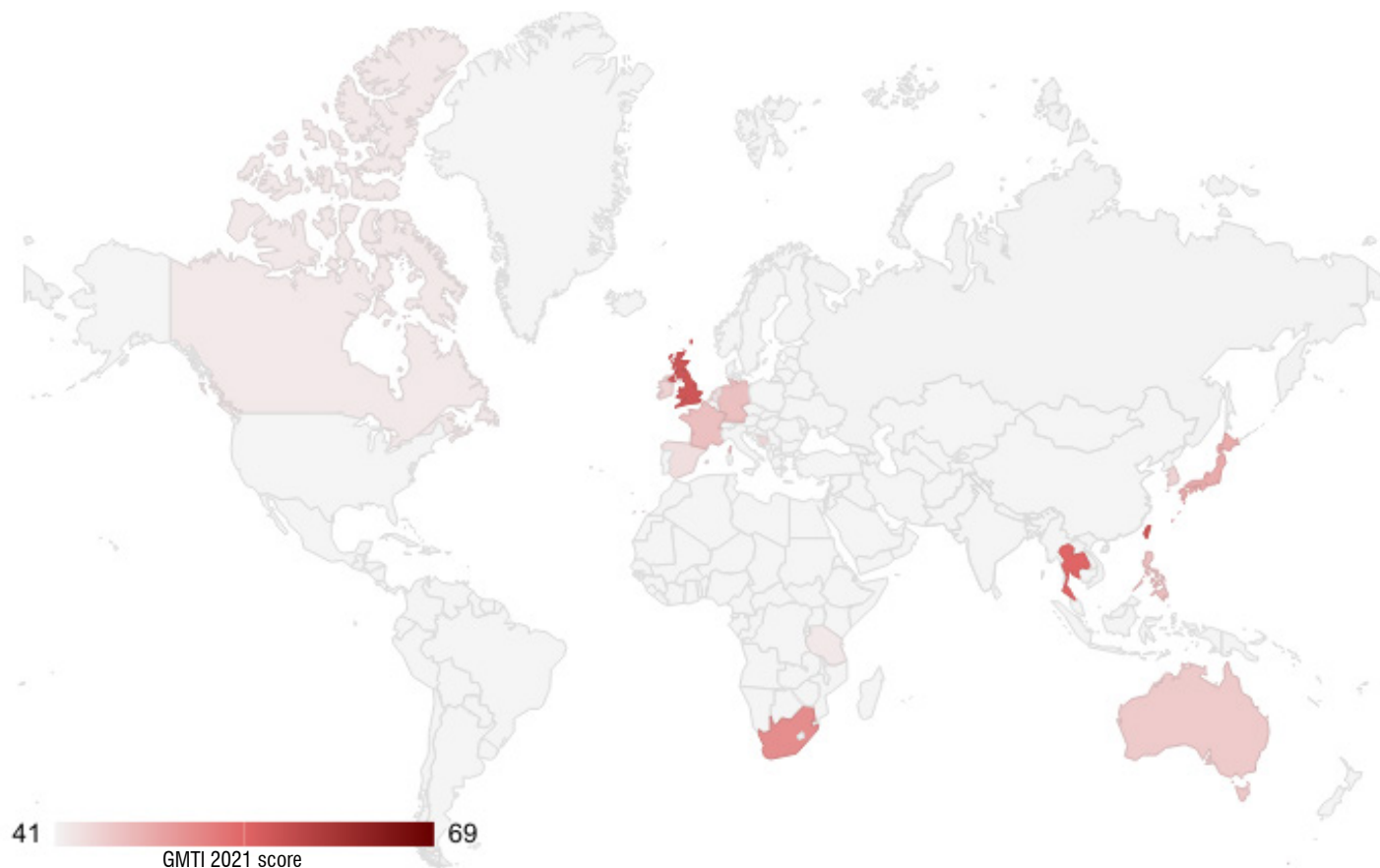
The health environment is crucial for any travel re-start. As such, the top OIC destinations of GMTI 2021 have been correlated with the Travel Readiness Indicators (TRI) of the destinations based on the Prevent, Detection & Control model as described on page 17. Due to the continuously evolving nature of the way COVID-19 impacts the destinations and how they respond to it, these data sets have to be continually monitored to track the overall readiness of the destination for travel.

The TRI data used in this chart is based on 20th June 2021 data. Based on these data, the GCC destinations such as Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Kuwait are in a better position to re-start travel, at least within the region.



TOP 20 NON-OIC DESTINATIONS - GMTI 2021 RANKINGS

Singapore continues to be the top-ranked non-OIC destination. Singapore has held the top position since the inception of GMTI in 2015. The UK has climbed up to the 2nd position. Taiwan, Thailand, Hong Kong, South Africa and Japan continue to be featured in the top 10 destinations. These destinations have continued to do some level of passive marketing to the Muslim market even during the pandemic.



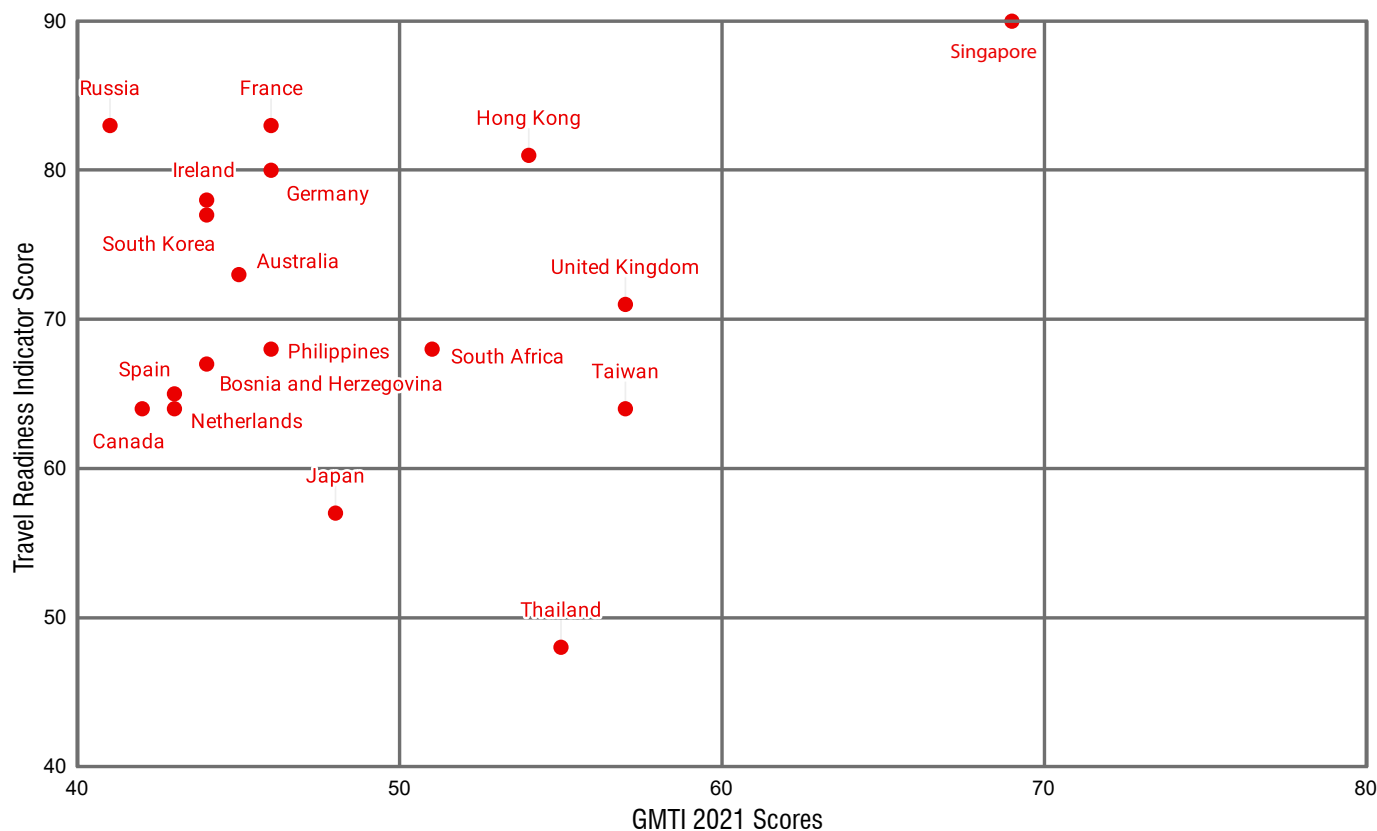
Rank	Change vs 2019	GMTI 2021 Rank	GMTI 2021 Score
1	0	6	Singapore 69
2	3	25	Taiwan 57
2	1	25	United Kingdom..... 57
4	-2	29	Thailand 55
5	2	30	Hong Kong 54
6	-1	32	South Africa 51
7	-3	35	Japan..... 48
8	1	36	France..... 46
8	5	36	Germany 46
8	3	36	Philippines 46
8	9	36	United States of America 46
12	3	43	Australia..... 45
13	2	45	Bosnia And Herzegovina..... 44
13	6	45	Ireland..... 44
13	-5	45	South Korea 44
16	16	48	Netherlands..... 43
16	-6	48	Spain 43
18	0	50	Canada 42
18	1	50	Tanzania..... 42
20	-3	53	Russia 41

TRAVEL READINESS INDICATORS

TOP NON - OIC DESTINATION IN GMTI 2021

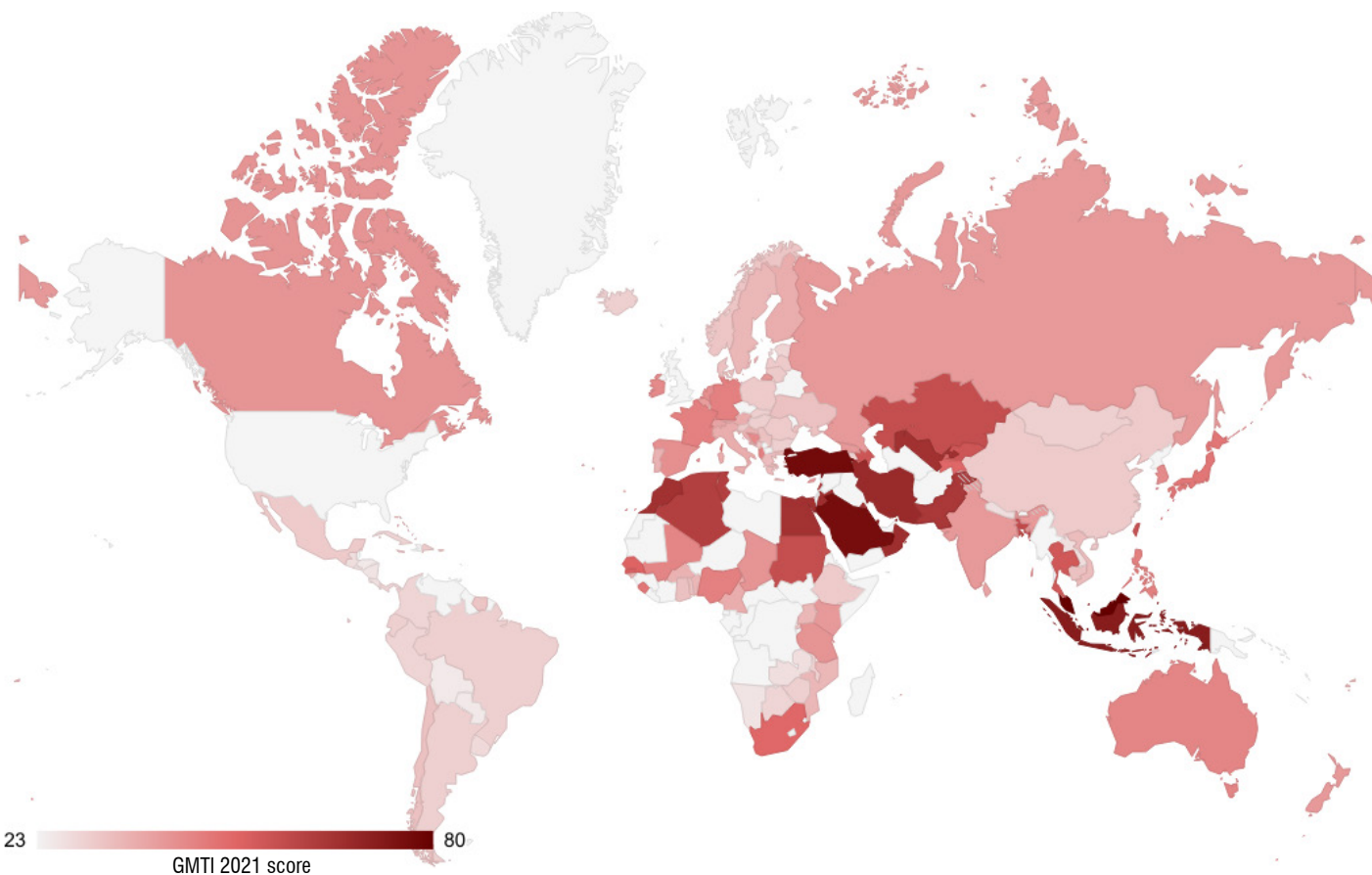
This chart maps the correlation of the GMTI scores of the top non-OIC destinations of GMTI 2021 with the Travel Readiness Indicators (TRI) of the destinations based on the Prevention, Detection & Control model as described on page 17.

The TRI data used in this chart is based on 20th June 2021 data. Based on these data, destinations such as Singapore & Hong Kong are better prepared to re-start travel.



GMTI 2021 RANKINGS - REGIONAL ANALYSIS

Western Asia and North Africa are the highest-ranked regions in the GMTI 2021. This is due to these two regions being mainly composed of predominantly Muslim majority destinations. Western Asia includes Turkey and the GCC countries. The leading destinations in North Africa are Egypt and Morocco. They are followed by Central Asia and South-Eastern Asia. Eastern Europe and South America are among the lowest-ranked destinations in the GMTI 2021.



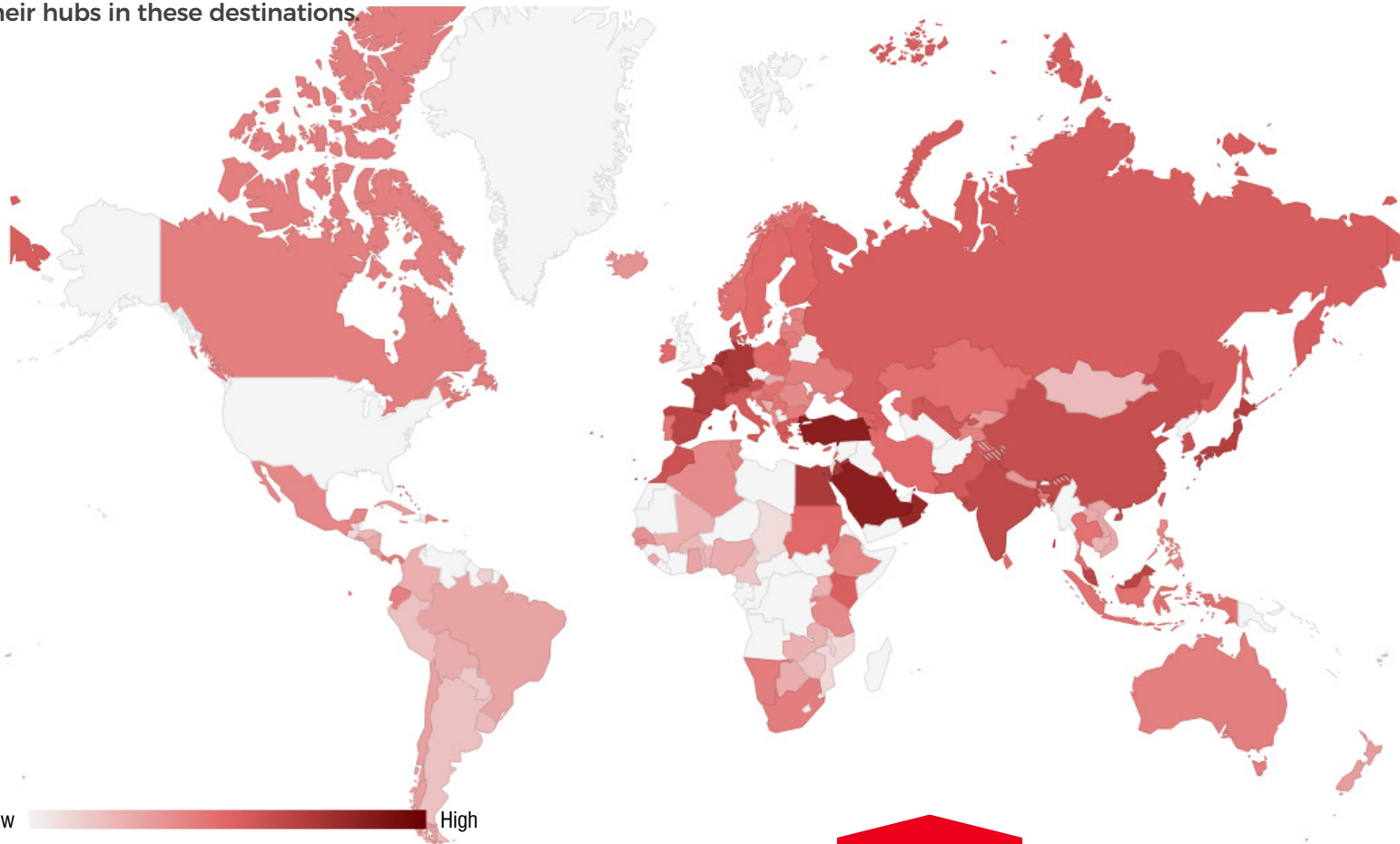
Region	Average GMTI 2021 Score	Top 2 Destinations
Western Asia	62	Turkey/Saudi Arabia
North Africa	62	Egypt/Morocco
Central Asia	57	Uzbekistan/Kazakistan
South Eastern Asia	53	Malaysia/Indonesia
Southern-Asia	51	Iran/Pakistan
Eastern Asia	44	Taiwan/Hong Kong
Western Europe	41	France/Germany
Oceania	38	Australia/New Zealand
Southern Europe	37	Albania/Bosnia & Herzegovina
Notern Europe	36	UK/Ireland
Sub-Saharan Africa	36	Senegal/South Africa
Eastern Europe	33	Russia/Czechia
South America	29	Bahamas/Chile

