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ISLAMIC TOURISM CENTRE + PEAR ANDERSON

How Online Ready Are NTOs for Muslim Travellers in 2022?

Analysis, Best Practices and Case Studies

October 2022



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FOREWORD

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Director-General
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Ministry of Tourism, Arts and
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Bismillahirrahmanirrahim.

As tourism begins to pick up again this year, destinations are strategising on the best ways to welcome travellers back and reenergise the tourism industry. In this regard, the growing and well-distributed Muslim tourist market should not be overlooked.

Islamic Tourism Centre (ITC) is pleased to collaborate with Pear Anderson to present the **“How Online Ready Are NTOS for Muslim Travellers in 2022”** report. The initiative is part of our overall efforts to improve the evidence base on the Muslim tourist market to inform policy, marketing, and business decisions of governments, national tourism organisations, and tourism industry players, as well as entrepreneurs and investors. The launch of this report at the 3rd World Islamic Tourism Conference 2022 is timely and in line with the theme of the conference, “Islamic Tourism: Inspiring, Balance, Transformations and Solutions.”

Through such information gathering, data analyses and research collaborations, we hope to assist stakeholders in advancing their understanding of this market, identify market gaps, and subsequently guide them in venturing into this market through training, development, certifications and standards development, and more.

As a motivation to excel, we hope that this report and the case studies shared here will provide you with the insights into the key role that the Muslim tourist market can play towards tourism recovery. May it inspire you to view the potential of this market, insha Allah, and formulate the right strategies and action plans.

Terima kasih, thank you. Wassalam.

Dato' Dr. Mohmed Razip Haji Hasan

Hannah Pearson

Founder & Director
Pear Anderson



There are two common misconceptions when it comes to Muslim travellers visiting a destination - the first is that Muslim travellers and Middle Eastern travellers are synonymous, and the second is that calling a destination “Muslim friendly” risks alienating travellers of other faiths.

Both of these are simply not true.

Muslim travellers can come from source markets which do not necessarily jump out as being “Muslim”. For example, Germany, the UK, France and the USA all have a significant proportion of Muslims as part of the population who regularly travel overseas.

Furthermore, a destination should see the word “Muslim friendly” as not singling out Muslim travellers from general travellers, but rather it signalling that a destination is inclusive and sensitive to Muslim travellers’ needs.

As the world becomes ever more digitalised, Muslim travellers search online first for information relevant to these needs - and by creating online content specifically aimed at Muslim travellers, National Tourism Organisations (NTOs) are putting themselves ahead of the game, shaping the narrative that their destination is one in which Muslim travellers will be welcomed.

EXECUTIVE SUMMARY

Our 2022 report assesses which National Tourism Organisations (NTOs) have already created Muslim friendly online resources, what exactly they include and who has the highest score when examined against our points framework.



Taiwan and Korea drew in first place for the best online Muslim friendly travel resources globally.

We have seen an encouraging increase in the number of NTOs creating some form of Muslim friendly travel online information, up from 2019's inaugural report of 36% to 54%, led by Asia Pacific (APAC) destinations.

As NTOs surface from the COVID-19 crisis and East Asia opens up, APAC will no doubt lead further innovations in 2023, as competition for international tourists intensifies.

APAC destinations are forging ahead in terms of innovative online Muslim friendly travel resources, widening the gap between themselves and the rest of the world.

Quick Facts



54%

of the world's most visited destinations have Muslim friendly online resources (46% in 2020)



62%

of the top 10 destinations were in APAC (60% in 2020)



Cambodia, China, Georgia, Hungary, Philippines, Russia and Vietnam

scored their first points this year

The top 10 most visited destinations in the world saw a decline to 40% offering online Muslim friendly travel resources

Korea, Singapore

saw significant increases in points vs 2020



Ireland crashed out of the top 10



Why should you target the Muslim Market?

-
- » Geographically diverse, providing opportunities as different markets reopen at different speeds
-
- » Growing in size, with an increasing middle-class who have a growing discretionary spend

What do we mean by “Muslim friendly”?

Although cultures and practices may differ from country to country, there are two basic “Muslim friendly travel” needs which must be fulfilled

-
- » Halal food and drink. Food and drinks consumed by Muslims must be “halal”. In practice, this means that they should include no pork, alcohol or blood
-
- » Place for prayer. Muslims must perform prayer five times a day, although this can be compressed to three times a day whilst travelling



**MUSLIM MARKET
OUTBOUND TRAVEL SPEND IN
2021**

\$102bn

**MUSLIM MARKET
OUTBOUND TRAVEL SPEND BY 2025**

\$189bn

**MUSLIM OUTBOUND SPEND AS
A PROPORTION OF GLOBAL
OUTBOUND SPEND**

11%

ANALYSIS OF NTO MUSLIM FRIENDLY ONLINE RESOURCES

The top four destinations were very close points-wise, with just one point's difference between first and second place

Our 2022 report examines the online Muslim friendly travel resources produced by the world's top 50 most visited destinations' National Tourism Organisations (NTOs)¹, excluding those destinations which have Muslim majority populations.

