

ANALYSIS OF MUSLIM FRIENDLY TOURISM INDICATORS TOWARD THE NUMBER OF FOREIGN TOURIST VISITATIONS

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Abstract

Muslim Friendly Tourism (MFT) ordinarily caters to meet Muslim tourists' needs and lifestyles. Many Muslim-friendly tourist destinations are currently being offered by countries incorporated in the Organization of Islamic Cooperation (OIC). Nonetheless, statistical evidence shows that the number of non-Muslims foreign tourists is far ahead of Muslim travelers. This study aims to analyze the impression of MFT indicators on the number of foreign tourist visits and define specific indicators that have a principal power influencing international visitations to the countries incorporated in the OIC. Panel data regression method with time-series data is processed using Econometric Views (Eviews 9.0) as an analysis tool. The results showed that eight independent variables on the Global Muslim Travel Index (GMTI) collectively affected the dependent variable by 97.49%. The present study found that the family-friendly destination variable has a simultaneous effect of 0.012, yet seven other variables did not significantly influence the number of foreign tourists traveling to countries incorporated in the OIC.

Keywords: *Muslim friendly tourism, foreign tourists, tourist destinations, Global Muslim Travel Index*

I. Introduction

Tourism is one of the world's prominent economic sectors with a progressive trend in the game. According to the World Tourism Organization, foreign tourists' arrival grew by 5%, reaching 1.4 billion in 2018, and this total was achieved two years earlier than the initial estimation (United Nation World Travel Organization, 2019). Nevertheless, export revenue generated by tourism developed by 4% or equivalent to USD 1.7 trillion. The tourism sector has a significant

role in social-economic growth (Adwiyah, 2015; Asthu, 2020; Mendola & Volo, 2017) and has become a character for many countries to this day (Jarvis et al., 2016; Paci & Marrocu, 2014; Srihadi et al., 2016; Tang & Tan, 2013).

The positive trend line between foreign tourists and the increased country income is the most palpable projection to measure tourism's benefit in a particular country. According to Marrocu et al. (2015) a definite relationship between spending by

foreign tourists and the number of days spent during their trip was evident, meaning that the travel period spent at the destination will increase the number of living expenses. This concept also applies to Muslim tourist businesses evolving into the global market spotlight (Oktadiana et al., 2016).

The fundamental beliefs of Islam have always encouraged Muslim people (Muslims) to travel. Traveling in Islam is not solely a summon to perform Hajj or Umrah, which is acknowledged as a pilgrimage to Mecca's holy city in Saudi Arabia. According to the Islamic religion, traveling is also perceived as an exercise to meet the needs of satisfying leisure, social life, welfare, knowledge, and discovering the beauty of God's divine creation (Yousaf & Xiucheng, 2018). Since the terms 'Muslim friendly tourism' and 'Islamic tourism' are slightly different, the debate about these terms' suitability always emerges. However, the two terms link to tourism activities that adhere to Islamic thought associated with Halal principles (Mohsin et al., 2016). Halal principles will affect the acts and behavior of a Muslim. According to Han & Hyun (2017), behavior greatly determines a person's desire and efforts to engage or not in certain circumstances.

Several countries worldwide developed Muslim friendly tourism solely to attract Muslim tourists. Countries that are

members of the Organization for Islamic Cooperation (OIC) and non-OIC have shown their dedication to working on Muslim-friendly attributes in destinations. The Travel & Tourism Competitiveness Index (TTCI) issued by the World Economic Forum (WEF) pronounced that Muslim-friendly destinations have listed indicators covering tourism competitiveness. One of the reports from OIC and non-OIC countries is compiled in the Global Muslim Travel Index (GMTI) issued by Crescent Rating since 2015 (Oktadiana et al., 2016).

However, the growing confidence of Muslim friendly tourism being promoted in OIC countries is nevertheless problematic considering the proportion of Muslim outbound to global outbound in 2018 was 140 million to 1.4 billion, which is equivalent to ten folds for global outbound against Muslim's (MasterCard-CrescentRating, 2019; United Nation World Travel Organization, 2019). In light of the above reasons, this study aims to analyze the impression of Muslim friendly tourism indicators on the number of foreign travelers and define specific indicators that have a principal power influencing their visitations to the countries incorporated in the OIC.