GMTI 2021 RANKINGS - ACCESS

CONNECTIVITY | TRANSPORT INFRASTRUCTURE

Destination access is the key impediment of the COVID-19 restriction measures. This metric considers air connectivity, land connectivity, and transport infrastructure at the destination. Given the current pandemic crisis this year, it also takes into account international travel restrictions. It is measured based on connectivity to the top thirty Muslim outbound markets. The "Visa Requirement" metric is not taken into account this year. Currently, destination connectivity has been hugely disrupted and constantly changing due to the pandemic. Therefore, these scores are based on May 2021 status.

United Arab Emirates, Qatar, and Turkey head the list. That is due to Emirates, Qatar Airlines, and Turkish Airlines having their hubs in these destinations.



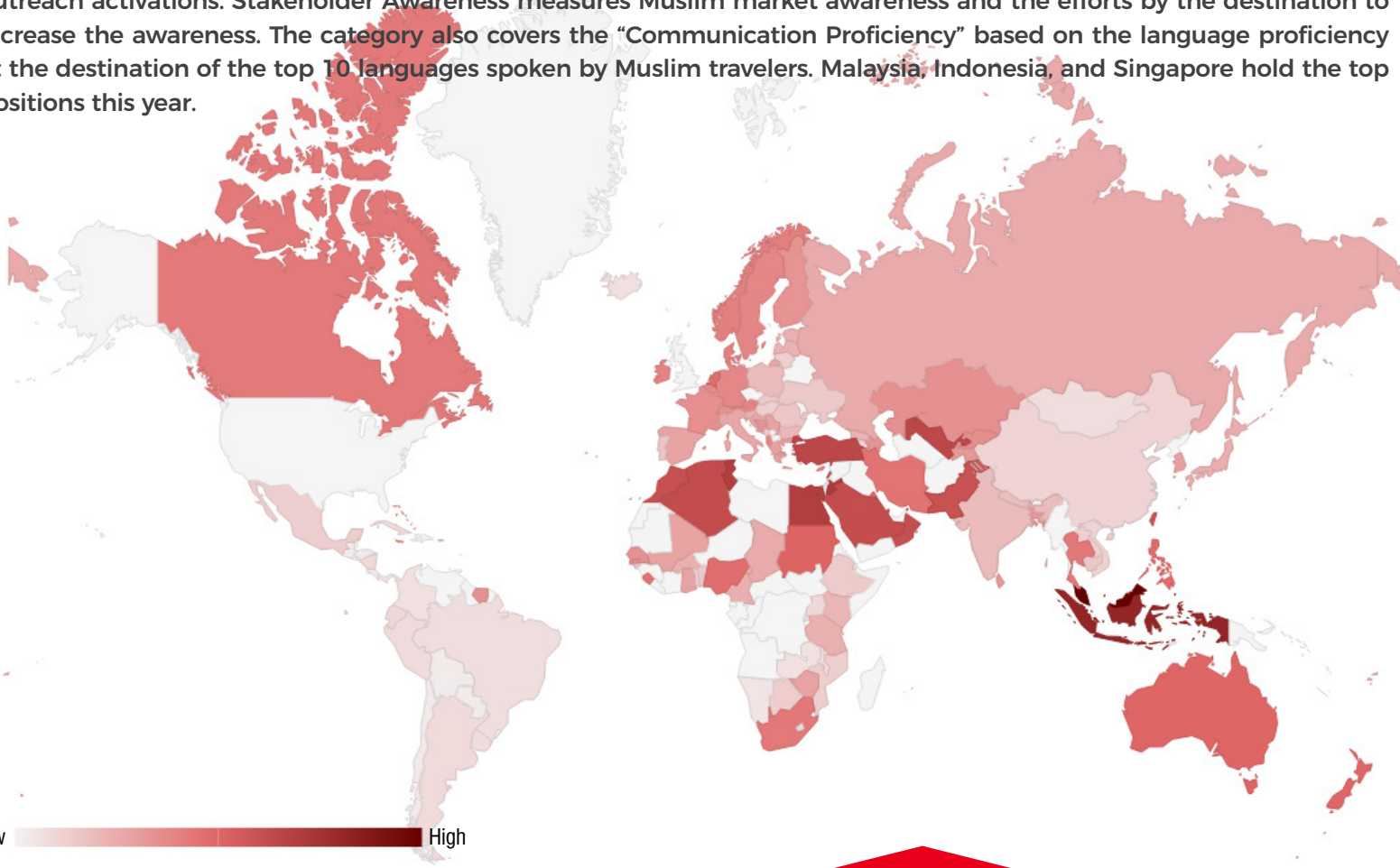
THE TOP 10 DESTINATIONS IN THE ACCESS CATEGORY

- United Arab Emirates
- Qatar
- Turkey
- Saudi Arabia
- Oman
- Netherlands
- Germany
- Jordan
- Egypt
- Singapore

GMTI 2021 RANKINGS - COMMUNICATIONS

COMMUNICATION | STAKEHOLDER AWARENESS

This year “Communications” category has been revamped. The new sub-categories are “Communications Proficiency”, “Destination Marketing” and “Stakeholder Awareness”. Some of the metrics used in the earlier subcategories have been realigned to the these new sub-categories. This metric is now focused on understanding destination marketing efforts to Muslim travelers as well as educating the travel stakeholders at the destination. Destination Marketing measures efforts to reach out to the Muslim market via digital online content, Muslim visitor guides, media mentions, and other marketing outreach activations. Stakeholder Awareness measures Muslim market awareness and the efforts by the destination to increase the awareness. The category also covers the “Communication Proficiency” based on the language proficiency at the destination of the top 10 languages spoken by Muslim travelers. Malaysia, Indonesia, and Singapore hold the top positions this year.



THE TOP 10 DESTINATIONS IN THE COMMUNICATIONS CATEGORY

- Malaysia
- Indonesia
- Singapore
- Jordan
- Egypt
- Tunisia
- Turkey
- Lebanon
- Uzbekistan
- United Arab Emirates

MUSLIM VISITOR GUIDES

The “Communication” category looks at how destinations are marketing to Muslim travelers. Some destinations have continued to roll out digital marketing campaigns targeted at the Muslim travel segment even during the pandemic. Several destinations have published Muslim Visitor Guides (MVG) over the last few years. They have generally been in the form of downloadable online guides and in some cases, as physical printed copies.

Some of the MVGs have highlighted many Muslim-friendly services, facilities, and experiences of the destination, while other destinations have just focused on publishing Halal food guides.

Some of the destinations that have published MVGs during last few years include Australia, New Zealand, South Korea, Japan, Indonesia, Philippines, Singapore, to name a few. These MVGs not only inspire Muslim travelers for travel beyond the pandemic but also enable them to search for the relevant services with ease.

HALAL RESTAURANTS PAGE

Cheonhaecheon
25, Halladaehak-ro, Jeju-si
+82-64-742-1101
11:00 ~ 23:00

Crescent Rating accreditation displayed on each restaurant listing

***Crescent Rated restaurants will have visibility on CR.com and are entitled to marketing benefits**

MUSLIM FRIENDLY RESTAURANTS IN JEJU

Begdad
36, Seogwipo 3D-gil, Jeju-si
+82-64-757-8182
11:00 ~ 23:00

Beckrokhogwon
222, Seodang, Seogwipo-eup, Seogwipo-si
+82-64-762-8001
09:30 ~ 21:00

Cheonhaecheon
25, Halladaehak-ro, Jeju-si
+82-64-742-1101
11:00 ~ 23:00

Tammasara
44, Seodangri, Jeju-si
+82-64-729-4380
Breakfast 06:30~10:00
Lunch 12:00~14:30
Dinner 18:00~22:00
(Reservations required)

Indian Kitchen
191 Anseong, Anseong-eup, Jeju-si
+82-64-799-5809
11:30~22:00
(Closed every Monday)

The Blue
44, Seodangri, Jeju-si
+82-64-729-8305
Breakfast 06:30~10:00
Lunch 12:00~14:30
Dinner 18:00~21:30
(Reservations required)

Badapungkyung
654, Seohae-ro, Jeju-si
+82-64-711-7992
11:00 ~ 23:00

Daewonga
15, Dongan-ro 1-gil, Jeju-si
+82-64-753-2030
09:00 ~ 21:00

Rajmahal
43, Seogwipo, Jeju-si
+82-64-749-4924
11:00 ~ 23:00

Badajanchi
79, Seodangri, Jeju-si
+82-64-762-8909
09:00 ~ 21:00

Uribang
278, Seodangri, Seogwipo-eup, Seogwipo-si
+82-64-762-0932
09:00 ~ 23:00
(Closed every second Wednesday)

Mulmangul
47, Beomdeong-gil, Anseong-eup, Jeju-si
+82-64-713-3404
10:00 ~ 19:00
(Closed every Monday)

Chunsaemine
16, Changcheonjaeng-ro 2Bilbeom-gil, Anseong-eup, Seogwipo-si
+82-64-774-0310
10:00 ~ 20:00
(Closed every Monday)

Crescent Rating Legend:
AAA Halal certified. No alcohol served.
AA Muslim owned restaurant. No alcohol served.
A Halal certified or Muslim-owned. Alcohol served.
B Only Halal certified meat is used in restaurant. May serve alcohol.
C Strictly vegetarian or seafood. May serve alcohol.
D Halal food on request. Non-Halal meat is also served but menu is pork-free. May serve alcohol.

Crescent Rating legend to explain the various levels of Muslim friendliness

Taken from the Muslim Visitor Guide with Jeju Tourism Organization

ITINERARY PAGE

TRAVEL ITINERARIES
FAMILY FUN
Grab the kids and have a blast! From indoor activity parks to outdoor adventure lands, this little red dot says yes to endless fun with the kids, be it rain or shine.

Itineraries tailored to the target audience

DAY 1
...
Dinner at DC Superheroes Cafe
Al-Falah Mosque
5 min

DAY 2
...
Al-Falah Mosque
5 min

DAY 3 - SENTOSA
...
Al-Falah Mosque
5 min

DAY 4
...
Al-Falah Mosque
5 min

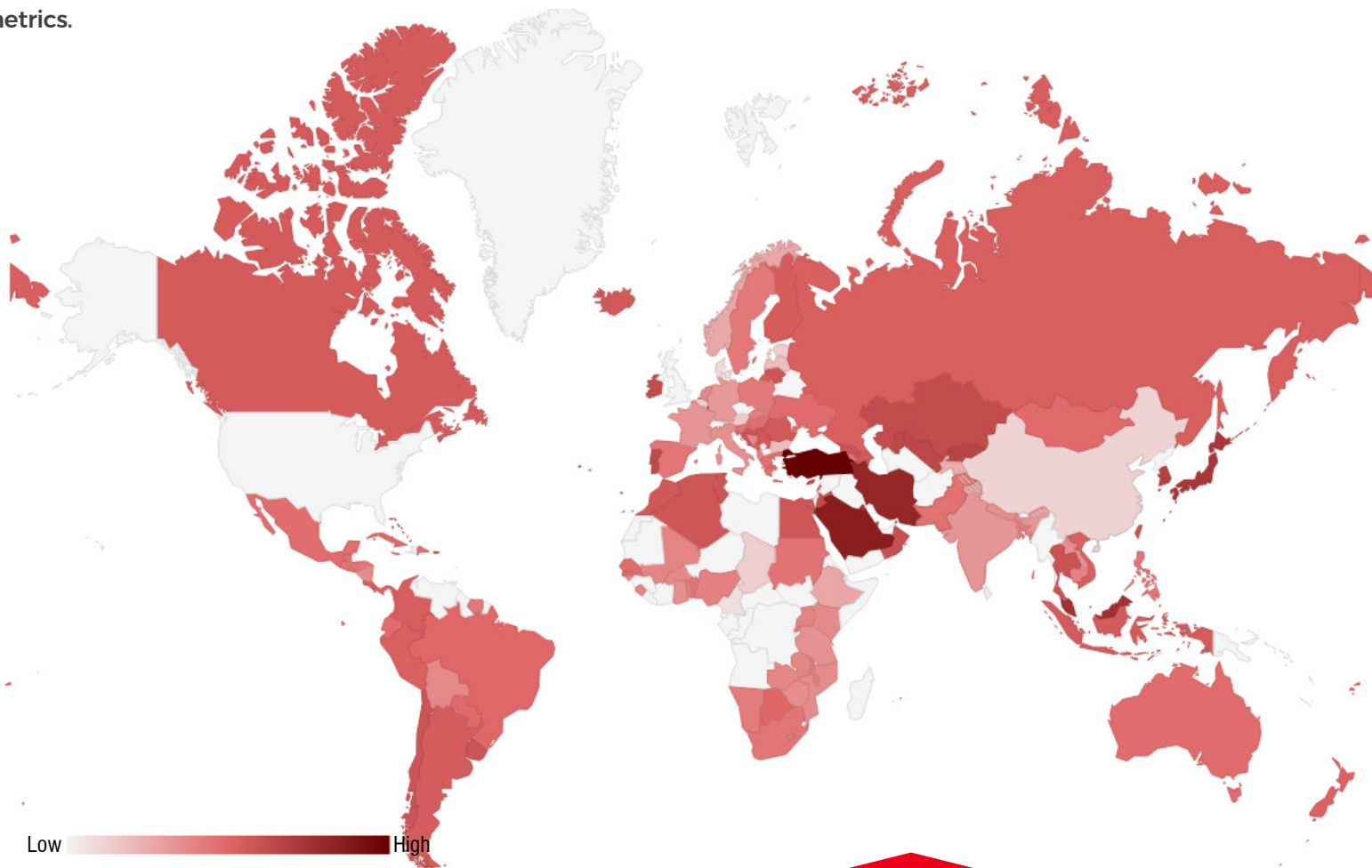
Icon to indicate nearest prayer place for ease of reference

Taken from the Muslim Visitor Guide with Singapore Tourism Board

GMTI 2021 RANKINGS - ENVIRONMENT

SAFETY | FAITH RESTRICTIONS | VISITOR ARRIVALS | ENABLING CLIMATE

The “Environment” category continues to look at the Muslim travelers’ need to feel safe and face little restrictions in practicing their faith in the destination. These include any dress code restrictions and hate crimes. In addition, the destination’s enabling climate, including its institutions, research and development, and use of information technology, is a significant factor for innovation and sustainability in the environment. This year, it also considers how the destination is coping with the economic impact of the pandemic. As for the Visitor arrivals, 2019 visitor arrival data is used for these metrics.



