



CrescentRating, Bank Indonesia & Perkumpulan Pariwisata Halal Indonesia

INDONESIA

Muslim Travel Index (Extract)

October 2023

#IMTI2023



IMTI and the Domestic ACES Model: Benchmarking Indonesia’s Provinces

The Indonesia Muslim Travel Index (IMTI), first inaugurated in 2018 with a subsequent edition in 2019, embarks on its third iteration this year, continuing its mission to analyze and elevate Indonesia’s readiness to host tourists, especially those of the Muslim community. The IMTI serves as a tool to evaluate each province’s capability to accommodate Muslim travelers, focusing not only on the availability of Halal options but also on the overall receptivity and inclusiveness of the environment, thereby aiming to boost the Destination and Industry Competitiveness Index. By doing so, it seeks to tap into the vast possibilities of Halal tourism as a significant catalyst for Indonesia’s economic enhancement and diversification.

The IMTI leverages the structured approach of the “CrescentRating ACES model,” a robust framework established in the Mastercard-CrescentRating Global Muslim Travel Index (GMTI) report. This model is a comprehensive guide for destinations aiming to enhance their appeal to Muslim travelers by focusing on four pivotal domains:

Access: It assesses the ease of Access to and within the province. It has a weightage of 10%

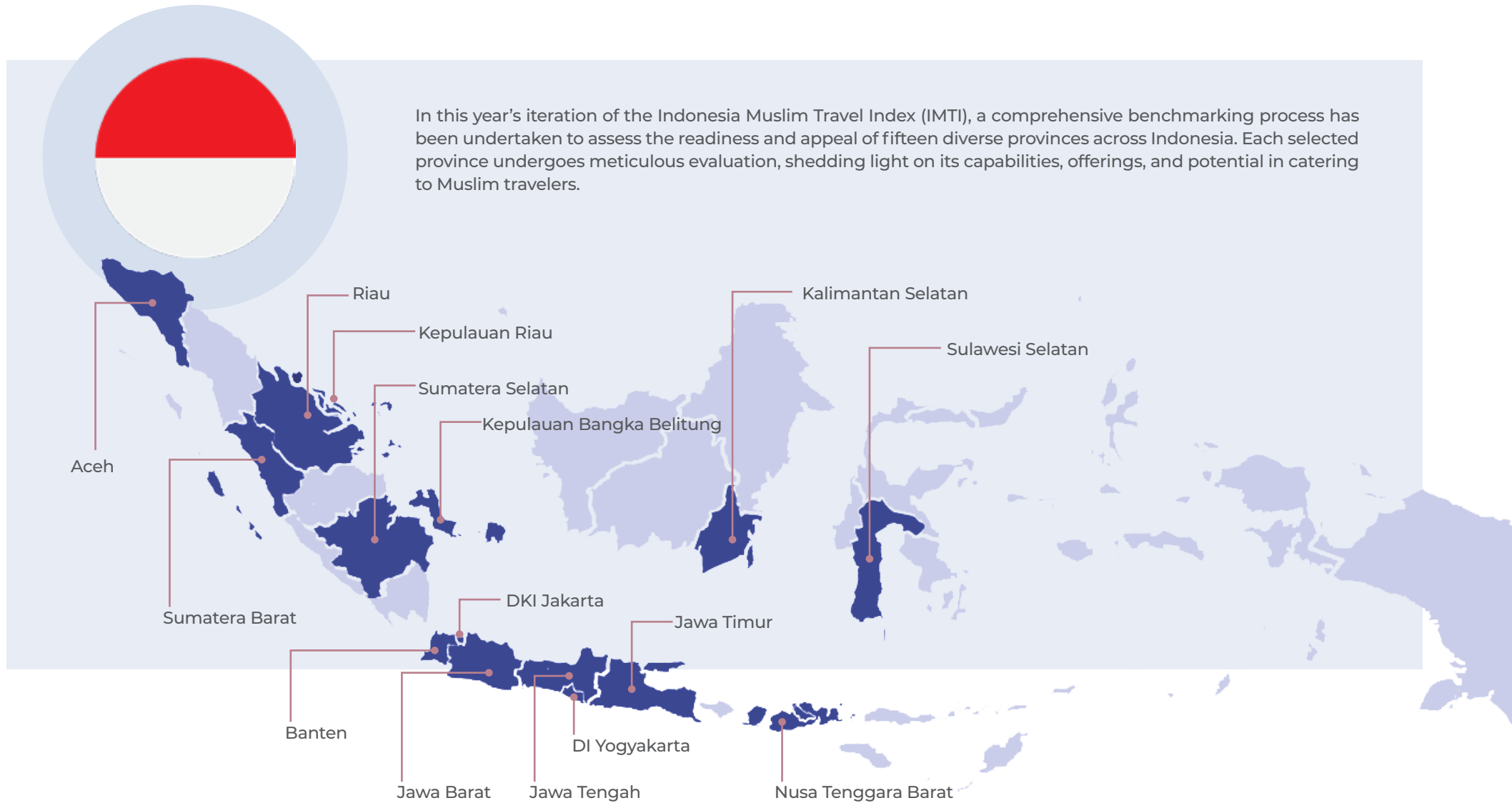
Communication: It assesses the effectiveness of internal and external communication by the provinces. It has a weightage of 20%.