Top 50

NTOs analysed
excludes Muslim majority
destinations

The intention behind this is to understand the range of online resources available, and from this, gain an insight into the extent to which non-Muslim majority destinations are putting focus on marketing aimed at Muslim travellers.

Muslim majority destinations are excluded from the research due to the general availability of facilities to cater to Muslim travellers, and therefore dedicated resources from NTOs are not essential to particularly target this market segment.

National Tourism Organisations used for analysis

Top 50 most visited destinations' NTOs, excluding Muslim majority destinations

EUROPE

Austria
Belarus
Bulgaria
Croatia
Czech Republic
Denmark
France
Georgia
Germany
Greece
Hungary
Ireland
Italy
Netherlands
Poland
Portugal
Romania
Russia
Slovakia
Slovenia
Spain
Sweden
Switzerland
Ukraine
United Kingdom

ASIA

Cambodia
China
Hong Kong
India
Israel
Japan
Laos
Macau
Philippines
Singapore
Korea (ROK)
Taiwan
Thailand
Vietnam

AMERICAS

Argentina
Brazil
Canada
Chile
Cuba
Dominican Republic
Mexico
Peru
United States of America

OCEANIA

Australia

AFRICA

South Africa



TOP 10 SCORING NTOS

2022 Rank	Tourism Organisation	2022 Score	Continent
1 ↑ 2020: 2	Korea (ROK)	25 2020: 19	Asia
● 2020: 1	Taiwan	25 2020: 20	Asia
2 ● 2020: 2	Japan	24 2020: 19	Asia
↓ 2020: 1	Hong Kong	24 2020: 20	Asia
3 ↑ 2020: 5	Singapore	22 2020: 14	Asia
4 ↑ 2020: 6	Spain	17 2020: 13	Europe
5 ● 2020: 5	Australia	15 2020: 14	Oceania
6 ↑ 2020: 7	Austria	11 2020: 9	Europe
7 ↓ 2020: 3	Thailand	10 2020: 17	Asia
8 ↑ 2020: 10	Macau	9 2020: 5	Asia
● 2020: 8	Slovenia	9 2020: 8	Europe
9 ● 2020: 9	Croatia	8 2020: 7	Europe
10 ● 2020: 10	Switzerland	7 2020: 5	Europe



For full rankings & links to online resources
<https://www.pearanderson.com/muslim-nto/>

1

KOREA (ROK) TAIWAN

Korea (ROK) and Taiwan tied in first place in the 2022 rankings.

Both destinations have climbed the rankings since our inaugural report of 2019, from third place to first. In 2022, Korea surpassed its 2020 second place ranking, whilst Taiwan maintained its impressive first place ranking for the second consecutive report.

Korea upped its score by increasing its customer centricity points, as well as making its Muslim friendly traveller information easier to find. Taiwan similarly made its Muslim friendly information findable.

Both destinations also appear as the first search result in Google for “Muslim friendly Taiwan” or “Muslim friendly South Korea”, scoring maximum points.

Taiwan gives information about Muslim friendly travel agents, as well as detailed descriptions of the ablution facilities in public prayer room spaces, whilst Korea provides detailed information around prayer rooms, including whether they are gender-segregated.

Korea and Taiwan go the extra mile in terms of Muslim friendly information provided, beyond the scoring criteria.



2

HONG KONG JAPAN

Hong Kong and Japan tied in second place, Hong Kong slipping down from its 2020 first place ranking, whilst Japan maintained its position.

Hong Kong has undergone a re-design of its global website since the 2020 report, and we are pleased to see that it has maintained its focus on Muslim friendly resources, many of which seem to have been transferred from the previous site.

A neat new feature includes an interactive map, displaying Muslim friendly attractions, food, hotels, mosques and prayer rooms.

Whilst Japan has maintained its second place position, it has also continued to innovate.

New online formats have been implemented - its general mobile app, Japan Official Travel App, also includes halal restaurants and mosques when searched, which, whilst still needs some improvement, is a major step in the right direction to integrate Muslim friendly information into general information.

3

SINGAPORE

Singapore jumped from fifth place to third in 2022, with concerted efforts around its Muslim friendly content offerings.

Not only did it launch a dedicated Muslim Visitor Guide in 2021, but also a Lifestyle Guide to Singapore for Muslim Travellers, showcasing Singapore's diversity and featuring Muslim Singaporeans for their insider tips on places to shop, stay and eat, with attractive maps and illustrations.

4

SPAIN

Spain also saw a jump in the rankings, from sixth to fourth place, through more extensive halal restaurant and hotel listings as well as making it easier to find the information on the GCC version of its website.