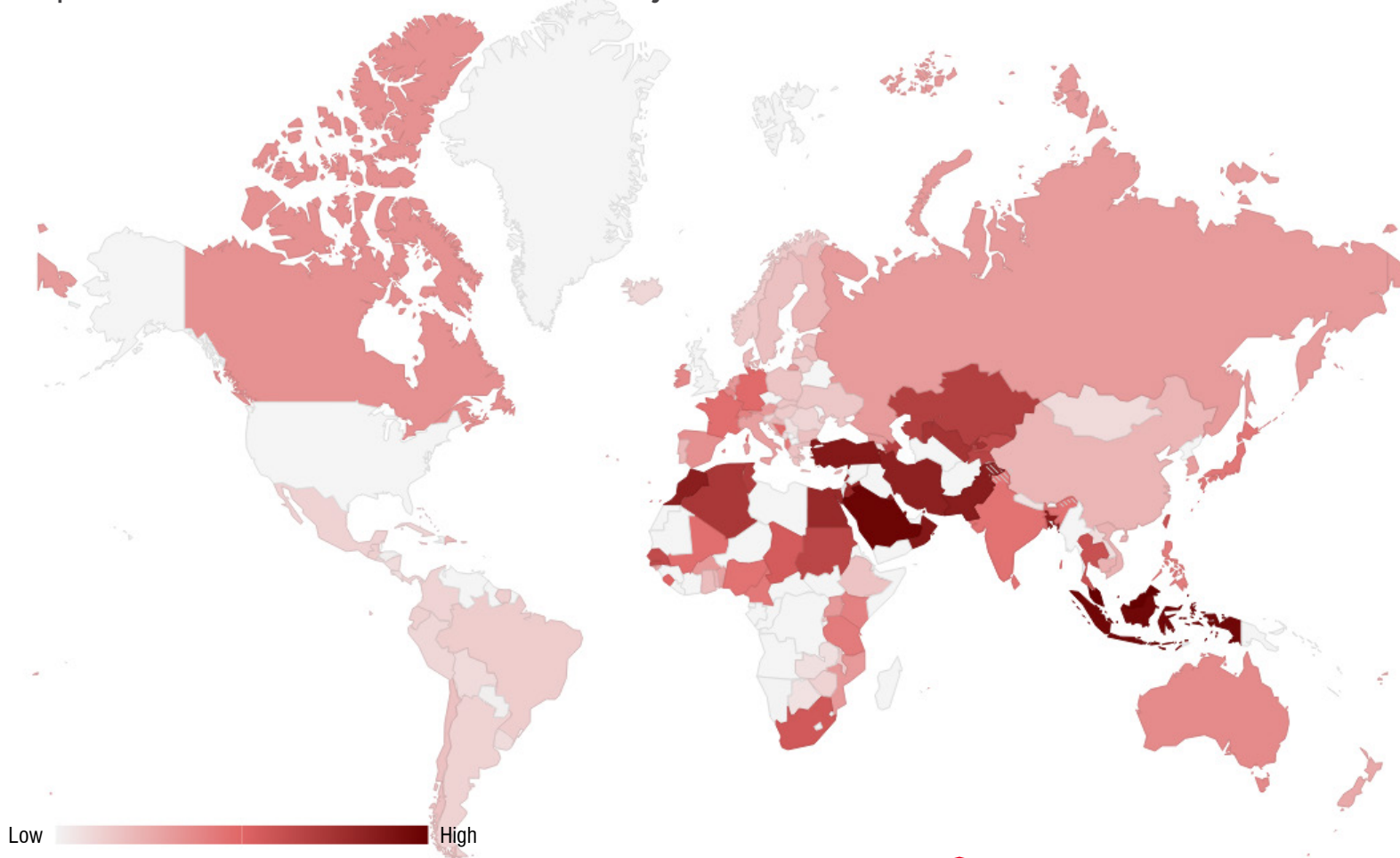
THE TOP 10 DESTINATIONS IN THE ENVIRONMENT CATEGORY

- Turkey
- Bahrain
- Saudi Arabia
- Singapore
- Iran
- Malaysia
- United Arab Emirates
- Kuwait
- Japan
- Andorra

GMTI 2021 RANKINGS - SERVICES

CORE NEEDS | CORE SERVICES

No major changes has been made to this category, The services evaluated in order for destinations to provide good service experiences to Muslim travelers remains the same. It is still important to cater to the faith-based needs of Muslim travelers in touchpoints including restaurants, hotels and airports. As the service industry was massively disrupted in 2020, 2019 data is used in these metrics. Although experiences will remain as part of the ACES 3.0 model, "Unique Experiences" have not been taken in to account in this years scores.



THE TOP 10 DESTINATIONS IN THE SERVICES CATEGORY

- Malaysia
- Saudi Arabia
- Indonesia
- United Arab Emirates
- Qatar
- Brunei
- Oman
- Turkey
- Kuwait
- Bangladesh

HALAL DINING SCENE

The key service that Muslim travelers are looking for is the availability of Halal Food at the destination. During the last few years, the availability of Halal food has increased in many destinations. In some destinations such as Taiwan, the number of halal-certified restaurants has tripled during the last 5 to 6 years. Unfortunately, the pandemic has severely disrupted Japan’s efforts to develop Halal dining options. Since there no international visitors, the domestic market has not been large enough to sustain the growth of the Halal food scene in Japan.

The same cannot be said for Singapore. It has one of the most vibrant Halal dining ecosystems, with regional and international cuisines available as Halal options. Its growth has been largely due to the local Singapore Muslims’ who spent an estimated USD 520 Million in 2019 on Halal dining. The Mastercard-Crescentrating Halal Food Lifestyle Singapore 2021 had an in-depth look at the Halal food lifestyle market size, including the preferences and behaviors of Muslim consumers in Singapore.

When it comes to Halal assurance, the insights reveal that consumers have three different levels of perceived assurance in response to current Halal assurance practices by establishments in the industry. While signages such as ‘No Pork No Lard’ may be relatively easier to implement, more robust Halal assurance, including certification and rating, leads to greater trust and brand building with Muslim consumers.

STRONG Halal Assurance

Halal certification, Muslim-friendly rating, Halal Arabic logo, Halal minimalist symbol, descriptor ‘Ingredients suitable for Muslims’

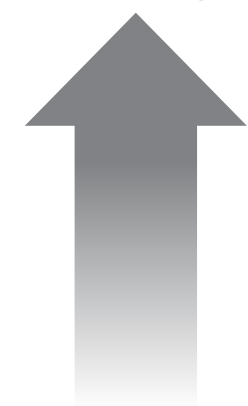
REASONABLE Halal Assurance

Muslim seller, Muslim brand, Muslim country of origin, general seafood or vegetarian dishes, safe ingredient codes, inference of no alcohol, pork or cross-contamination

DOUBTFUL Halal Assurance

‘No Pork No Lard’ signs, images of mosques, Middle Eastern artefacts and Muslim faces and names, pseudo-Arabic font alphabets

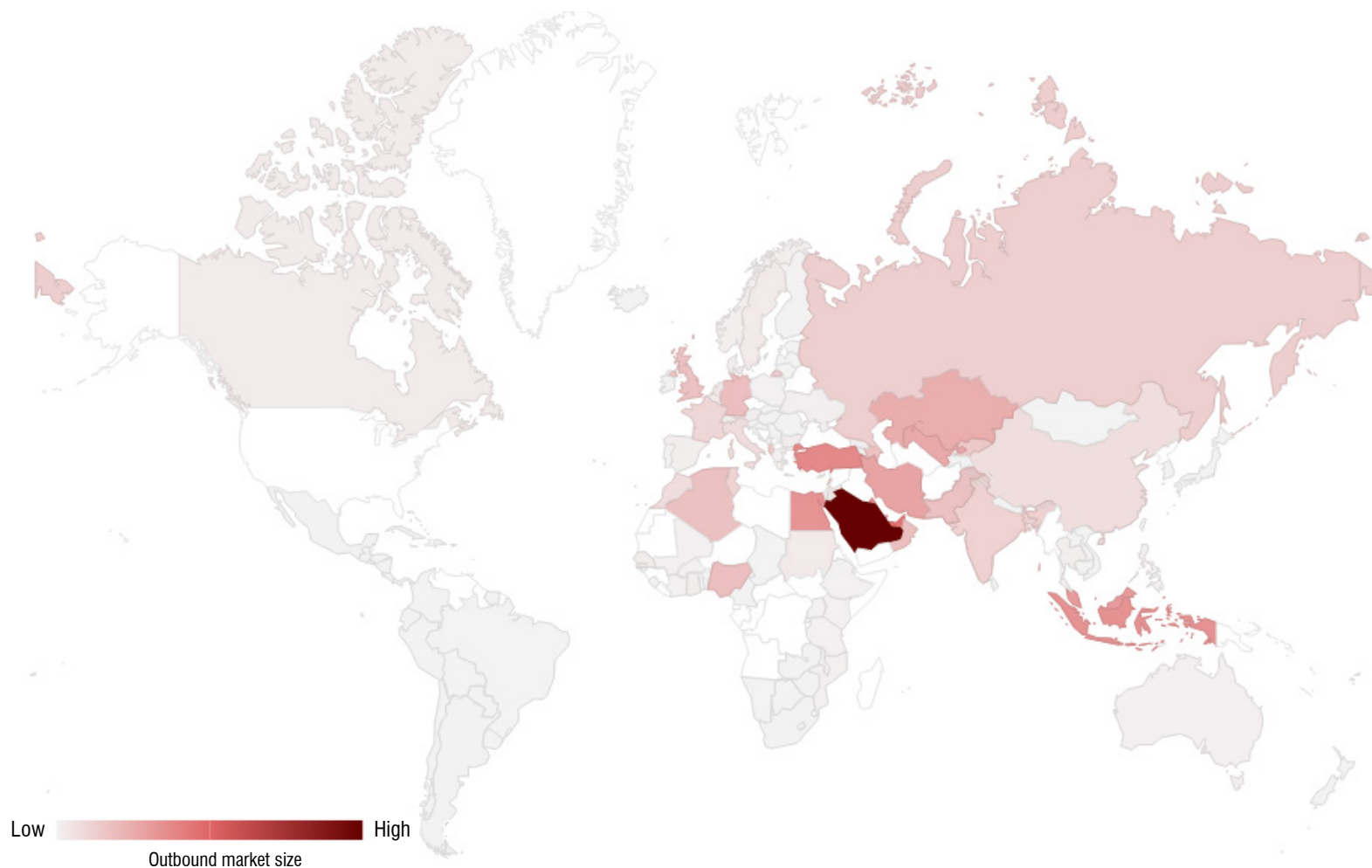
Trust & Brand Building



Ease of Implementation

TOP 20 OUTBOUND MARKETS

The top 20 outbound markets in 2019 accounted for around 78% of the total Muslim Muslim outbound. By region, GCC accounts for 30%, SEA 10%, Central Asia 9% and Western Europe 7%.

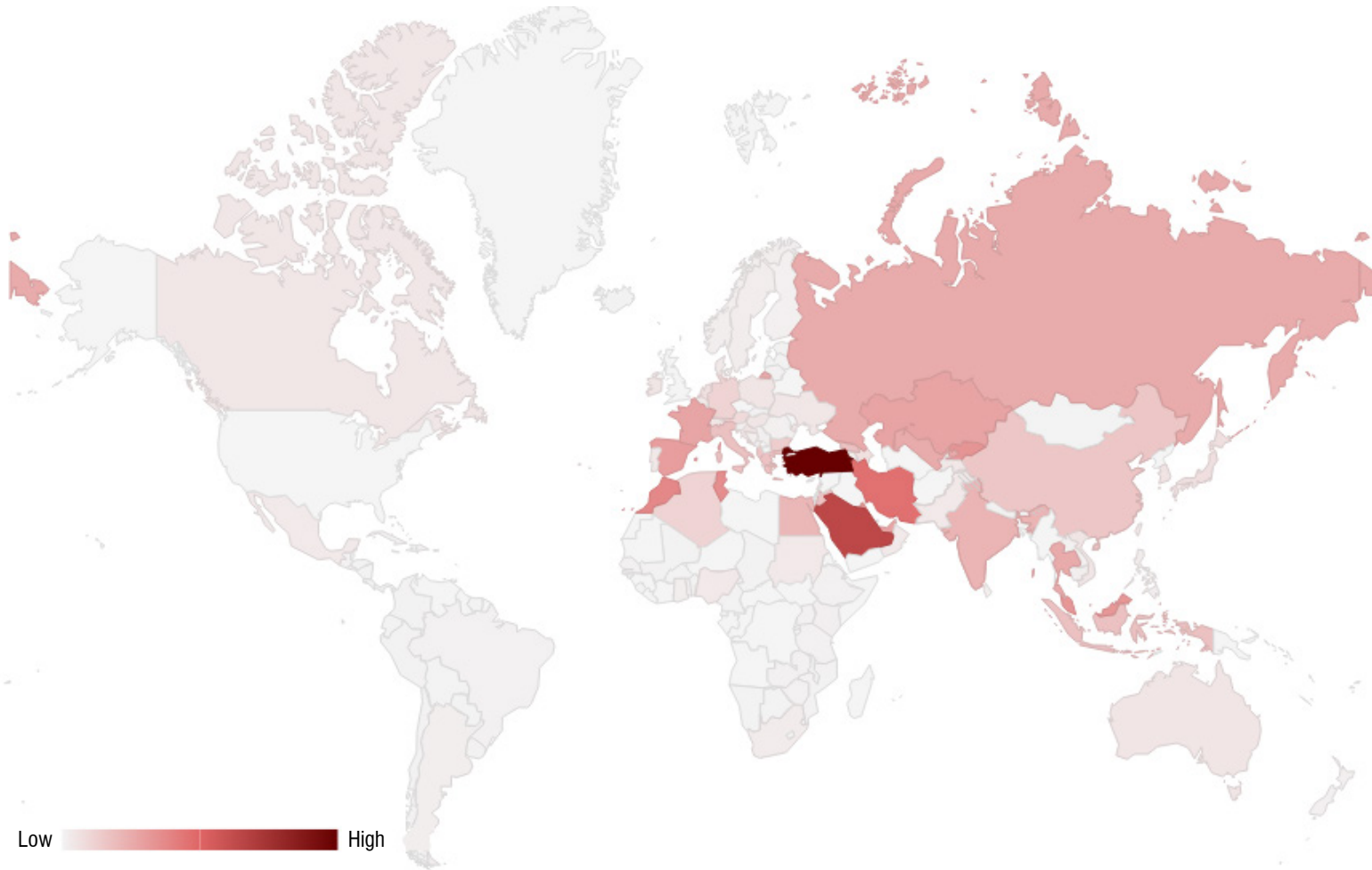


THE TOP 20 OUTBOUND MARKETS

- Saudi Arabia
- United Arab Emirates
- Turkey
- Kuwait
- Indonesia
- Egypt
- Malaysia
- Qatar
- Iran
- Uzbekistan
- Kazakhstan
- Germany
- Nigeria
- Oman
- Algeria
- Pakistan
- Azerbaijan
- United Kingdom
- Albania
- Kyrgyzstan

TOP 20 INBOUND MARKETS

The top Muslim traveler inbound market in 2019 was Turkey, followed by Saudi Arabia. These top 20 destinations account for around 66% of the total Muslim arrivals.