Environment: It evaluates the overall environment in the provinces. It has a weightage of 30%.

Services: It reviews the array of services provided by the provinces. It has a weightage of 40%.



Under the Lens: Benchmarking in IMTI 2023



IMTI 2023 Rankings

The results from the Indonesia Muslim Travel Index (IMTI) 2023 shed light on the provinces that have successfully positioned themselves as premier destinations for Muslim tourists. Topping the list is Nusa Tenggara Barat with a commendable score of 67, followed closely by Aceh, Sumatera Barat, DKI Jakarta, and Jawa Tengah. These regions stand out not merely for their provision of Halal options but for creating a holistic travel environment that addresses different facets of the Muslim traveler's needs.

The success of these provinces can be attributed to their commitment to creating a comprehensive and inclusive travel experience. Their robust communication strategies ensure that their unique offerings are not only well-articulated but also effectively reach their intended audience. Furthermore, the investment in infrastructure, such as road networks and transportation services, has played a pivotal role in ensuring easy accessibility for visitors. The emphasis on creating a receptive and inclusive environment, complemented by a wide array of services tailored to Muslim travelers, has made them the benchmark in Halal tourism in Indonesia.

While some provinces are leading in terms of readiness and offerings, others have room for growth. The variation in scores underscores the importance of tailored strategies to boost each province's appeal. By focusing on the key domains of Access, Communication, Environment, and Services, and drawing insights from the other regions, there's an opportunity to further elevate Indonesia's status on the global Halal tourism stage, ensuring the nation as a whole remains an attractive and inclusive destination for Muslim travelers.

Province	IMTI 2023 Score	IMTI 2023 Rank
Nusa Tenggara Barat	67	1
Aceh	63	2
Sumatera Barat	62	3
DKI Jakarta	60	4
Jawa Tengah	59	5
Jawa Barat	56	6
DI Yogyakarta	53	7
Jawa Timur	52	8
Sulawesi Selatan	51	9
Kalimantan Selatan	49	10
Riau	48	11
Kepulauan Riau	43	12
Kepulauan Bangka Belitung	42	13
Banten	41	14
Sumatera Selatan	34	15

IMTI 2023 ACES Rankings - Access

The Access scores from the Indonesia Muslim Travel Index (IMTI) 2023 highlight the provinces that are most easily accessible and convenient for travelers. Leading the pack is DKI Jakarta with a score of 83, followed by Kepulauan Riau and Jawa Timur, both of which have showcased excellent connectivity and infrastructure. The presence of DI Yogyakarta tied at the third position with Jawa Timur further emphasizes the emphasis on ensuring optimal accessibility in the top-tier provinces.

These provinces, especially DKI Jakarta and Kepulauan Riau, have set benchmarks in terms of air connectivity, efficient road networks, and availability of rail and sea connections. Their investment in infrastructure ensures that visitors can travel with minimal hassle, thereby enhancing their overall travel experience. The ease of reaching and traversing within these provinces not only boosts their appeal to potential tourists but also significantly impacts their decision-making when choosing a destination.

A strong emphasis on accessibility can significantly elevate a province's appeal to travelers. For all provinces, there's an opportunity to study and emulate the strategies employed by different regions. Enhancing air connectivity, improving road conditions, and offering efficient public transport options can substantially transform a visitor's experience.

Province	Access	Access Rank
DKI Jakarta	83	1
Kepulauan Riau	81	2
Jawa Timur	78	3
DI Yogyakarta	78	3
Jawa Barat	67	5
Nusa Tenggara Barat	66	6
Jawa Tengah	66	6
Banten	64	8
Sulawesi Selatan	59	9
Aceh	50	10
Kepulauan Bangka Belitung	48	11
Sumatera Barat	48	11
Riau	45	13
Kalimantan Selatan	44	14
Sumatera Selatan	33	15

IMTI 2023 ACES Rankings - Communication

The Communication scores derived from the Indonesia Muslim Travel Index (IMTI) 2023 spotlight the provinces that excel in conveying their unique offerings and attractions. Topping the list is Aceh, with a score of 71, affirming its approach to both internal and external communication. Following closely are DKI Jakarta and Nusa Tenggara Barat, demonstrating commendable communication strategies that resonate well with the target audience.