5

AUSTRALIA

Australia maintained its fifth place position, with plentiful Muslim friendly itinerary suggestions for travellers, and details of appropriate places to eat and pray.

However, it removed its previous functionality of displaying halal eateries as an option on its global website map search options, which we noted in the 2020 version of the report.



6

AUSTRIA

Austria moved up one place, but with little discernible improvements to its Muslim friendly information.

As 2020 reported, Austria has some basic information around halal food, and mosques - but this is only available on the Arabic language version of the site.

7

THAILAND

Thailand dropped from third to seventh place in the 2022 report, with its dedicated mobile app, *Thailand Muslim Friendly Destination*, unable to be downloaded. Some Muslim friendly travel information, including mosques and halal eateries, have been incorporated into the general AmazingThailand app, but this is accessed only via the search box.

8

**SLOVENIA
MACAO**

Slovenia and Macao ranked eighth place, providing some basic information about mosques and halal restaurants, but with no significant difference to what was available in 2020.



9

CROATIA

Croatia gained two places, from seventh to ninth. This year, we noted a section with information that Croatia offers Muslim friendly restaurants and hotels - but the page lacked vital information, including these facilities' names and locations.

10

SWITZERLAND

Switzerland maintained its tenth place position, providing information on both halal eateries and Muslim friendly hotels. However, as in 2020's report, these details are in Arabic language only, with similar limitations to Austria.

THE TOP 50

In 2022, we saw a jump in the number of the top 50 destinations offering Muslim friendly online resources vs the 2020 report, 54% vs 46%, and a substantial increase from the 36% score of the inaugural report in 2019.

There is a widening gap between high-performing destinations - such as Korea, Taiwan, Japan, Hong Kong and Singapore - and the rest, and it is noticeable that few European countries are putting concerted efforts into creating online resources aimed specifically at Muslim travellers. Asia-Pacific destinations accounted for 62% of the top 10 ranked destinations overall, a small increase from 2020's 60%.

A recent report commissioned by Wunderman Thompson Intelligence, The New Muslim Consumer Report, noted that 77% of Muslim respondents said that the consideration of whether there are halal food options in a destination factors in "a lot" as to the choice of an international travel destination, above cost (73%), whilst how friendly a government is towards Muslims is also important, coming in at third place, at 63%.¹

NTOs including Muslim friendly resources as part of their overall online marketing strategy is a way in which destinations can favourably influence the perception of its Muslim friendliness.

Seven destinations gained their first points in the 2022 version of the report - Cambodia, China, Georgia, Hungary, Philippines, Russia and Vietnam - but many of these gained one or two points through the listing of mosques as tourist attractions, rather than as part of an overarching strategy to target Muslim travellers.

Meanwhile, Ireland crashed out of the top ten, from fourth place in 2020 to scoring zero points in 2022, through a redesign of the Tourism Ireland website. The new website does not seem to have transferred the Muslim friendly information it had previously published, a disappointing step backwards.

There is a widening gap between high-performing destinations - such as Korea, Taiwan, Japan, Hong Kong and Singapore - and the rest.

TOP 10 MOST VISITED DESTINATIONS

In 2022, just 40% of the most visited destinations in the world had any online resources aimed at Muslim travellers, with Spain and Thailand scoring within the top 10, and the UK and China having limited information.

International Arrivals (million)	Tourism Organisation	2022 Rank	2022 Score	Continent
90.0	France	- ● 2020: -	0 2020: 0	Europe
83.5	Spain	4 ↑ 2020: 6	17 2020: 13	Europe
79.4	United States	- ● 2020: -	0 2020: 0	Americas
65.7	China	13 ↑ 2020: -	2 2020: 0	Asia
64.5	Italy	- ● 2020: -	0 2020: 0	Europe
45.0	Mexico	- ● 2020: -	0 2020: 0	Americas
39.9	Thailand	7 ↓ 2020: 3	10 2020: 17	Asia
39.4	United Kingdom	12 ↓ 2020: 11	4 2020: 4	Europe
35.2	Germany	- ↓ 2020: 13	0 2020: 2	Europe
33.1	Denmark	- ● 2020: -	0 2020: 0	Europe

INDUSTRY BEST PRACTICES

What the Top NTOs are doing right

Detailing information about Muslim friendly F&B certification

One of the main concerns for Muslim travellers when travelling is the availability of halal food. Use of the word “halal” is very sensitive, as it carries the connotation of being certified halal by an official Islamic authority, and NTOs must ensure that they are using the word carefully.

In 2020, we featured the approach of the Korea Tourism Organization (KTO), and the detail it goes to thoroughly explain the way in which it categorises Muslim friendly food into four types.

- » Halal certified - restaurant certified by an accredited halal certification agency such as Korea Muslim Federation (KMF)
- » Self-certified - all foods are halal, certified as halal by Muslim restaurant owners themselves
- » Muslim friendly - some halal dishes are provided but alcohol is served
- » Pork free – contains meat but no pork

Their approach remains the gold standard for DMOs to emulate.