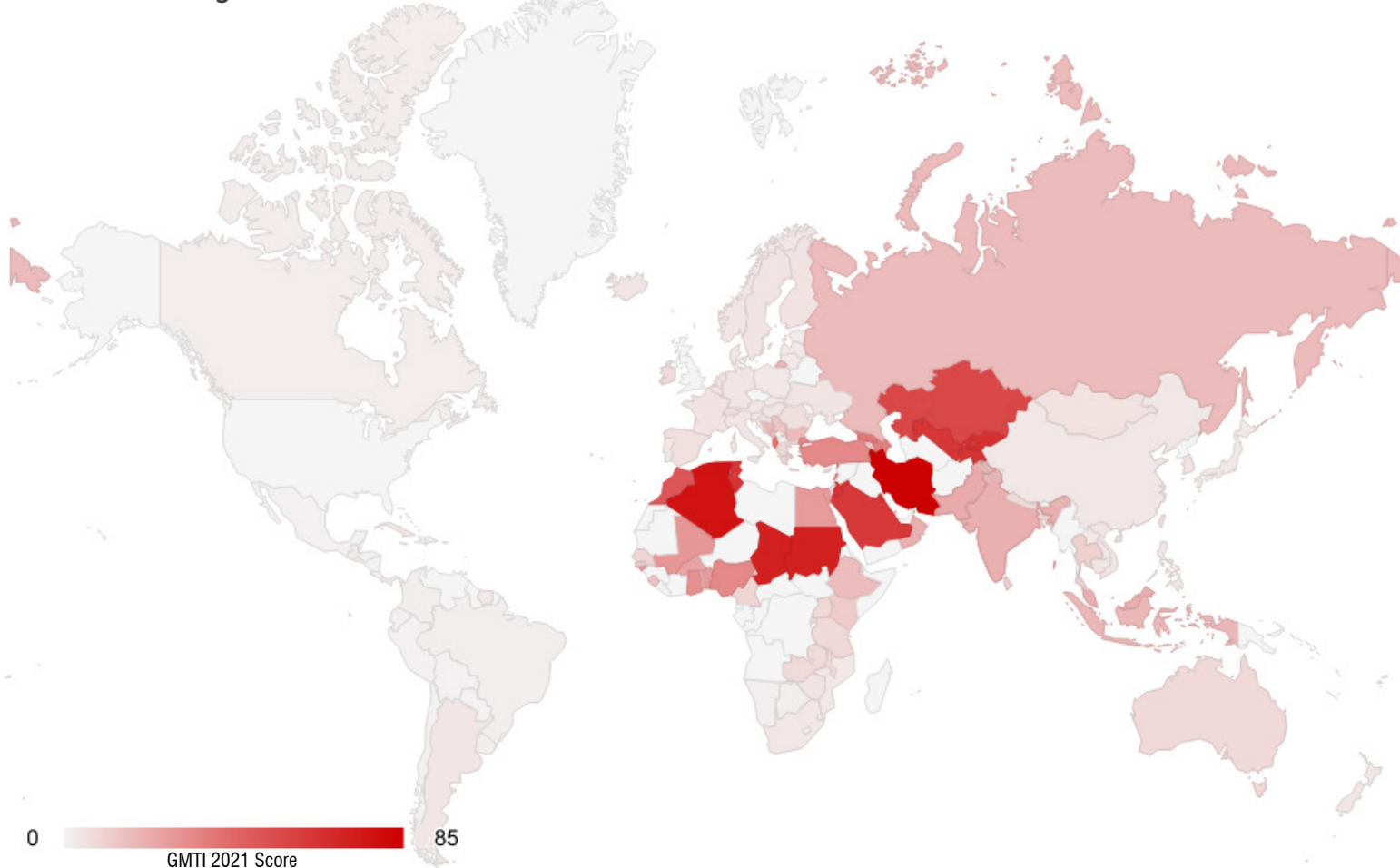


THE TOP 20 INBOUND MARKETS

- Turkey
- Saudi Arabia
- Bahrain
- Iran
- Morocco
- Tunisia
- Kyrgyzstan
- Kuwait
- Malaysia
- Spain
- Kazakhstan
- United Arab Emirates
- France
- Uzbekistan
- Thailand
- Russia
- India
- Singapore
- Egypt
- Italy

TOP MARKETS WITH HIGHEST PERCENTAGE SHARE OF INBOUND MUSLIM TRAVELERS

The global average of Muslim travelers in 2019 compared to the total number of travelers was around 10%. Some destinations have a far higher percentage. The percentage of Muslim visitor arrivals in comparison to the total arrivals to the destination is highest in Iran. Muslim visitor arrivals account for more than 80% of total visitor arrivals in Iran.



THE TOP MARKETS WITH HIGH PERCENTAGE SHARE

- Iran
- Algeria
- Chad
- Sudan
- Bahrain
- Kuwait
- Kyrgyzstan
- Tajikistan
- Jordan
- Tunisia
- Uzbekistan
- Saudi Arabia
- Kazakhstan
- Morocco
- Albania
- Georgia
- Azerbaijan
- Lebanon
- Nigeria
- Turkey

GMTI 2021 RESULTS TABLE

	GMTI 2021 Rank	GMTI 2021 Score	ACCESS (10%)		COMMUNICATION (20%)			Environment (30%)				Services (40%)			
			Connectivity	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	Safety	Faith Restrictions	Visitor Arrivals	Halal Dining	Prayer Places	Airports	Accommodation
Albania	36	46	30	56	22	12	50	52	100	50	22	60	60	33	19
Algeria	18	62	28	60	75	12	51	37	97	100	27	89	100	60	25
Andorra	100	31	19	84	17	0	5	90	100	100	1	20	15	0	18
Argentina	111	30	5	59	6	12	3	53	100	100	2	25	20	0	23
Armenia	111	30	44	61	23	0	0	34	99	100	4	30	25	0	0
Aruba	86	33	7	80	30	0	0	75	100	100	1	20	15	18	32
Australia	42	45	15	78	66	38	7	84	85	67	6	47	30	46	32
Austria	64	37	35	84	59	12	15	85	70	10	8	47	40	9	38
Azerbaijan	27	56	26	83	12	12	51	47	97	100	13	70	90	63	36
Bahamas	78	34	18	80	61	12	0	65	100	100	0	25	15	0	22
Bahrain	8	68	45	76	72	0	40	66	100	100	54	70	100	100	44
Bangladesh	23	59	45	53	14	0	59	31	100	100	2	85	100	89	38
Belgium	57	40	31	75	53	12	16	78	84	0	4	60	50	20	27
Benin	73	35	16	51	13	0	20	29	100	100	7	25	50	33	17
Bolivia	137	25	21	52	7	0	0	27	92	100	0	21	15	0	23
Bosnia and Herzegovina	45	44	25	47	18	12	45	43	88	83	5	55	70	32	34
Botswana	111	30	17	56	27	0	3	44	100	100	1	25	25	0	22
Brazil	111	30	22	55	5	12	0	51	93	100	1	34	15	4	23
Brunei	12	66	12	72	55	17	43	67	100	100	6	90	100	100	51
Bulgaria	111	30	35	59	20	12	15	59	75	33	14	29	20	18	25
Burkina Faso	70	36	22	46	13	0	40	17	97	100	6	25	60	33	17
Cabo Verde	137	25	21	56	0	0	3	29	100	100	1	15	15	0	22
Cambodia	86	33	17	53	18	12	5	22	100	100	2	25	25	39	15
Cameroon	64	37	19	43	38	0	15	22	100	33	2	40	80	33	26
Canada	50	42	16	77	61	12	22	80	72	100	4	47	35	37	26
Chad	50	42	17	35	27	0	30	22	97	33	17	40	60	93	23
Chile	86	33	5	73	7	0	0	62	100	100	0	50	15	0	24
China	111	30	49	69	1	12	13	61	76	17	13	30	25	19	21
Colombia	121	29	15	57	3	12	0	54	99	100	1	21	15	7	24
Costa Rica	129	27	22	58	6	0	0	51	100	100	1	17	15	0	23
Cote d'Ivoire	60	39	16	61	19	0	20	35	100	100	10	40	50	33	22
Croatia	70	36	26	74	35	12	13	67	90	100	5	35	20	6	41
Cuba	121	29	12	66	7	12	0	42	100	100	1	27	15	0	23
Cyprus	57	40	34	72	53	12	20	77	98	100	3	40	40	0	23

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			Connectivity	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	Safety	Faith Restrictions	Visitor Arrivals	Halal Dining	Prayer Places	Airports	Accommodation
Czechia	78	34	28	68	21	12	0	70	84	100	3	25	15	29	24
Denmark	86	33	29	84	63	12	16	91	66	0	4	35	30	9	23
Dominican Republic	100	31	17	72	1	0	0	37	100	100	1	25	15	33	23
Ecuador	111	30	22	70	21	0	0	41	100	100	0	22	15	11	23
Egypt	12	66	56	75	89	12	51	38	100	100	23	85	100	74	39
El Salvador	129	27	18	62	7	0	0	35	99	100	0	20	15	0	22
Estonia	121	29	22	70	40	12	0	72	86	10	1	19	15	28	23
Eswatini	129	27	16	62	21	0	0	25	100	100	1	25	15	0	14
Ethiopia	97	32	42	48	0	12	20	21	73	100	5	30	30	27	22
Fiji	78	34	7	54	21	12	16	48	93	100	1	35	25	30	16
Finland	64	37	18	88	58	12	5	88	82	83	2	25	20	33	23
France	36	46	47	82	40	12	26	83	65	40	23	55	50	46	37
Gambia	42	45	16	59	4	0	50	12	100	100	6	50	100	33	23
Georgia	53	41	42	62	22	12	15	50	90	100	23	35	40	33	25
Germany	36	46	51	81	49	12	23	79	70	50	10	55	50	53	35
Ghana	78	34	28	49	47	0	15	19	87	100	9	30	30	33	22
Greece	78	34	38	73	37	12	15	65	81	77	16	20	25	13	29
Guam	86	33	16	61	64	0	0	32	100	100	0	25	15	33	16
Guatemala	129	27	8	47	7	0	0	35	100	100	1	18	15	17	19
Guinea-Bissau	64	37	20	52	3	0	30	12	100	100	6	44	40	33	22
Honduras	137	25	8	60	7	0	0	33	100	100	0	20	15	0	0
Hong Kong	30	54	23	96	32	58	13	87	100	83	5	55	30	80	37
Hungary	111	30	35	65	15	12	0	70	65	100	5	20	15	20	23
Iceland	100	31	10	74	0	12	3	84	96	77	1	15	15	33	22
India	53	41	50	71	16	12	16	46	43	100	23	43	50	48	38
Indonesia	4	73	30	69	46	53	80	38	100	100	18	95	100	100	61
Iran	8	68	49	53	31	12	58	52	100	100	57	85	100	93	35
Ireland	45	44	28	74	70	12	5	84	80	100	6	30	50	53	23
Italy	64	37	42	70	25	12	23	75	75	50	15	33	20	38	38
Jamaica	78	34	15	66	70	12	0	41	100	100	1	30	25	0	23
Japan	35	48	34	94	10	28	15	86	100	100	6	40	25	67	46
Jordan	10	67	63	68	95	12	50	42	100	100	29	80	100	81	38
Kazakhstan	24	58	39	60	25	12	40	52	100	83	35	81	90	60	30
Kenya	53	41	39	68	13	12	23	23	91	100	4	40	50	47	26
Kuwait	12	66	54	53	71	0	40	52	100	100	42	80	100	93	46

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Kyrgyzstan	27	56	35	46	17	12	50	37	100	100	42	75	90	50	28
Laos	129	27	18	56	16	12	0	14	99	100	1	21	15	0	14
Latvia	100	31	19	71	38	12	0	63	90	27	1	25	20	27	23
Lebanon	20	61	49	51	90	12	40	36	88	100	11	70	100	93	34
Lesotho	140	24	9	33	19	0	0	30	100	100	1	15	15	0	22
Lithuania	100	31	22	73	28	0	0	68	93	100	1	25	15	9	23
Luxembourg	86	33	26	83	56	0	5	79	89	100	2	25	20	0	22
Malawi	97	32	13	45	3	0	15	28	100	100	2	40	40	0	40
Malaysia	1	80	43	81	75	71	75	68	100	100	31	95	100	100	73
Maldives	20	61	36	62	57	23	51	30	100	100	3	84	100	67	45
Mali	36	46	19	53	12	0	50	19	97	100	7	64	90	33	22
Malta	64	37	16	68	63	12	0	66	97	100	2	35	20	17	23
Mauritius	63	38	12	72	13	12	16	59	100	100	2	38	30	27	27
Mexico	100	31	24	65	9	12	8	41	96	100	3	30	15	0	23
Mongolia	100	31	16	51	0	12	5	41	100	100	1	30	30	0	22
Montenegro	86	33	26	63	0	12	20	47	100	100	6	30	30	0	22
Morocco	12	66	41	74	63	12	58	50	100	67	42	77	100	87	53
Mozambique	73	35	13	41	14	0	15	16	100	100	1	40	40	33	24
Namibia	129	27	21	73	12	0	0	28	100	100	1	15	15	0	22
Nepal	121	29	37	45	25	0	15	31	83	100	2	25	25	0	22
Netherlands	48	43	40	96	67	12	24	88	75	50	6	49	50	14	26
New Zealand	57	40	5	74	69	28	13	86	78	83	2	52	25	17	24
Nicaragua	135	26	18	56	21	0	0	18	100	100	0	20	15	0	23
Nigeria	42	45	29	43	62	12	30	18	97	100	11	55	60	36	32
North Macedonia	73	35	27	56	1	12	30	45	90	83	6	40	40	13	22
Norway	97	32	23	76	63	12	15	81	70	43	3	25	30	0	23
Oman	10	67	60	82	72	12	50	60	100	100	7	80	100	100	47
Pakistan	17	64	49	62	53	12	66	31	98	100	8	90	100	93	36
Panama	121	29	15	79	10	0	3	49	100	100	1	25	15	0	23
Paraguay	135	26	15	47	7	0	0	43	100	100	0	20	15	0	9
Peru	121	29	8	56	7	12	0	51	100	100	1	24	15	0	24
Philippines	36	46	32	57	42	33	30	38	93	100	3	47	50	40	32
Poland	100	31	35	68	29	12	3	62	64	100	5	25	15	22	23
Portugal	70	36	16	80	20	12	3	73	97	100	4	30	20	20	29
Puerto Rico	100	31	17	68	34	0	0	66	100	100	0	25	20	0	23
Qatar	6	69	69	83	70	12	48	62	100	100	4	90	100	100	53

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			Connectivity	Transport Infrastructure	Communication Proficiency	Destination Marketing	Stakeholder Awareness	Enabling Climate	Safety	Faith Restrictions	Visitor Arrivals	Halal Dining	Prayer Places	Airports	Accommodation
Romania	100	31	31	57	23	12	0	63	92	100	2	25	15	4	23
Russia	53	41	43	66	23	12	23	61	84	83	24	40	25	37	32
Rwanda	86	33	19	69	11	0	5	35	95	100	2	40	40	0	22
Saudi Arabia	3	76	69	79	66	12	58	57	96	100	66	95	100	100	64
Senegal	31	52	21	63	26	0	50	39	100	100	3	65	100	53	27
Serbia	86	33	40	57	35	12	15	59	95	100	4	35	15	0	0
Sierra Leone	34	49	20	53	59	0	40	19	100	100	4	60	80	60	24
Singapore	6	69	31	99	68	63	41	92	100	100	22	90	70	67	34
Slovakia	111	30	15	59	20	12	0	68	82	77	1	25	15	20	23
Slovenia	100	31	22	69	47	0	5	69	97	67	2	30	15	0	23
South Africa	32	51	21	73	22	38	36	51	80	100	3	60	60	67	34
South Korea	45	44	28	89	14	36	15	80	97	100	6	42	15	43	26
Spain	48	43	39	85	20	22	20	81	78	50	26	50	25	33	39
Sri Lanka	60	39	37	64	43	12	15	29	67	50	4	51	60	31	42
Sudan	22	60	36	67	63	0	50	20	96	100	20	90	100	60	40
Suriname	86	33	5	52	61	0	15	31	100	100	1	24	15	33	32
Sweden	73	35	22	81	58	12	15	89	73	67	3	32	25	9	22
Switzerland	60	39	36	94	50	12	15	80	59	0	5	55	50	30	29
Taiwan	25	57	29	84	28	71	30	58	99	100	4	60	50	63	63
Tajikistan	32	51	25	67	21	0	50	24	100	50	18	70	90	60	34
Tanzania	50	42	28	61	20	12	20	15	97	100	3	60	60	17	34
Thailand	29	55	30	69	21	45	30	55	87	100	23	55	50	87	41
Togo	78	34	17	52	14	0	15	19	100	100	6	25	40	33	22
Tunisia	18	62	37	54	90	12	51	56	97	67	43	80	100	50	35
Turkey	2	77	72	76	25	43	75	61	100	100	88	80	100	87	59
Uganda	73	35	19	52	6	0	15	21	100	100	3	25	40	53	17
Ukraine	86	33	40	54	17	12	5	44	93	100	5	30	15	15	23
United Arab Emirates	5	72	78	88	85	12	41	66	100	100	29	80	100	100	67
United Kingdom	25	57	45	76	72	12	34	92	71	100	14	70	70	61	46
United States of America	36	46	30	85	68	12	26	83	72	100	13	55	35	37	30
Uruguay	127	28	4	63	17	0	0	62	100	100	1	19	15	0	23
Uzbekistan	16	65	39	74	26	43	65	41	100	100	35	75	90	80	34
Vietnam	78	34	19	56	14	12	0	47	100	100	5	30	20	26	31
Zambia	127	28	17	55	11	0	3	19	100	100	2	20	20	13	22
Zimbabwe	111	30	17	46	57	0	5	15	100	100	2	30	25	0	14

SPECIAL SUPPLEMENT
**TRAVEL BUBBLES AND CORRIDORS
ECOSYSTEM**

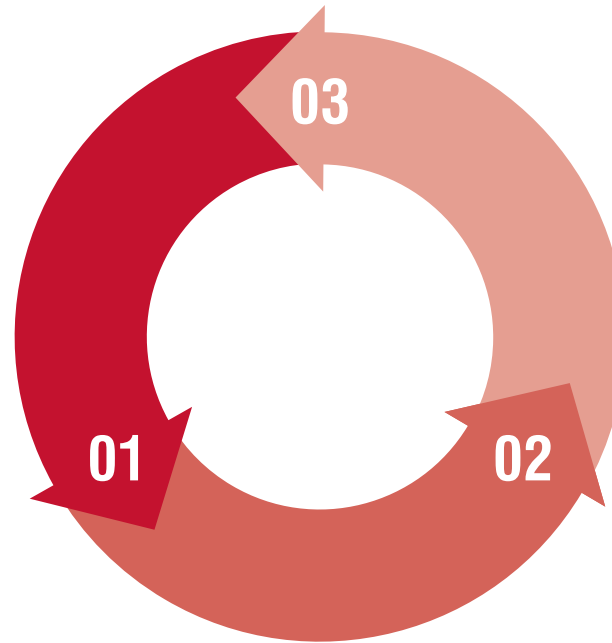


MAPPING OF POTENTIAL TRAVEL BUBBLES AND CORRIDORS

In the immediate future, travel will be managed and regulated between destinations that are COVID safe. Travel bubbles will first be established between two destinations before expanding to travel corridors with a third destination or more. This is a proposed model to assess destinations that can be mapped to one another for accelerating the growth of Muslim travelers. These three key iterative steps of the model could unlock a number of opportunities for destinations.