Literature Review

Tourist Destination Competitiveness

The tourism industry has long progressed into a competitive sector and plays a vital role in expanding various businesses and destinations (Shafaei & Mohamed, 2015). Great competitiveness is represented by a destination's ability to play in bringing more tourists coming in. The number of foreign tourists' visits affects the country's foreign exchange and improves the local economy's welfare (Webster & Ivanov, 2014). The journey of foreign travelers affecting the country's mobilization will stimulate a better variety of business sectors, public infrastructure, and betterment in human resources (Paci & Marrocu, 2014).

Besides, tourist destination managers must intensify their business acumen to maximize economic value through product development, customer satisfaction, and expand markets for more substantial competitiveness (Kubickova & Martin, 2020). Mapping the ability of the tourism industry in business requires quantification of competitiveness and business excellence. Various efforts by providing indicators as information for policymakers and industry players intending to hopefully assist them in recognizing the tourism business's future and increasing tourist visits had been performed (Srisusilawati, 2020)(Gómez-Vega & J Picazo-Tadeo, 2019).

The quality development of the Muslim-friendly destinations seen through the Global Muslim Travel Index (GMTI) variable

The definite term for Halal tourism is quite debatable and has become polemic in Indonesia up to now. There have been mixed responses to the term 'Halal tourism.' As a result, terms such as 'Muslim friendly tourism' and 'Islamic tourism' are used interchangeably (Battour & Ismail, 2016). The word Halal comes from the Arabic language and is also found in the Quran implies ideas or acts permitted by Sharia (Islamic law). Halal is an object or act that is allowed to be practiced or exercised according to Islamic law (Ainin et al., 2020; Ali et al., 2017; Mohsin et al., 2016).

Therefore, Muslim tourists are obligated to practice their beliefs wherever and whenever they are (Jafari & Scott, 2014). For Muslims, faith and spirit are united thus cannot be separated. Qualities needed by Muslim tourists according to religious demands comprising of Halal food, availability of prayer space, non-alcohol victuals, and separate facilities for men and women are some of the properties of Halal features that must be fulfilled according to Islamic law, or commonly known as Sharia Law (Battour et al., 2013; Jafari & Scott, 2014). These Halal characteristics are

required to be fulfilled, regardless of how a Muslim views their religious commands.

Apart from Saudi Arabia and Iran, many countries in the world have started to implement Muslim friendly tourism and have introduced the concept of Muslim friendly tourism (Shafaei & Mohamed, 2015). As of now, large non-Muslim countries such as Japan and South Korea have adopted Muslim friendly tourism concept by offering Muslim-friendly tourism products and services (Han et al., 2019). In favor of attracting Muslim tourists, endeavors to understand Muslim tourists' needs through a competitiveness study are essential in preparing strategic plans targeting Muslim tourists (Ryan, 2016).

Since 2011, CrescentRating has analyzed Muslim friendly tourism trends in many country's destinations in the world. The report partnered with Mastercard was formerly called the "CrescentRating Annual Ranking" and later modified to Global Muslim Travel Index (GMTI). The first GMTI report was published in 2015, and the 2019 edition is the 5th edition report (MasterCard-CrescentRating, 2019). Since the GMTI report develops according to ongoing market developments, added indicators to the latest report are inevitable.

Apart from providing updates on destinations, GMTI focuses on ranking Muslim friendly-destinations, both countries incorporated in the Islamic Cooperation Organization (OIC) or not.

Muslim-friendly destinations in countries incorporated in the Islamic Cooperation Organization (OIC)

The concern in Muslim friendly tourism is rapidly growing due to the continued expansion of the global Muslim population (Battour & Ismail, 2016; Shafaei & Mohamed, 2015). Factors such as the high growth of middle-class Muslims, an increasing number of productive ages, easy access to tourist information, and the availability of Muslim-friendly facilities contribute to the expanse of Muslim tourists traveling worldwide.