The Taiwan Tourism Bureau (TTB) similarly details information on the certification type, but lacks the detail of what the abbreviations it uses means - a simple explanation would be helpful.

Muslim-friendly Restaurant Categories

Halal Certified	Self Certified	Muslim Friendly	Pork-free
Restaurant is certified by an accredited halal certification agency such as Korea Muslim Federation (KMF).	All food are halal. Restaurant is certified as halal by Muslim restaurant owners themselves.	Some halal dishes are provided. Alcohol may be sold.	Restaurant does not offer halal menu, but does not use pork. Alcohol may be sold.

Pictograms: In each category, the following pictograms were used to show detailed restaurant information.

Self-certified	Muslim-friendly	Pork-free

Pictogram

Muslim Owner/chef	Halal menu available	Reservation required for Halal menu	Alcohol-free	Pork-free

Screenshot of KTO's Muslim friendly restaurant categories explained on their website

Highlighting local foods suitable for Muslims

The Hong Kong Tourism Board (HKTB) provides a guide for where to find authentic, halal Cantonese cuisine¹, whilst Taiwan Tourism Bureau's e-guide² includes suggestions of treats which are Muslim friendly, such as mango ice and bubble tea.

Tourism New Zealand, whilst not included in our top 50 due to its number of 2019 international arrivals, does provide Muslim friendly resources. In its dedicated Muslim traveller guide, it notes that, "New Zealand food goes way beyond fish and chips and barbeques – our chefs have developed a distinct Pacific Rim cuisine. Expect to indulge in plenty of seafood, award-winning cheeses and of course, our famous lamb. You should also expect a laid-back, friendly atmosphere wherever you eat; we Kiwis love to keep things casual".



Screenshot of Taiwan Tourism Bureau's food section on their e-guide

TOP 3 EXPERIENCES THAT MUSLIM TRAVELLERS ARE LOOKING FOR³

1. Food or Culinary
2. Local Tradition and Culture
3. Seasonal Experiences

The best-in-class NTOs recognise that travellers want to taste authentic local cuisine which is halal.

¹ <https://www.discoverhongkong.com/seasia/explore/muslim-travel/best-halal-food-places-in-hong-kong.html>

² <https://eng.taiwan.net.tw/att/files/Taiwan%20Travel%20Guide%20for%20Muslim.pdf>

³ 2022 Have Halal Will Travel - Pear Anderson survey

Recognising that Muslims may prefer to self-cater

Some Muslim travellers prefer to self-cater when they are overseas, and NTOs should recognise that they may also need information about where to find halal foodstores to cater for their needs.

The TTB includes halal butchers under its special section for “Shopping” on the website.

33%

**OF MUSLIM TRAVELLERS
PREFER TO STAY IN
APARTMENTS OR
AIRBNBS¹**

Making Muslim friendly content easy to find



JNTO's Malaysia version of their website

The top NTOs make it easy for Muslim travellers to access Muslim friendly information on their platforms.

In general, NTOs take two approaches to this:

- » Including Muslim friendly information as a category on its global website or
- » Using a more localised approach, where the website's menu and submenu options are adapted for those country versions which would be more likely to be visited by potential Muslim travellers, e.g. Singapore Tourism Board's Malaysia country website version

Of course, the more places where travellers can come across this information, the better.

The TTB includes links to access information about Muslim friendly travel in two places on its menu, under both “Food” and “Travel suggestions”, whilst Japan has a section easily found on its Malaysian version of the website.

Optimising for search engines

Taiwan, Hong Kong and Korea all appear in first place in a Google search for the term “Muslim friendly [destination]”.

By appearing first, the destination can shape the narrative that they are a destination which is welcoming to Muslim travellers.

During our research, we occasionally saw negative results that prospective Muslim travellers could come across, e.g. the Czech Republic’s first search result showing a page titled “Czech Republic’s tiny Muslim community subject to hate”. This immediately creates a negative impression of the destination.

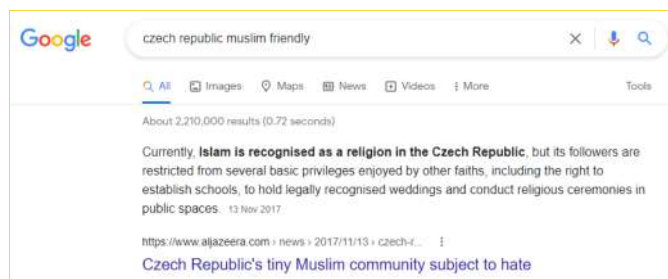
By creating a dedicated page to Muslim travellers’ needs, there is a greater possibility that the page would outrank other, more negative, articles.