01 IDENTIFY THE TOP MARKETS

Evaluate the top Muslim inbound and outbound markets and their ability to cater to the faith-based service needs of Muslim travelers using the latest Global Muslim Travel Index (GMTI).



03 MATCH & MONITOR

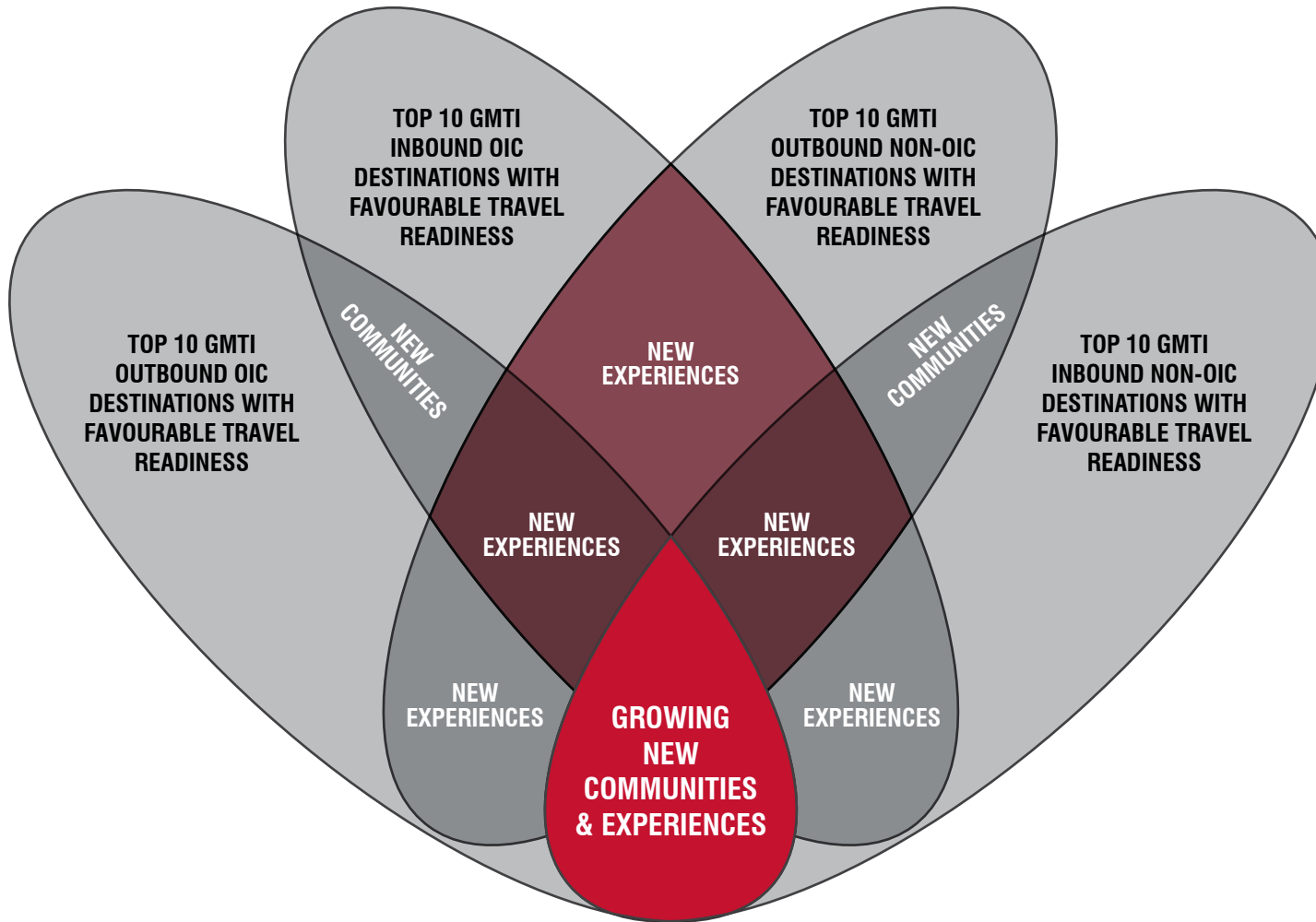
Destinations which score favourably based on GMTI x Travel Readiness are matched based on tourism economics of demand supply, feasibility, proximity and overall value. Scores are monitored and updated to account for emerging COVID-19 updates of each destination.

02 EVALUATE TRAVEL READINESS

GMTI scores of top destinations are factored against their level of travel readiness to effectively adapt and manage COVID-19..

GROWING NEW COMMUNITIES AND EXPERIENCES

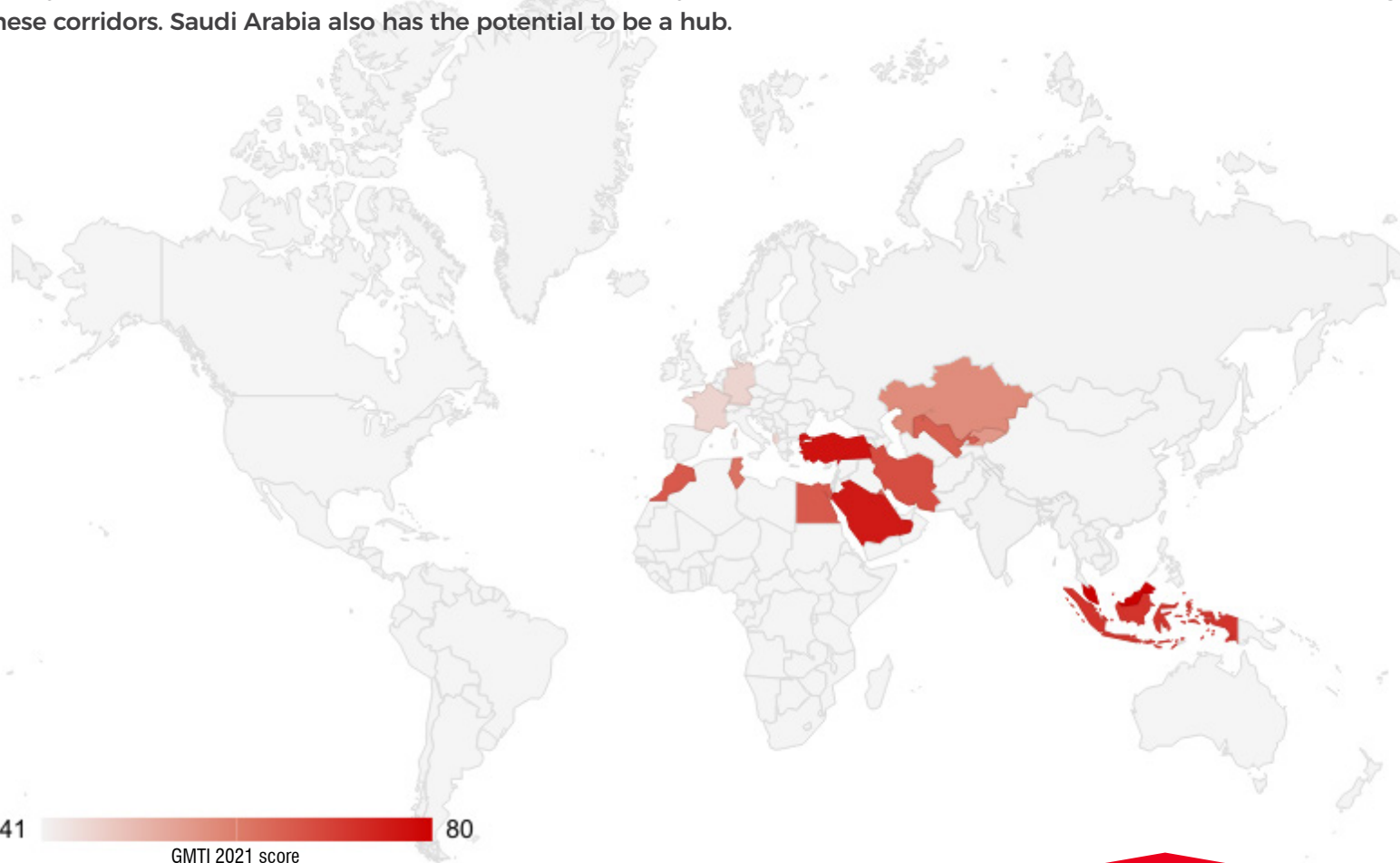
Top OIC destinations which score favourably in their level of travel readiness against COVID-19 have the potential to form unique travel bubbles and build new communities between Muslim travelers from both regions. There is also more potential to build new travel experiences between OIC and non-OIC destinations which are ready to welcome travelers.



DESTINATIONS WITH MORE THAN 2 MILLION INBOUND & 2 MILLION OUTBOUND MUSLIM TRAVELERS

Based on 2019 data, 20 destinations have a minimum of 2 million Muslim inbound arrivals and 2 million Muslim outbound departures. Most of these destinations also are ranked high in the GMTI 2021. As borders reopen, these destinations could look at developing corridors/bubbles to accelerate the recovery of Muslim traveler arrivals.

Turkey and the United Arab Emirates, with the connectivity of Turkish Airlines and Emirates, could be hubs connecting these corridors. Saudi Arabia also has the potential to be a hub.



GMTI 2021 Score	
Saudi Arabia	76
United Arab Emirates	72
Turkey	77
Kuwait	66
Indonesia	73
Egypt	66
Malaysia	80
Iran	68
Uzbekistan	65
Kazakhstan	58
Germany	46
United Kingdom (UK)	57
Albania	46
Kyrgyzstan	56
Russia	41
India	41
Tunisia	62
France	46
Morocco	66
Bahrain	68

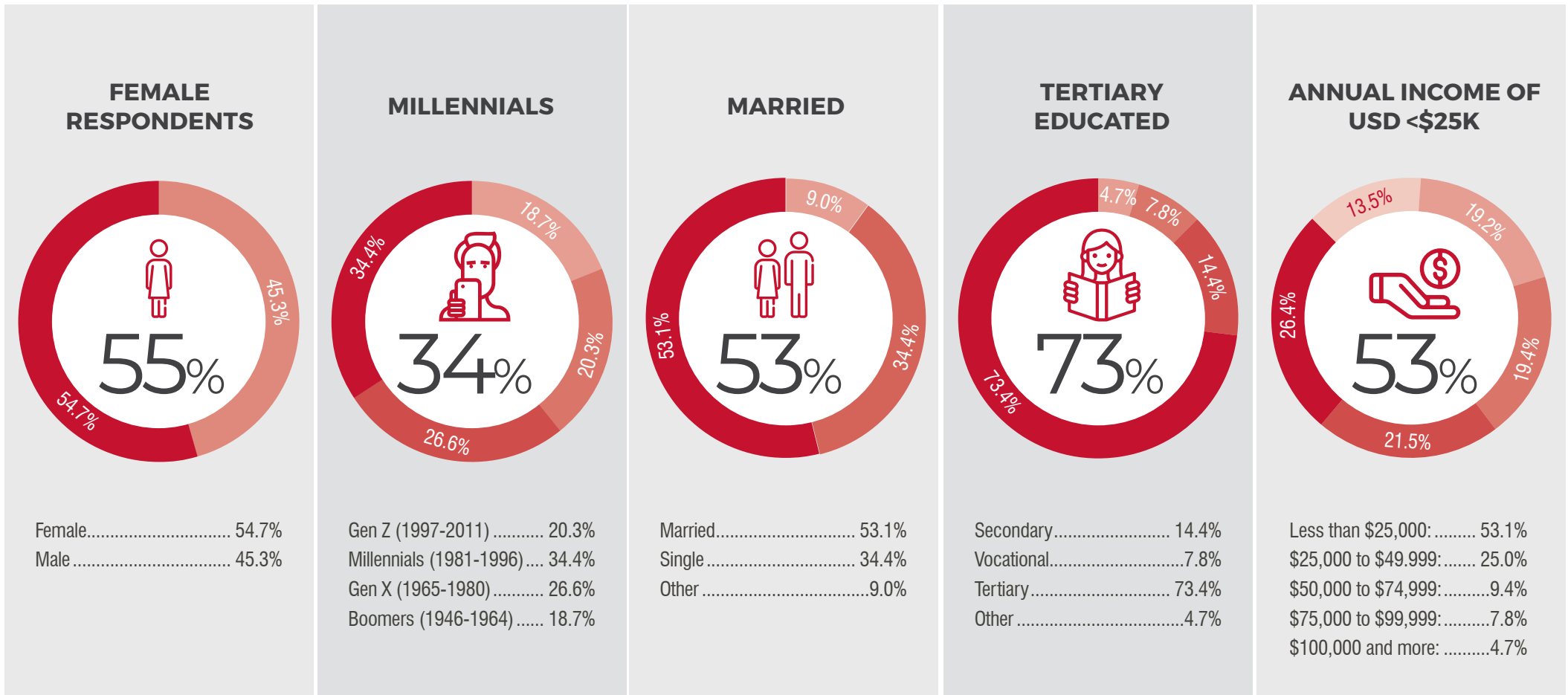
SPECIAL SUPPLEMENT
**RELOOKING CONSUMER
TRAVEL AND LIFESTYLES**

IMPACT ON FAITH-BASED NEEDS



IMPACT OF COVID-19 ON TRAVEL & CONSUMER LIFESTYLES

For almost two years, COVID-19 has affected the lives of Muslims in travel and beyond. To better understand its wide-reaching implications, CrescentRating conducted a survey over a two-month period. Findings from the responses are detailed in this section.



IMPACT OF COVID-19 ON FAITH-BASED SERVICE NEEDS OF MUSLIM TRAVELERS

Muslim travelers have several faith-based needs which vary in their level of importance. These needs are prioritized under “Need to have”, “Good to have” and “Nice to have”:

Need to have: Halal food, prayer facilities, water-friendly washrooms, and safety and security with no islamophobia.

Good to have: social causes, Ramadan experiences and local Muslim experiences such as heritage sites and interacting with Muslim community.

Nice to have: recreational spaces with privacy and no non-Halal activities including alcohol, discotheques or gambling resort in vicinity.

For our study, respondents were asked to rate the importance of each faith-based service need during two periods: “Before COVID-19” and “At this time”.