Aceh's leading position in the Communication category indicates its adeptness in multiple facets, from having knowledgeable tour guides and comprehensive educational programs for stakeholders to wide-ranging market outreach and effective Muslim visitor guides. The province's ability to efficiently and effectively articulate its unique offerings, coupled with its adaptability to the evolving preferences of tourists, sets it apart. Similarly, provinces like DKI Jakarta and Nusa Tenggara Barat have also showcased their prowess in the domain, leveraging robust promotional strategies to accentuate their unique selling propositions.

For provinces aiming to bolster their position in future iterations of the IMTI, the successes of some of the provinces serve as insightful case studies. By focusing on enhancing their communication strategies, ensuring the availability of informed tour guides, and tailoring their outreach initiatives to the modern traveler's preferences, they can enhance their appeal and visibility. Effective communication is paramount in attracting discerning travelers and ensuring that they have a comprehensive understanding of what awaits them in these diverse Indonesian provinces.

Province	Communication Score	Rank
Aceh	71	1
DKI Jakarta	59	2
Nusa Tenggara Barat	58	3
Jawa Barat	50	4
DI Yogyakarta	49	5
Sumatera Barat	38	6
Kepulauan Bangka Belitung	38	6
Sulawesi Selatan	37	8
Jawa Timur	32	9
Jawa Tengah	31	10
Kalimantan Selatan	30	11
Riau	27	12
Kepulauan Riau	25	13
Banten	24	14
Sumatera Selatan	17	15

IMTI 2023 ACES Rankings - Environment

The Environment scores shed light on the provinces that have managed to create a vibrant and harmonious ambiance for travelers. Sumatera Barat stands out as the leading province in this criterion, registering a score of 76. Following suit are Nusa Tenggara Barat and Jawa Barat, both of which have showcased considerable efforts in crafting an environment conducive to the discerning needs of travelers, particularly from the Muslim community.

Sumatera Barat's top rank is indicative of its comprehensive approach to tourism. This province not only sees a healthy flow of both domestic and international tourists but also showcases a strong commitment to Halal tourism. Additionally, the presence of proactive regional tourism organizations and robust sustainable tourism initiatives emphasize Sumatera Barat's readiness and adaptability to current travel trends. Nusa Tenggara Barat and Jawa Barat, with their respective scores, also echo similar sentiments. Their endeavors to adapt to the dynamic demands of the tourism sector, while ensuring a commitment to Halal practices, have evidently borne fruit.

These provinces underline the importance of a multi-faceted approach to tourism, where each element, from sustainable practices to catering to the specific needs of Muslim travelers, plays a pivotal role. The challenge lies in balancing these elements and ensuring a seamless travel experience, positioning the province as a sought-after destination on the global map.

Province	Environment Score	Rank
Sumatera Barat	76	1
Nusa Tenggara Barat	73	2
Jawa Barat	67	3
DI Yogyakarta	66	4
Jawa Tengah	65	5
Aceh	65	5
Jawa Timur	58	7
Kalimantan Selatan	56	8
Sulawesi Selatan	55	9
Banten	51	10
DKI Jakarta	49	11
Kepulauan Riau	46	12
Riau	42	13
Kepulauan Bangka Belitung	42	13
Sumatera Selatan	31	15

IMTI 2023 ACES Rankings - Services

In the realm of services tailored to meet the distinct needs of Muslim travelers, Sumatera Barat emerges as the front-runner, registering the score of 66. Closely following are Nusa Tenggara Barat and Jawa Tengah, both scoring an impressive 65. These provinces have displayed commitment to ensuring their destinations are well-equipped to cater to the faith-based requirements of Muslim tourists, particularly in terms of Halal dining options and prayer facilities.

The top rank of Sumatera Barat signifies more than just the provision of basic amenities. It underscores the province's drive to go beyond the essentials and tap into the rising demand for enriched travel experiences. This means offering access to sites resonating with Islamic history, culture, and heritage. Such destinations not only attract Muslim travelers but also ensure their prolonged stay, fostering a sense of cultural connection and enhancing their overall travel experience. The close scores of Nusa Tenggara Barat and Jawa Tengah indicate a similar pattern, where the blend of faith-based amenities and culturally rich experiences harmoniously coexist, appealing to the diverse interests of Muslim tourists.