A report by Sistrix in 2020, which analysed over 80 million keywords and billions of search results, showed that the click through rate for the first organic search engine result was 28.5%, second position 15.7% and the third position 11%, whilst the tenth position saw just a 2.5% click through.¹

Detailing prayer room amenities

Muslim travellers do not necessarily require a mosque to perform their prayers - or even a dedicated prayer room, but Taiwan and Korea go above and beyond when it comes to details surrounding prayer spaces in the destination. This adds to the positive impression of them being Muslim friendly.

Taiwan details whether washrooms are water-friendly, whilst Korea details what amenities are available, for example a copy of the Quran, prayer mats, or female prayer clothing.



Screenshot of Google's search results page

¹ <https://www.sistrix.com/blog/why-almost-everything-you-knew-about-google-ctr-is-no-longer-valid/>

Detailing hotel facilities which are Muslim friendly

Similarly, staying at a Muslim friendly hotel is not a must, but amenities such as prayer mats, qibla direction or halal menus do help to make Muslim travellers more comfortable.

Japan and the JNTO leads the way here, detailing exactly why certain hotels are considered to be Muslim friendly, including what prayer equipment is available at the premises, any prayer spaces available, and if there are Muslim friendly dining options.

Creating communication guides

Communication, particularly for those destinations where English is not widely spoken, is a concern for Muslims.

Muslim respondents in a recent 2022 survey conducted by Have Halal Will Travel and Pear Anderson frequently listed communication as a worry for travellers, as being completely clear about what they are consuming is vital.

JNTO and HKTB have both put together phrase sheets with translations which Muslim travellers can use, allowing them to avoid any miscommunications where they might accidentally consume haram ingredients.



KTO's communication guide



JNTO's app featuring Halal restaurants and shops

Integrating Muslim friendly information into travel apps

Many NTOs have launched their own general travel app, providing information for general travellers on anything from restaurants to itineraries.

If an NTO has information which they have already compiled on Muslim friendly amenities, these should ideally be included into the app, also.

JNTO does this, and searches in the app for “halal” or “mosque” produces useful results.

Thinking of the whole travel journey

The best-in-class NTOs consider the whole experience of the Muslim traveller in destination, going beyond just halal food and places to pray.

The Singapore Tourism Board (STB) does just that, in its 2021 guide for Muslim travellers.¹

Multi-day itineraries are created which take travellers from sightseeing attractions to places to eat, to places to pray, in a clearly laid out, attractive design.

Tourism Australia, too, has dedicated multi-day itineraries starting in key tourist cities such as Canberra² or Melbourne³, with suggestions of places to eat and visit along the way.

Segmenting travellers

Our 2020 report noted that some NTOs were starting to implement marketing segmentation for the Muslim market, rather than seeing it as one homogeneous group.

STB are the leaders when it comes to more sophisticated marketing – in 2020, within their Muslim guide itself, they had dedicated itineraries for “Modern Millennial Muslim” travellers or for “Family Fun”.

In 2021, this guide showcases places to shop, visit and stay, highlighting “passion” stories, focusing on people and places. The companion guide, the “Lifestyle Guide to Singapore for Muslim Travellers”⁴, interviews local Singaporean Muslims on the places where they eat and shop, adding a more personalised flavour to the guide.

¹ <https://www.visitsingapore.com/content/dam/desktop/my/deals/mvg/muslim-visitor-guide-2021-en.pdf>

² <https://www.australia.com/en-my/trips-and-itineraries/canberra-and-surrounds/muslim-friendly-guide-5-days-in-canberra.html>

³ <https://www.australia.com/en-my/trips-and-itineraries/melbourne-and-surrounds/muslim-friendly-guide-melbourne-to-sydney-coastal-drive.html>

⁴ https://www.visitsingapore.com/content/dam/desktop/global/about-singapore/traveller-information/guides/mvg2_supp_en.pdf

OPPORTUNITIES FOR NTOS TO IMPROVE

Whilst we have seen encouraging progress in the 2022 edition in terms of innovation, there is still a long journey ahead to bring these resources to the next level

Updating e-guides

COVID-19 has wreaked havoc on the entire tourism supply chain, and the smaller halal F&B outlets may well have changed hands, lost their previous halal certifications, or even closed down altogether.

NTOs must go through a process of verifying information once again, to ensure that travellers can be confident in the information provided.

For instance, the TTB's last Muslim travel guide e-book is dated 2017, the STB's is 2021 and Tourism New Zealand's 2020.

Given that precious resources are needed to gather this content, a stop-gap solution could be a prominent caution on the online resources, with the date that these guides were last updated. This will flag it up to the traveller's attention, and signal that they may need to do their own research to verify if halal certificates are still valid, or the place is even still open.

Fixing broken links

What has also become apparent in our 2022 audit of online content is that there are many broken links or outdated references.

For instance, KTO's landing page for Muslim travellers shows three e-guides – but they can only be opened in selected internet browsers.

The Tourism Authority of Thailand (TAT) launched a new version of its Muslim traveller app in 2020 – yet it cannot be downloaded from mobile app stores.