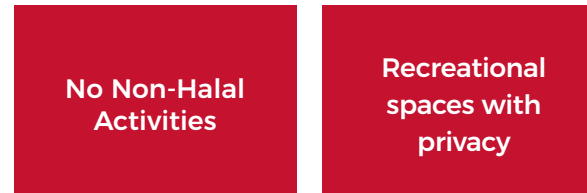
NEED TO HAVE



GOOD TO HAVE

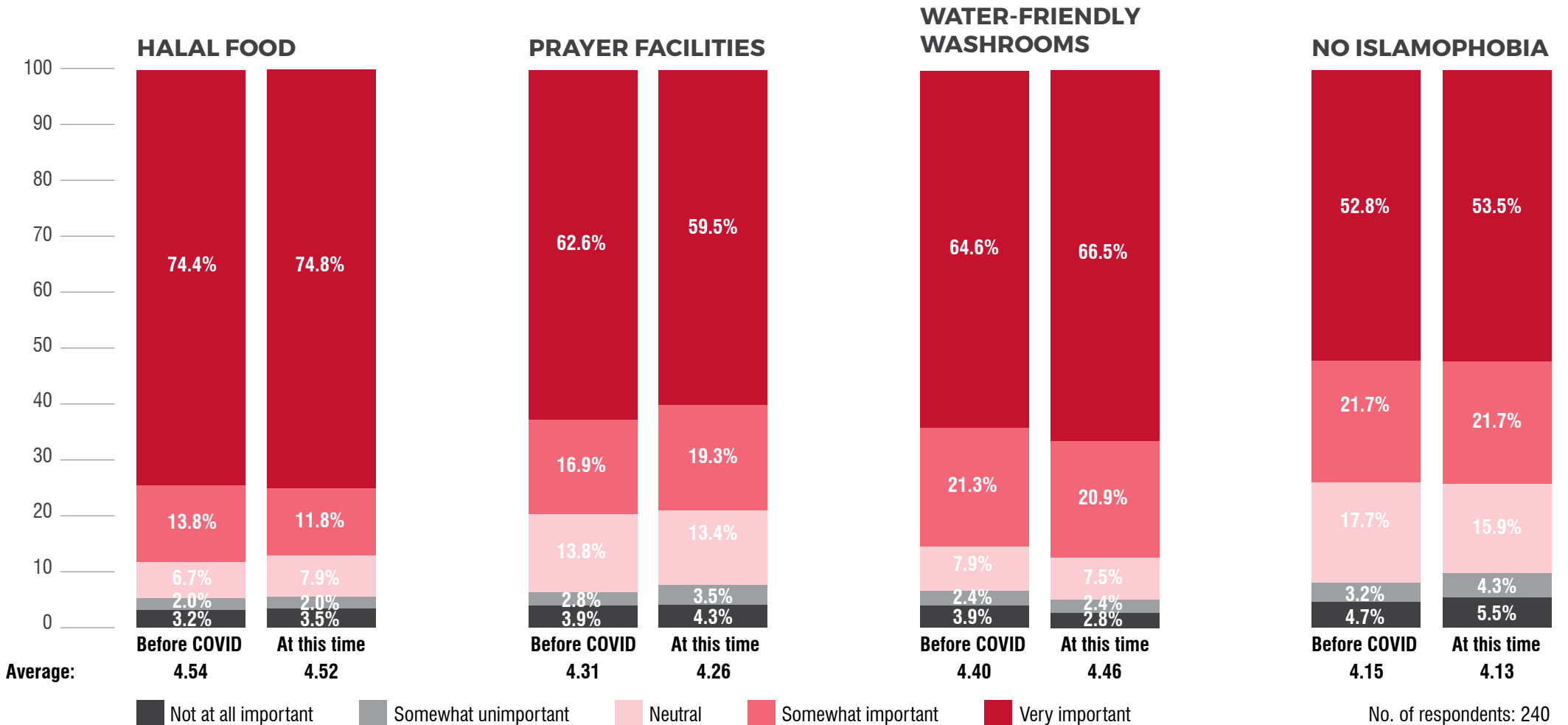


NICE TO HAVE



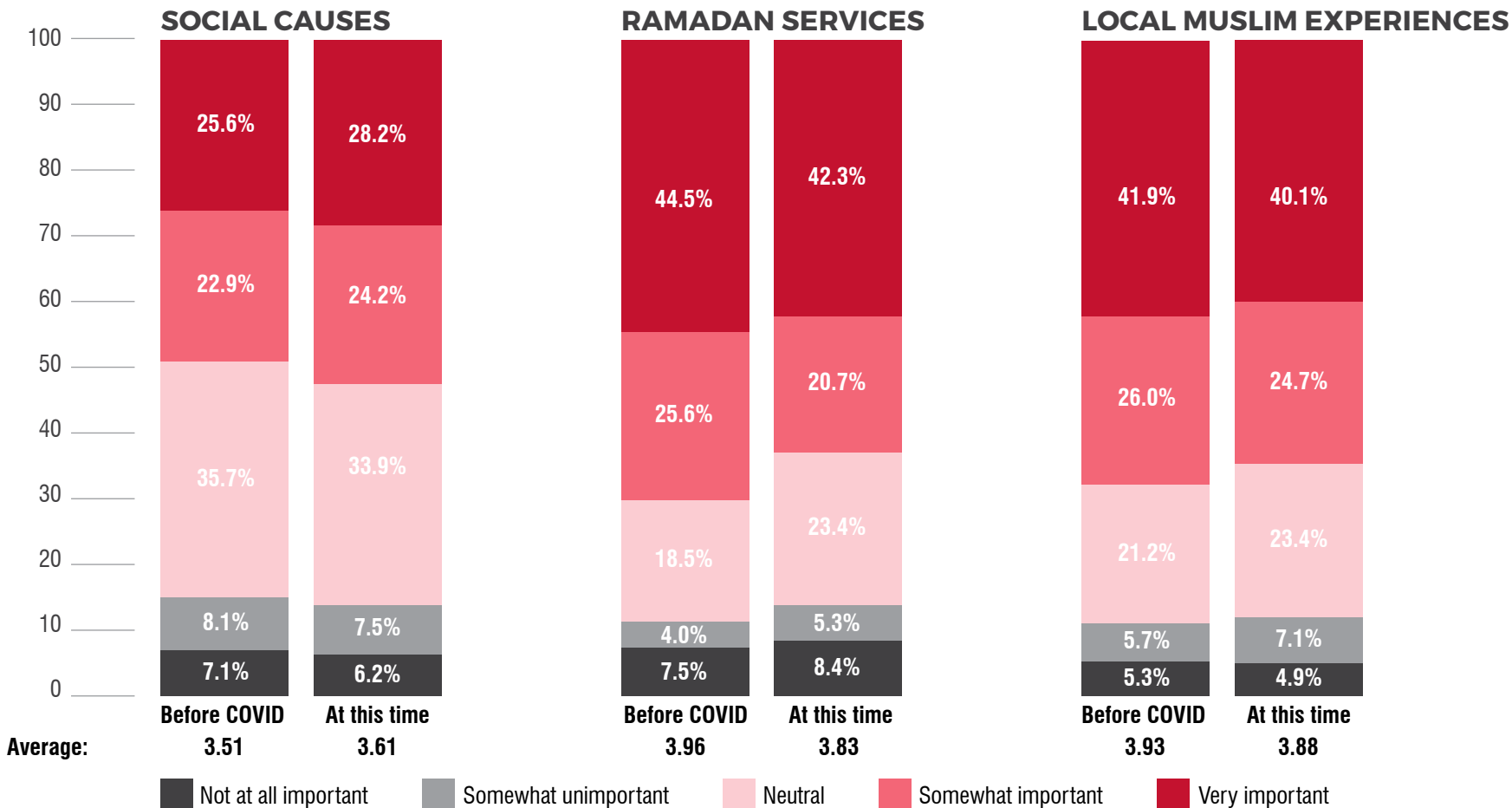
IMPACT OF COVID-19 ON NEED-TO-HAVE SERVICES FOR MUSLIM TRAVELERS

With high average scores across all categories, overall survey responses signalled that Muslim travelers still regarded Need-to-Have services as being essential. The scores for water-friendly washrooms increased, while prayer facilities reduced in its average score of importance. This reflects the changing environment and the adaptability of Muslims to continue praying at home despite having less common prayer spaces and facilities to ensure the safety of all.



IMPACT OF COVID-19 ON GOOD-TO-HAVE SERVICES FOR MUSLIM TRAVELERS

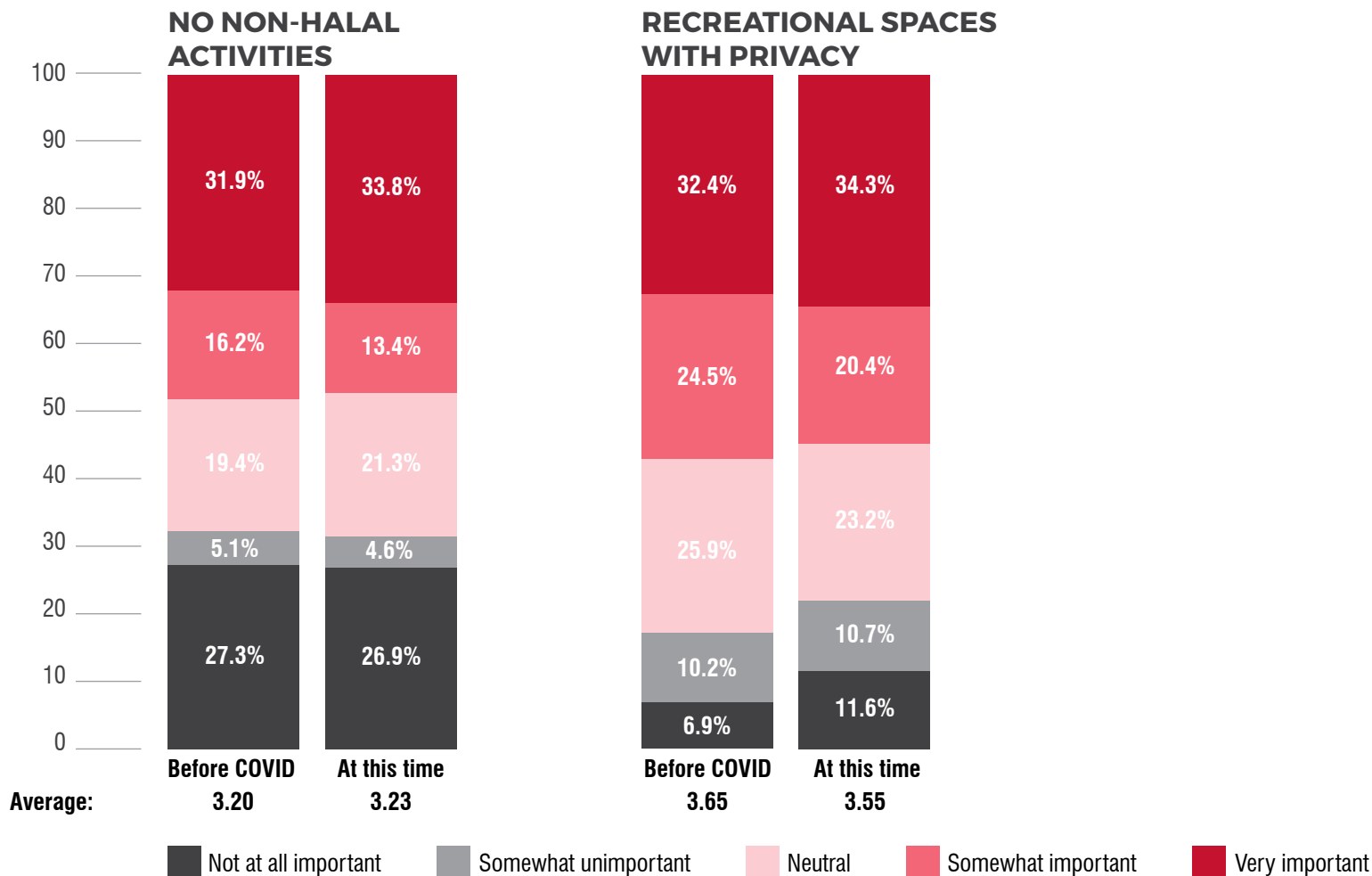
Overall scores across categories in the Good-to-Have services indicate that Muslim travelers continue to view these factors with a medium-level of importance. While Ramadan services and local Muslim experiences scored lower in terms of their level of importance during COVID-19, Muslims are looking for more social causes in the current environment as compared to the past. This is significant despite the fact that events associated with social causes, Ramadan services and local Muslim experiences may all face similar challenges. However, the findings show that Muslims are continuing and increasing expectations for social causes.



No. of respondents: 230

IMPACT OF COVID-19 ON NICE-TO-HAVE SERVICES FOR MUSLIM TRAVELERS

Overall scores for categories under the Nice-to-Have services remained low in terms of their level of importance with Muslim travelers. In addition, lesser importance has been placed for both no non-Halal activities and recreational spaces with privacy during the COVID-19 pandemic. A possible conclusion to this is that Muslims have set lesser focus and priorities on these factors which themselves cannot be actualized given the current situation.



No. of respondents: 220

IMPACT OF COVID-19 ON NEED FOR SERVICE TOUCHPOINTS TO HAVE MUSLIM-FRIENDLY SERVICES

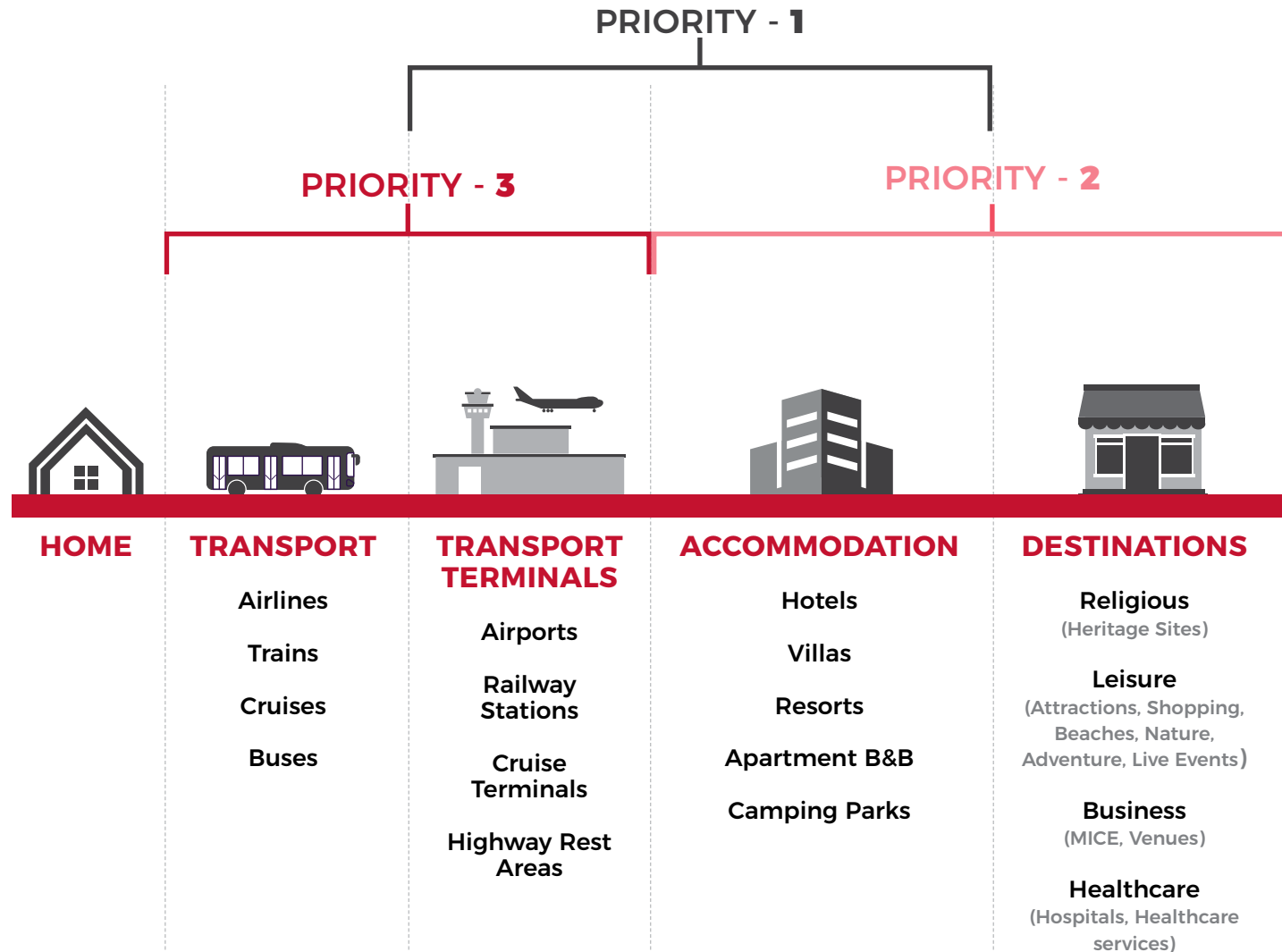
The CrescentRating Halal Friendly Travel (CRAHFT) tool has assisted destinations to prioritize key touchpoints for Muslim-friendly services. This tool maps the Muslim traveler journey along key service segments against the level of importance they place when it comes to providing Muslim-friendly services:

Priority 1 includes airports and hotels.