Their success underscores the importance of a holistic approach where the seamless integration of faith-based facilities with unique cultural experiences sets the stage for a memorable travel journey. For Indonesia, these provinces can serve as benchmarks, highlighting the path for others to enhance their offerings and elevate their appeal in the global Halal tourism landscape.

Province	Service Score	Rank
Sumatera Barat	66	1
Nusa Tenggara Barat	65	2
Jawa Tengah	65	2
DKI Jakarta	63	4
Riau	62	5
Aceh	59	6
Kalimantan Selatan	54	7
Sulawesi Selatan	52	8
Jawa Timur	51	9
Jawa Barat	48	10
Sumatera Selatan	44	11
Kepulauan Bangka Belitung	40	12
DI Yogyakarta	39	13
Kepulauan Riau	39	13
Banten	36	15

IMTI 2023 Results Tables

Province	IMTI		Access			Communication				Environment					Service				
	IMTI 2023 Rank	IMTI 2023 Score	Air Connectivity	Road Infrastructure	Rail & Sea	Tour Guides	Stakeholder Education	Market Outreach	Muslim Visitor Guide	Domestic Tourist Arrivals	International Tourist Arrivals	Commitment to Halal Tourism	Regional Tourism Organization	Sustainable Tourism Initiatives	Halal Restaurants	Airport Facilities	Hotels	Cultural Heritage Sites	Tourist Information Center
Nusa Tenggara Barat	1	67	54	86	35	100	44	42	22	9	15	100	90	63	49	100	67	63	62
Aceh	2	63	40	59	42	71	83	67	52	15	1	76	81	84	28	81	67	60	96
Sumatera Barat	3	62	46	59	21	54	34	24	47	26	7	100	96	67	53	88	67	55	92
DKI Jakarta	4	60	93	90	51	91	50	40	48	100	67	48	48	18	100	100	31	55	0
Jawa Tengah	5	59	48	85	44	67	9	10	52	100	28	64	79	55	74	80	46	67	69
Jawa Barat	6	56	55	86	37	92	42	16	47	100	67	64	90	35	100	60	9	41	0
DI Yogyakarta	7	53	80	100	20	82	13	52	50	54	31	100	27	58	43	67	20	53	22
Jawa Timur	8	52	88	75	72	60	17	22	23	100	59	60	43	48	66	100	11	56	41
Sulawesi Selatan	9	51	77	69	7	50	17	49	22	60	11	48	82	61	62	47	36	55	72
Kalimantan Selatan	10	49	46	49	28	27	23	44	20	11	5	84	31	74	38	69	54	55	75
Riau	11	48	65	32	49	50	19	15	20	18	7	52	49	43	70	75	55	45	65
Kepulauan Riau	12	43	60	98	70	50	19	7	20	3	67	52	24	67	48	37	46	33	0
Kepulauan Bangka Belitung	13	42	33	63	35	38	70	3	42	3	2	40	46	80	35	75	4	49	98
Banten	14	41	47	97	7	50	13	10	22	82	67	52	46	30	80	25	6	45	0
Sumatera Selatan	15	34	47	30	17	36	0	7	37	18	4	40	13	52	57	47	18	37	82

IMTI 2018, 2019 & 2023 Ranking Comparison

Province	IMTI Rank		
	2023	2019	2018
Nusa Tenggara Barat	1	1	1
Aceh	2	2	2
Sumatera Barat	3	5	4
DKI Jakarta	4	4	3
Jawa Tengah	5	8	9
Jawa Barat	6	6	6
DI Yogyakarta	7	7	5
Jawa Timur	8	9	8
Sulawesi Selatan	9	10	10
Kalimantan Selatan	10		
Riau	11	3	7
Kepulauan Riau	12		
Kepulauan Bangka Belitung	13		
Banten	14		
Sumatera Selatan	15		
Number of datasets Evaluated	49	37	37

The Indonesia Muslim Travel Index (IMTI) has undergone significant enhancement in its analytical depth over the years, as evident from the increasing number of datasets evaluated. While the IMTI for 2018 and 2019 both utilized 37 datasets, the 2023 edition expanded its scope by incorporating 49 datasets. This growth in data quantity not only represents the inclusion of a broader range of data types, ensuring a more comprehensive assessment, but also underscores the evolving priorities and dimensions of the travel index. As a result of this expansion in analytical parameters, drawing direct comparisons between the years becomes challenging, as the foundational datasets differ substantially across the editions.

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