In light of the fact that the TAT have prominently proclaimed that they want to attract Middle Eastern visitors in 2022 – and 200,000 from Saudi Arabia – having its Muslim friendly app functioning and providing vital information would be a crucial tool to boost confidence.

Being clear about why an attraction or a hotel is Muslim friendly

Some NTOs have provided lists of “Muslim friendly” hotels and attractions – but have not given an explanation as to why they are considered Muslim friendly.

For instance, HKTB has a wonderful Muslim friendly map which includes hotels and attractions – but doesn’t detail what they offer – or define why they are “Muslim friendly”.

Joining the dots and being clear on why something is “Muslim friendly” avoids miscommunications, or the traveller having to figure it out for themselves.

Translating content or making it available on global pages

Lastly, the 2022 report came up against one of the same issues as the 2020 version of the report: having Muslim friendly information either only in Arabic, or only on the Middle Eastern localised version of the NTO website.

Switzerland and Austria continue to have their content solely available in Arabic, whilst Spain has the content on the Middle Eastern version of the website only, leaving it to the more determined non-Middle Eastern or English-speaking Muslim traveller to discover.

Given that the same information would be of interest to all Muslim travellers, not only Arabic speaking ones, we would encourage NTOs to consider translating the information into English – and vice versa, too.

Attractions with Muslim friendly facilities are more attractive.

Indonesian Muslims

90%

Malaysian Muslims

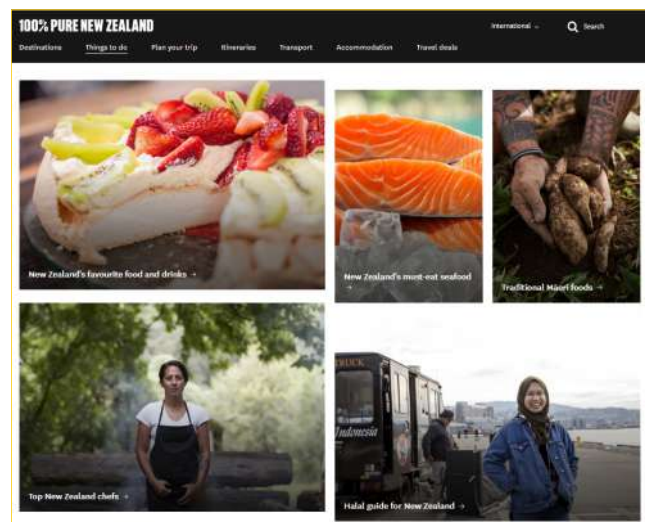
95%

would feel more interested in visiting an attraction if they knew it had Muslim friendly facilities¹

Integrating Muslim friendly resources

Muslim friendly resources are often completely separate from other information on an NTO's website.

Whilst it is a positive that there is a dedicated section to Muslim travellers on the website, this information could also be integrated or cross-referenced in other sections of an NTO website, for example into food and beverage (F&B) listings or itineraries.



New Zealand's NTO website featuring Halal information

Integrating Halal into F&B sections

» As a special section within dining

Many NTOs have overviews of their different cuisines, or options for dietary requirements such as vegetarianism. An additional link here could easily point Muslim travellers to Muslim friendly specific information, with the benefit of making it easy to find the information they need.

» As a category on listings or maps

Many of the NTOs have maps, where travellers can filter restaurants by categories, e.g. on the KTO website, travellers can filter by "Asian" or "Vegetarian" food – but not halal. JNTO has different filter categories on its restaurant search under "Services", "Atmosphere" or "Occasion". Switzerland has options to search for kosher food – but not halal.

Given that these three NTOs already have specific information on Muslim friendly restaurants, it would be a matter of sharing this information with the appropriate database, rather than finding information from scratch.

Integrating Muslim friendly itineraries

» As a category within the general itinerary listings

Some NTOs feature suggested itineraries for travellers around different themes, such as Road Trips, or Luxury like Tourism Australia – but Muslim friendly isn't one of the categories suggested.

Given that Tourism Australia have already produced these itineraries which are homed under the Muslim friendly section of the website, it would make sense to also ensure that these are given as a filter option on the general itinerary search.

Practical first steps for NTOs new to Muslim friendly travel

Creating new Muslim friendly online travel content can feel overwhelming as to where to start.

We recommend that NTOs start this journey by creating a simple webpage pulling together resources for Muslim travellers in one place. This should cover a Muslim traveller's two basic daily necessities:

- » Places to find halal food
- » Places to pray

If an NTO has limited resources, this information could be as basic as listing mosques in the destination's capital or major cities, and providing a link to the website of the local Islamic authority who is in charge of halal certification, so that travellers can find more information.

As internal resources become available, more curated information and easy-to-access formats can be added.

And of course, with the travel journey often beginning from a search engine, the more information that the NTO is able to provide on Muslim friendly facilities in the destination, the higher chance it will have of being discovered through online search.