Priority 2 includes event venues, shopping malls and attractions.

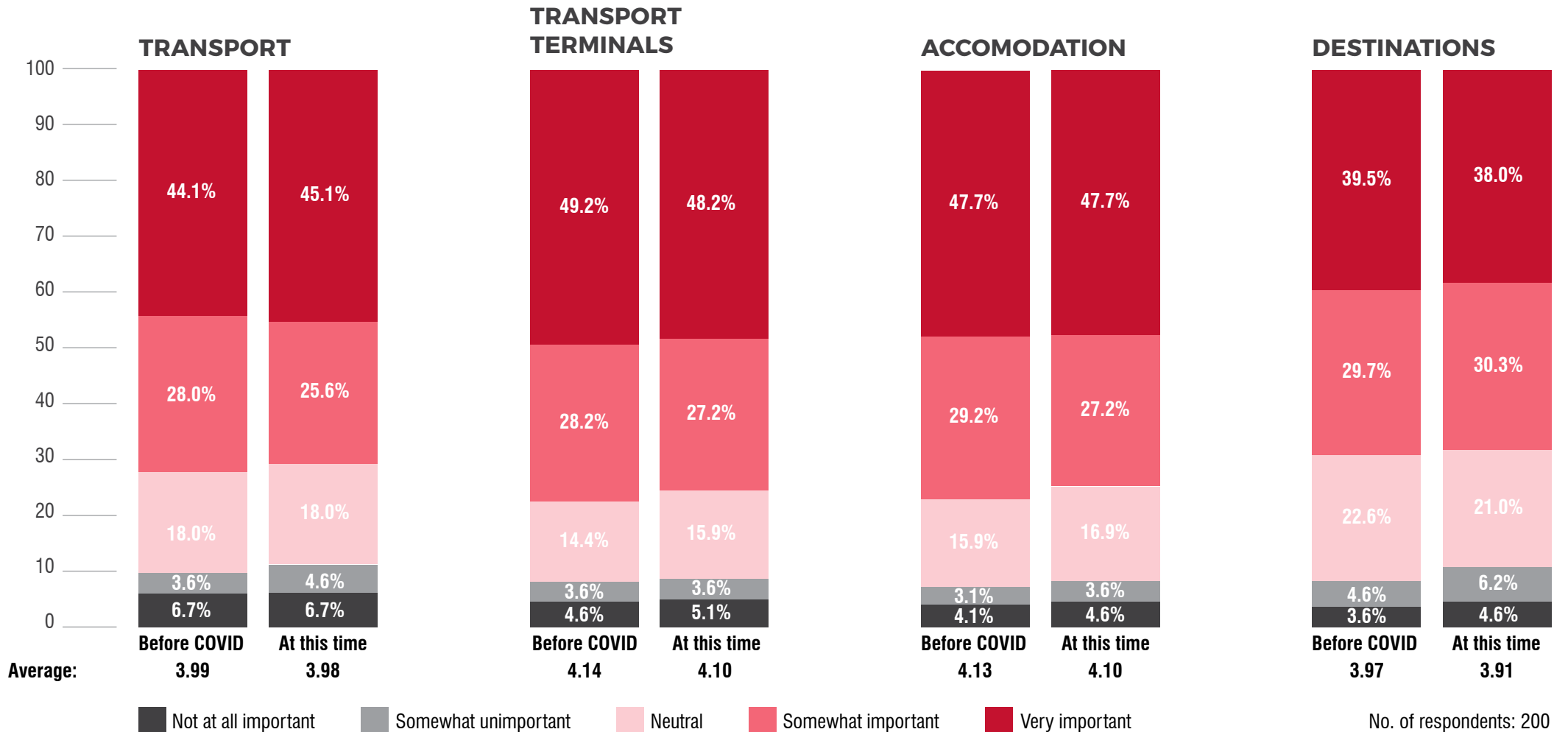
Priority 3 includes highway rest areas, planes and railway stations.

For our study, respondents were asked to rate the importance of each service touchpoint having Muslim-friendly services (e.g. Halal food, prayer facilities, water-friendly washrooms) during two periods: "Before COVID-19" and "At this time".



IMPACT OF COVID-19 ON NEED FOR SERVICE TOUCHPOINTS TO HAVE MUSLIM-FRIENDLY SERVICES

Overall average scores for the need of transport and accomodation to have Muslim-friendly services remained the same. In the current COVID environment, both transport and accomodation continue to be important and relevant for Muslims, while transport terminals and destinations become inaccessible or function primarily as a mode of rapid transit.



SPECIAL SUPPLEMENT
**RELOOKING CONSUMER
TRAVEL AND LIFESTYLES**

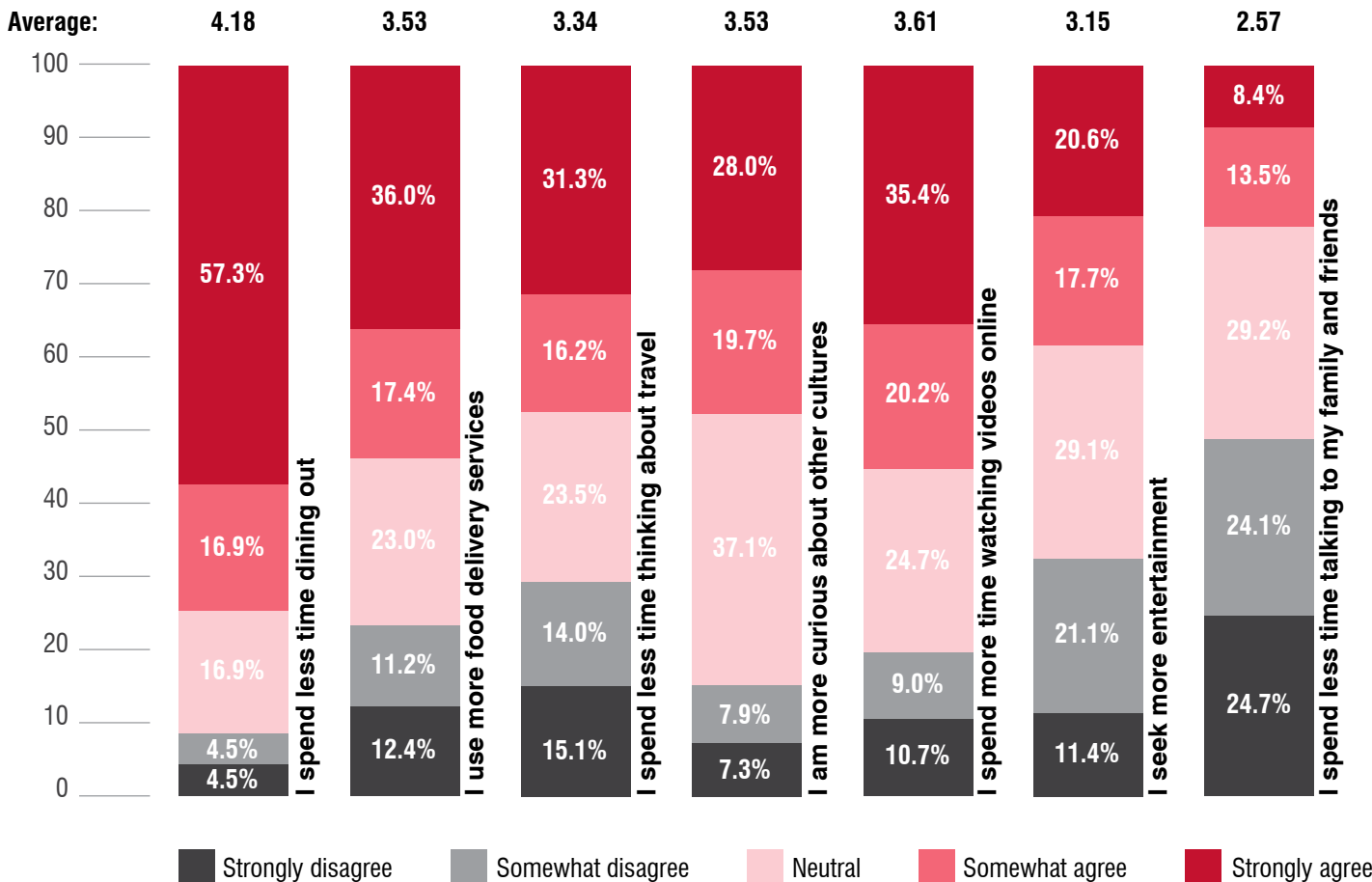
IMPACT ON ATTITUDES & LIFESTYLES



Photo Credit: Zalora

IMPACT OF COVID-19 ON ATTITUDES AND LIFESTYLE: DINING, TRAVEL, ENTERTAINMENT, SOCIALIZING

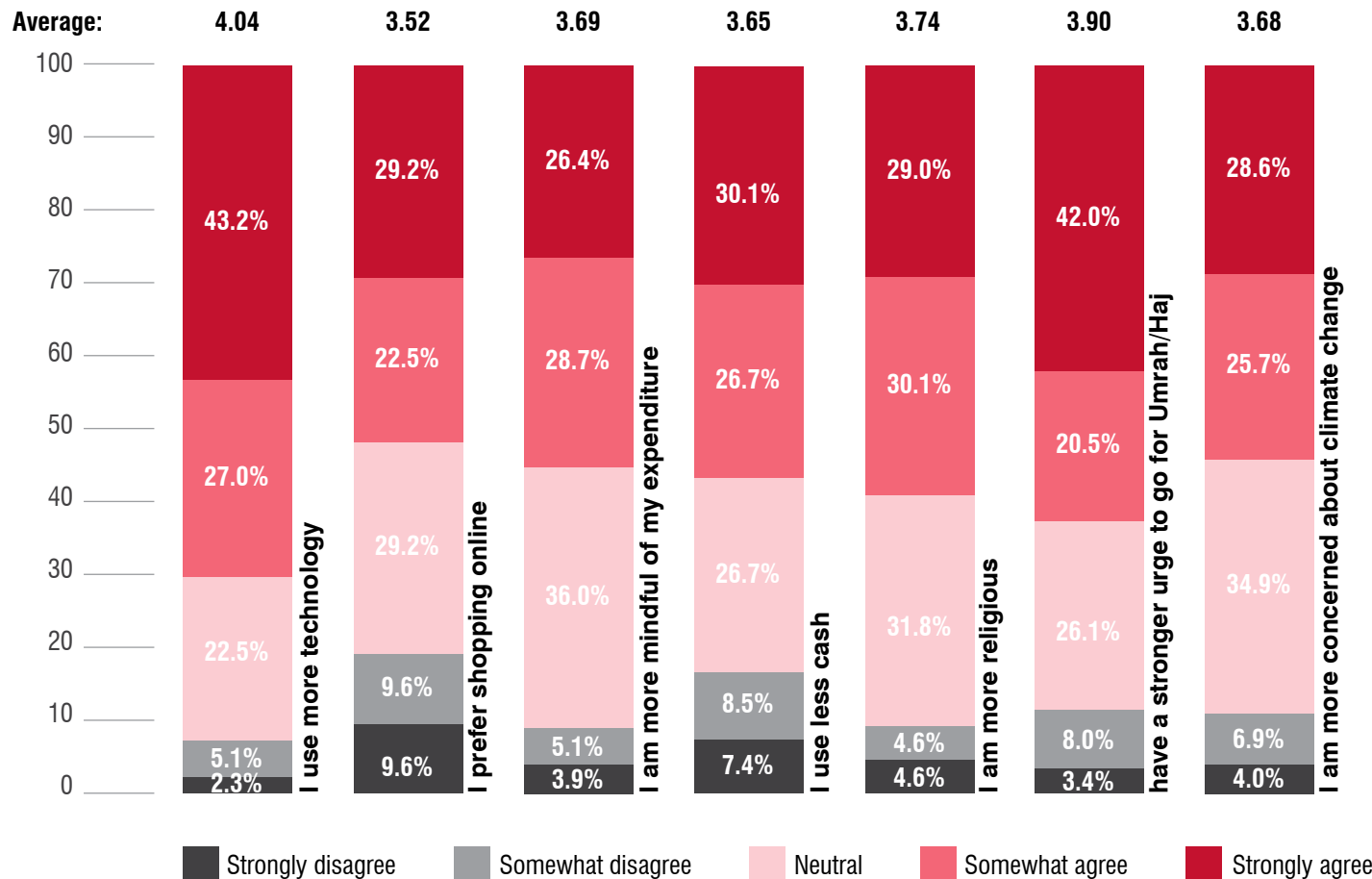
Overall, based on the study's expectations, dining, travel and entertainment lifestyles and behaviours changed. Muslims agree that since COVID-19, they spend less time dining out and use more food delivery services. While they also spend less time thinking about travel, they are now more curious about other cultures. In terms of entertainment, they seek more entertainment and watch more videos online during the pandemic. In a further positive outcome, despite COVID-19, respondents somewhat disagreed that they spend less time talking to their family and friends. This signals the importance of technology in helping their social well-being.



No. of respondents: 180

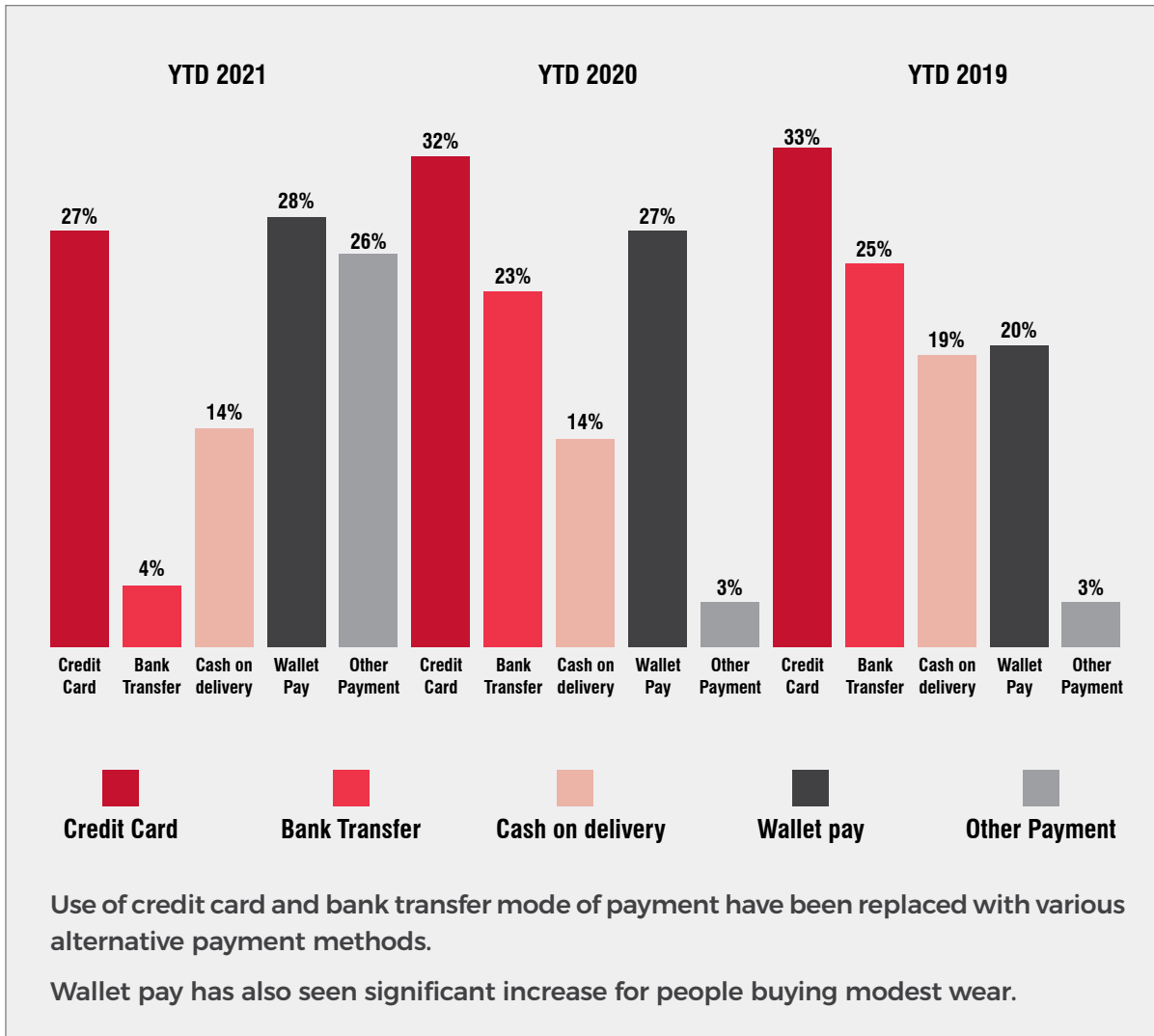
IMPACT OF COVID-19 ON ATTITUDES AND LIFESTYLE: TECH, SHOPPING, HIGHER CAUSES

Technology continues to play a key role in helping Muslims adapt to the COVID-19 environment. They continue to use more technology including for online retailing. They are also more mindful of their spending habits and use less cash. Their attitudes towards higher causes including religious events and climate change also heightened since the COVID-19 pandemic.



No. of respondents: 180

IMPACT OF COVID-19 ON ONLINE SALES AND PAYMENT METHODS FOR YEAR 2021: INSIGHTS FROM ZALORA




Compared to 2019, consumers spending on more affordable items, causing a drop of

- 15 % in basket value
- 12% in number of basket items

Demand for products in price range 15-29 and 30-44 had increased by 10-15%


400% increase in sales compared to 2019

IMPACT OF COVID-19 ON ONLINE PURCHASING TRENDS FOR YEAR 2021: INSIGHTS FROM ZALORA



Mobile Web

VS



Mobile App

Compared to 2019:

- Use of phone for purchase has increased by almost 8%
- Majority of customers use the Zalora app to make their purchases.
- use of the mobile application has increased by 13%
- use of the mobile site has dropped by 7%



Increase in demand for darker colour clothes compared to lighter colours




Share of sales in modest wear relative to other categories has decreased by

- 50% Compared to 2019
- 30% Compared to 2020

Share of sales in sports wear relative to other categories has increased by

- 50% compared to 2019
- 25% compared to 2020

DATA SOURCES AND ACKNOWLEDGEMENTS





DATA SOURCES

CrescentRating Market Analytics Performance Solutions (CR MAPS)
maps.crescentrating.com

HalalTrip
HalalTrip.com

Mastercard-CrescentRating reports
www.crescentrating.com/halal-muslim-travel-market-reports.html

Coronavirus Government Response Tracker (OxCGRT)
covidtracker.bsg.ox.ac.uk/

The Global Innovation Index
www.globalinnovationindex.org

The Travel & Tourism Competitiveness Report
www.weforum.org

United Nations World Tourism Organization - UNWTO
www2.unwto.org

World Travel and Tourism Council
www.wttc.org

ZALORA Trender
zalora.com

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Research Team:

Fazal Bahardeen
Maryam Mohammad
Nurhafihz Noor
Inbanathan Vaishnavi

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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.

www.crescentrating.com



HalalTrip's vision is to be the trusted global online platform, catering for Muslim travelers to make inspired and educated travel choices. It is the most comprehensive and innovative platform with its next generation mobile app.

It aims to make destination discovery and trip planning fun and more intuitive for those looking for a Halal-friendly travel experience.

www.halaltrip.com

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A comprehensive database features the latest worldwide trends and developments in the global Muslim market.

Gain access into our extensive database to explore and obtain insights from a multitude of information about the Muslim market at a global, regional and country level.

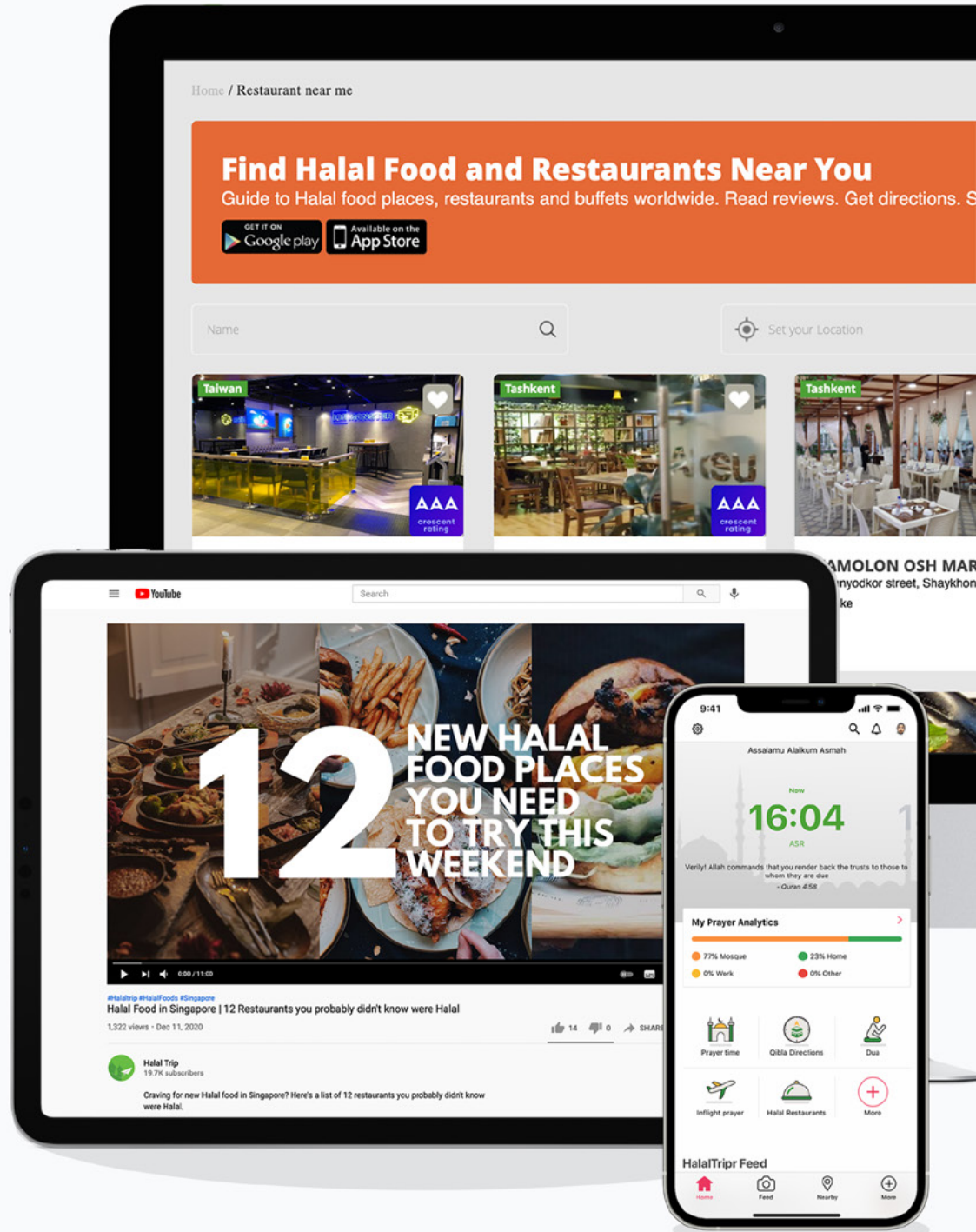


Contact us at info@crescentrating.com for more information



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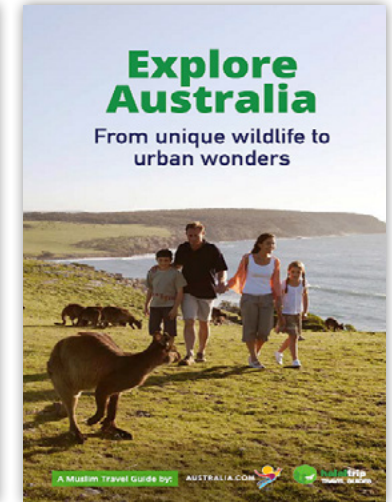
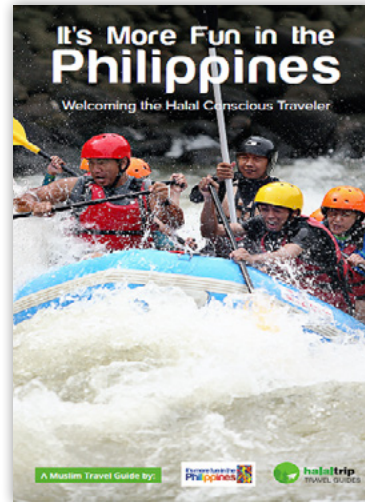
A SUPPLEMENT TO YOUR MUSLIM VISITOR
GUIDE TO SINGAPORE 2021



Downloadable Muslim Visitor Guides in partnership with Destinations

Access the latest Downloadable Muslim Visitor Guides on HalalTrip mobile app or halaltrip.com

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rating

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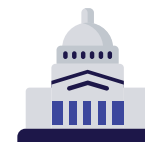


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Travel Agents



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Travel Associations



Convention Venues



Attractions



Shopping Malls



Hospitals

Talk with our Experts...



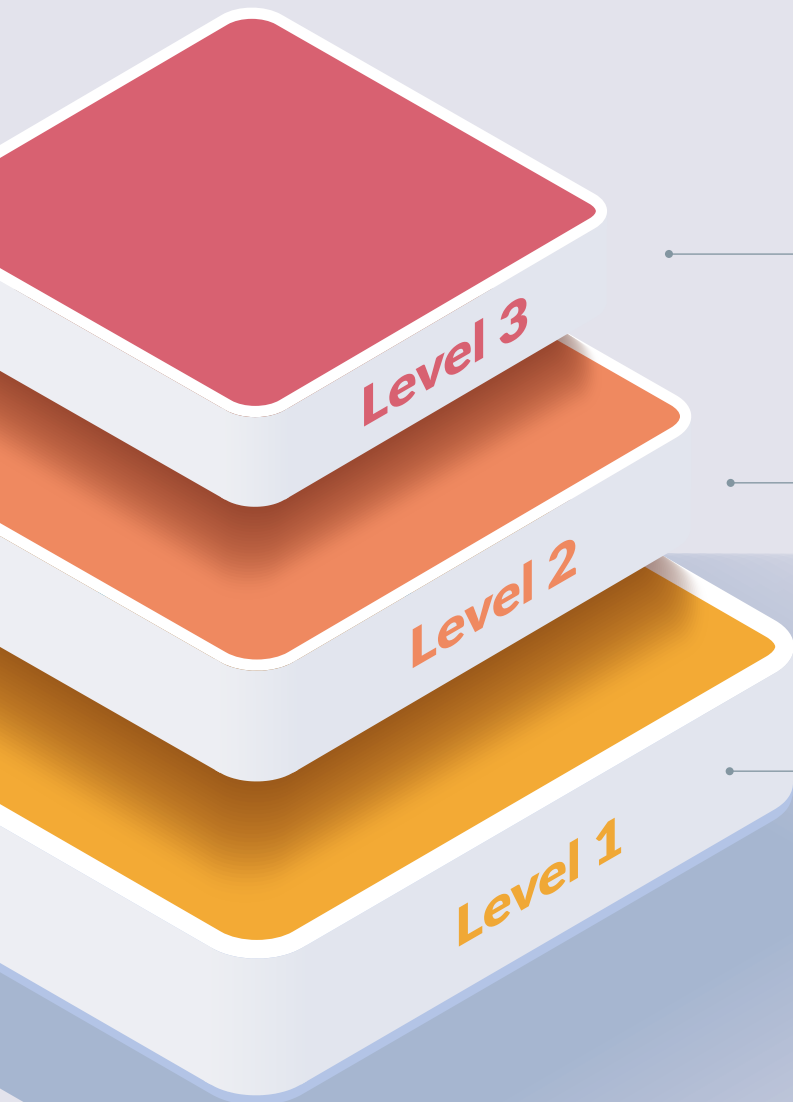
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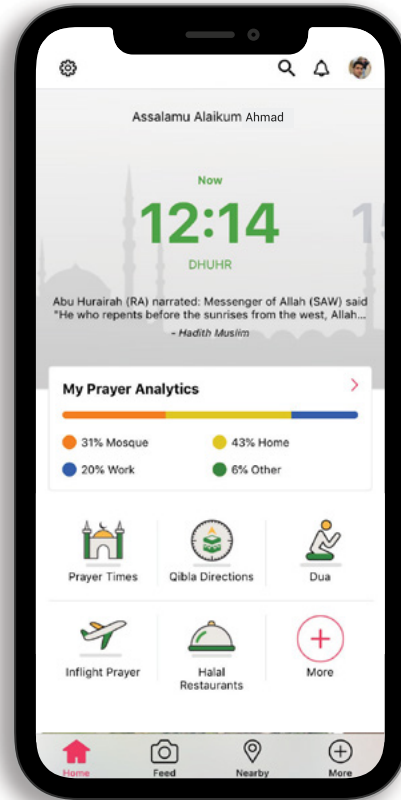
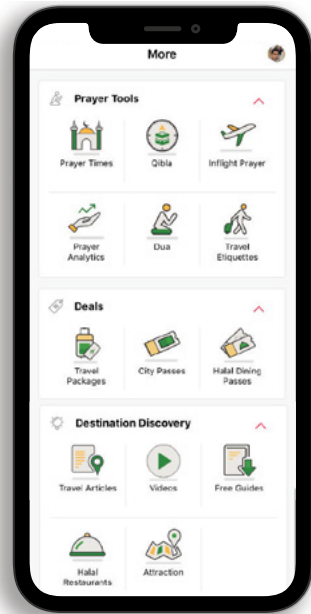
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online | learning | certification

Gain a fundamental understanding of the Halal travel market with our comprehensive online learning program and certification.



Get inspired • Go • Inspire others
Every Muslim's Lifestyle App

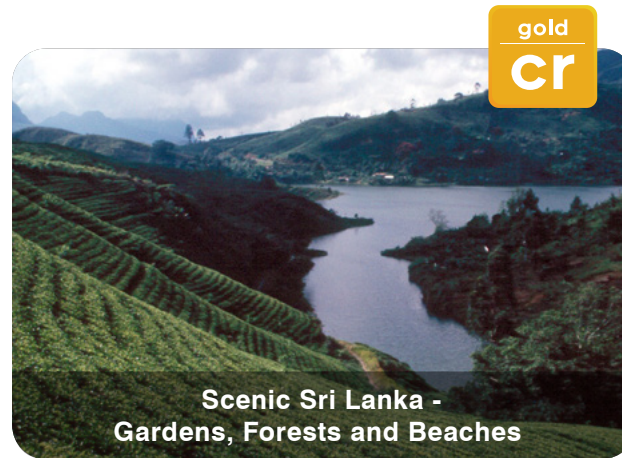


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get inspired

go

inspire others



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Prayer Analytics

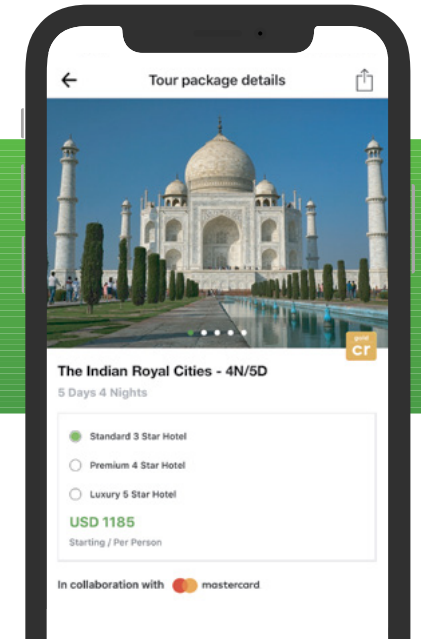
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CrescentRating Pte. Ltd.

80 Changi Road,
#05-12 Centropod Singapore, 419715

Tel: +65 6702 4098

Email: info@crescentrating.com

Web: www.crescentrating.com



Mastercard Asia/Pacific Pte Ltd

3 Fraser Street | DUO Tower
Level 17 | Singapore 189352

Tel +65 6390 6576

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