“
Respect our religion, treat us the same. We also have desire to travel and experience other country culture and places of interest.”

– 45-54 year old female, Malaysia¹

CASE STUDY TAIWAN TOURISM BUREAU

Taiwan

THE HEART OF ASIA

Image credit: Taiwan Tourism Bureau



“The Taiwan Tourism Bureau provides complete Muslim friendly travel resources on the internet, in the hope of boosting the confidence of Muslim travellers to visit Taiwan.”

Mr Abe Chou

Taiwan Tourism Bureau
Director, Kuala Lumpur Office

Taiwan has consistently remained at the top of our rankings since 2019 for online Muslim friendly travel resources - will Muslim travellers play a key role in your recovery strategy?

Yes, Muslim travellers will play a very important role in Taiwan's inbound tourism market after the recovery of tourism, as the Muslim travel market is one of the fastest growing tourism sectors in the world, and has huge potential.

What is the motivation behind creating online resources specifically aimed at Muslim travellers?

Taiwan has always been committed to improving its online travel information services and the Taiwan Tourism Bureau has been actively providing online Muslim friendly travel-related information in line with the continuous improvement of online technology services.

COVID-19 caused the closure of many restaurants - how challenging has it been to keep your information updated about Muslim friendly F&B establishments?

COVID-19 had a huge impact on the tourism-related industry, causing many Muslim friendly restaurants to close or suspend operations. Therefore, Taiwan Tourism Bureau has invested a lot of resources to update the relevant information.

Do you have an idea of the number of Muslim travellers who visited Taiwan pre-pandemic? Which source markets were they predominantly from?

Since Taiwan does not have statistics on the religion of incoming visitors, we do not know the number of Muslim visitors travelling to Taiwan each year. However, it is assumed that Indonesia is currently the main source of Muslim visitors.

Your online resources go beyond just listing halal restaurants and prayer spaces to even giving details on the Muslim Friendly Environment, with details on facilities for ablution - what motivated Taiwan Tourism Bureau to include this?

Muslim travellers in general are concerned that Taiwan cannot provide a good Muslim friendly travel environment. The Taiwan Tourism Bureau provides complete Muslim friendly travel resources on the internet, in the hope of boosting the confidence of Muslim travellers to visit Taiwan.

Are you complementing your online resources with offline activities?

Yes, Taiwan Tourism Bureau also actively use offline activities to support online resources, while hoping to provide more target groups with different needs.

What are your plans for the Muslim market, going into 2023? Will the Salam Taiwan brand be continued?

Taiwan Tourism Bureau expects to revive and continuously develop the Muslim tourism market in 2023, so we will continue the branding of Salam Taiwan and expand the image of Taiwan as a Muslim friendly tourism destination.



CASE STUDY SINGAPORE TOURISM BOARD



Image credit: Singapore Tourism Board



“ STB has worked to continuously market and communicate Singapore’s appeal as a Muslim-friendly destination ”

**Mr John
Conceicao**

**Singapore Tourism Board
Executive Director, Southeast Asia**

Singapore has jumped from fifth to third place in 2022 for online Muslim friendly travel resources - how key a role will Muslim travellers play in your recovery strategy?

The Muslim traveller segment is important for Singapore Tourism Board (STB), as two of our key visitor source markets, Indonesia and Malaysia are home to large Muslim populations (87% and 61% respectively).

Do you have an idea of the number of Muslim travellers who visited Singapore pre-pandemic? Which source markets were they predominantly from?

Pre-Covid, Indonesia and Malaysia were consistently ranked in our top markets and continue to demonstrate strong inbound travel potential for Singapore - From Jan to Sept 2022, Indonesia was Singapore's top source market for visitor arrivals while Malaysia ranked third. Both markets have so far contributed 968.19k visitors in 2022, which is about 26% of total international visitor arrivals into Singapore.

In 2021, you launched the Muslim Lifestyle Guide - why did you decide to go beyond having just your Muslim travel guide?

With the Muslim Lifestyle Guide, STB hopes to creatively showcase Singapore's Muslim-friendly experiences across F&B, retail and lifestyle, and encourage more Muslim visitors to explore what Singapore has to offer such as Fairytail Gastrobar, a halal rooftop dining gastrobar or a tour to Singapore's offshore islands.

STB is one of the few NTOs who have segmented Muslim travellers into different interest groups: Modern Millennial Traveller and Family Traveller. How did you define these?

STB has worked to continuously market and communicate Singapore's appeal as a Muslim-friendly destination – our VisitSingapore website and social media pages regularly feature content on halal offerings in Singapore, and we have also worked with relevant content partners such as Have Halal Will Travel to drive awareness of these offerings. We continue to focus on the Early Careers and Family segments, as Singapore's strengths in safety, convenience and Halal-friendly amenities tend to appeal to these groups.

What are your plans for the Muslim market, going into 2023?

In 2023, STB will continue to build the Muslim segment's interest in Singapore through a mix of local influencers/KOLs engagement, online media partnerships and in-market activations.

This includes a collaboration with artist, songwriter, and music producer, Maher Zain, as part of the SingapoReimagine tourism recovery campaign. Maher will explore Singapore and showcase lesser-known and unexpected experiences Muslim visitors can enjoy. Maher will also explore some of his passions in Singapore aside from singing and the arts.

The campaign assets are tentatively slated for release in November 2022, with subsequent releases to be in April/May 2023 in conjunction with the Hari Raya celebrations.

METHODOLOGY

We undertook our research from August to September 2022, basing it on the top visited destinations globally with non-Muslim majority populations. Belgium has been excluded from this top 50, as there is no centralised NTO website for the destination.

Scoring methodology

How scores are calculated (max 28 points)

Prayer facilities (max 3 points)

- 1 - List mosques in capital city or at least one major mosque in the destination
- 2 - List mosques and prayer rooms in capital city
- 3 - List mosques and prayer rooms in major tourist cities

Dietary requirements (max 4 points)

- 1 - List Muslim friendly restaurants in capital city
- 2 - List Muslim friendly restaurants in capital city with categories (e.g. certified halal, self-declared, pork-free)
- 3 - List Muslim friendly restaurants in major tourist cities
- 4 - List Muslim friendly restaurants in major tourist cities with categories (e.g. certified halal, self-declared, pork-free)

Accommodation (max 3 points)

- 1 - List a few Muslim friendly hotels
- 2 - Large list of Muslim friendly hotels in capital city
- 3 - List of Muslim friendly hotels in major tourist cities

Customer centricity, what information formats are available (one point each, max 7 points)

- 1 - Section of main website
- 1 - Dedicated website or mini-site
- 1 - Downloadable eGuide
- 1 - Dedicated mobile app
- 1 - Section/pages of NTO mobile app
- 1 - Videos targeted to Muslim friendly activities/facilities
- 1 - Halal sub-category on official NTO restaurant listings

Ease of information discovery possible classifications (max 5 points)

- 1 - Found via website search box or SEO only
- 2 - Separate, hidden subsection of localised NTO website
- 3 - Separate, hidden subsection of main NTO website
- 4 - Easily found on main menu of localised NTO website
- 5 - Easily found on main menu of main NTO website

SEO Visibility (max 6 points)

- 1 - Third page or lower
- 2 - Second page
- 3 - Fourth result or under on first page
- 4 - Third result on first page
- 5 - Second result on first page
- 6 - First result on first page



For full rankings & links to online resources
<https://www.pearanderson.com/muslim-nto/>



ABOUT PEAR ANDERSON

Pear Anderson are a boutique travel industry consultancy firm, experts in Muslim tourism and Southeast Asian outbound tourism.

They partner across the spectrum of tourism-related organisations to build a lasting foundation in Southeast Asia. The global Muslim travel segment is a core specialisation and Pear Anderson provide unique insights and access to this lucrative segment.

Pear Anderson regularly author reports and whitepapers, and speak at prestigious travel conferences, such as ITB Asia and the Royal Geographical Society's Annual Conference. Their work has been featured on BBC World News, Bloomberg, the Straits Times, BFM and TTG Asia, amongst others.

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<https://www.pearanderson.com>

ABOUT ISLAMIC TOURISM CENTRE

Islamic Tourism Centre (ITC) is an entity under the Ministry of Tourism, Arts and Culture, Malaysia tasked to develop the Islamic tourism segment for Malaysia. It advocates for Muslim-friendly tourism (MFT) by offering research and market intelligence, training, industry development consultation, Muslim-friendly tourism and hospitality (MFTH) service standards and certification, and information exchange.

In 2021, ITC received two key awards, i.e. Strategic Business Alliance Award at The BrandLaureate World Halal Best Brand E-Branding Awards 2021, and Best Islamic Tourism Leadership Gold Award 2021 by Malaysia Tourism Council. These are recognition of ITC's efforts and endeavours in formulating new strategies to meet the new normal of the business environment to ensure business continuity and sustainability, notwithstanding its role to develop and grow the Islamic tourism segment in Malaysia.

In 2022, Malaysia was again named top destination in the world in the MFT sector by the State of the Global Islamic Economy (SGIE) Report 2022 by DinarStandard in partnership with Salaam Standard and supported by Dubai Department of Economy and Tourism.

Malaysia also retained the top-ranked destination in the MasterCard-CrescentRating Global Muslim Travel Index (GMTI) 2022, a position it has defended since the launch of the Index in 2015.

These recognitions are an added motivation for ITC to continue to strengthen its efforts in being a prime mover and leading institution to ensure Malaysia is at the forefront of MFTH.

For further details, kindly contact:

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Follow ITC on these social platforms:

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