As many as 156 million Muslims are expected to travel by the ending of 2020 (MasterCard-CrescentRating, 2019). This number is supported by countries incorporated in the OIC as they contribute to the number of Muslim people and provide a destination that makes up Muslim-friendly attributes. Table 1 below shows the ranking of OIC countries based on the GMTI 2015-18:

Table 1
Ranking of OIC countries based on the GMTI 2015-18

No	Countries	2015	2016	2017	2018
1	Albania	48	57	58	39
2	Algeria	21	22	22	21
3	Azerbaijan	22	23	24	26
4	Bahrain	15	11	9	8
5	Brunei	11	12	13	11
6	Egypt	16	17	14	15
7	Indonesia	6	4	3	2
8	Iran	14	15	11	17
9	Jordan	8	10	12	13
10	Kazakhstan	18	16	17	20
11	Kuwait	13	13	15	11
12	Lebanon	29	27	29	23
13	Malaysia	1	1	1	1
14	Maldives	17	18	16	18
15	Morroco	10	9	7	10
16	Mozambique	68	90	85	93
17	Oman	7	7	8	9
18	Qatar	5	5	6	6
19	Saudi Arabia	4	6	5	5
20	Tajikistan	28	26	26	34
21	Tunisia	12	14	19	13
22	United Arab Emirates	3	2	2	2
23	Uzbekistan	27	28	28	32

(MasterCard-CrescentRating, 2015, 2016, 2017, 2018)

Countries that are members of the OIC and non-OIC are treated differently in carrying out a Muslim friendly tourism development concept. For example, to provide products and services that are wholly appropriate with Islamic Sharia, members of the OIC can easily comply with the Halal element as it is integrated with their culture without the need to execute significant efforts like countries from non-OIC countries. Even though secular OIC countries such as Turkey and Indonesia attract extra Muslim and non-Muslim

interests (Boğan et al., 2020), they must perform extra work to practice Halal tourism systems to the mark.

Research Methods

This study uses a quantitative approach with an emphasis on testing hypotheses that will present conclusions. In order to find the effect and values between the dependent and independent variables, panel data regression was used for analysis. The independent and dependent variables in this study are shown in Table 2 below:

Table 2
The independent and dependent variables were adopted from Global Muslim Travel Index (GMTI)

Global Muslim Travel Index (GMTI) Indicators	Variables	Annotation
Inbound (I)	Y	Foreign tourists
Family-friendly destination (FFD)	X1	Family-friendly destination
Muslim traveler and General safety (MTGS)	X2	Comprehensive security for Muslim tourists
Dining options and Halal assurance (DOHA)	X3	Halal Product Guarantee
Access to prayer spaces (APS)	X4	Ease of access to prayer facilities
Airport Facilities (AF)	X5	Muslim-friendly airport facilities
Akomodasi (H)	X6	Sharia-based accommodation
Ease of communication (EC)	X7	Ease of communication
Muslim travel needs awareness outreach (MTNA)	X8	Availability of public guides, information, and community engagement in the destination

(MasterCard-CrescentRating, 2015, 2016, 2017, 2018; World Bank, 2020b)

Secondary data in cross-sections set from 2015 to 2018 were used (the 2019 report was not used due to a lot of incomplete foreign data by the time this article was drafted.) Eight over 14 independent variables sourced from GMTI were used (the other six variables were not used because they were only available in 2016 reports afterward. For consistency, the variables used were based on the 2015-18 GMTI reports. The dependent variable and population used are data on foreign tourist visits to countries incorporated in the OIC gathered from the World Bank.

Members of the OIC used as the research population are Albania, Algeria, Saudi Arabia, Azerbaijan, Bahrain, Brunei, Egypt, Indonesia, Iran, Jordan, Kazakhstan, Kuwait, Lebanon, Malaysia, Maldives, Morocco, Mozambique, Oman, Qatar,

Tajikistan, Tunisia, United Arab Emirates, and Uzbekistan. The data was processed using Econometric Views (*Eviews 9.0*).

II. Discussions

Data Processing Results

The first step in data processing is to define three estimation models: the Common Effect Model (CEM), Fixed Effect Model (FEM), and Random Effect Model (REM). With the equation model:

$$Y_{it} = \alpha + \beta_1 X_{1it} + \beta_2 X_{2it} + \dots + \beta_n X_{nit} + e_{it}$$

Annotation:

$$Y_{it} = \text{dependent} \quad t = \text{period at-t}$$

$$X_{it} = \text{independent} \quad i = \text{entity at-i}$$

$$\alpha = \text{constant} \quad e = \text{variable outside the model}$$

The results obtained from the three models are presented in Table 3 below:

Table 3
CEM, FEM, and REM estimation results

Variables	Common effect		Fixed Effect		Random effect	
	t-Statistic	Prob.	t-Statistic	Prob.	t-Statistic	Prob.
X1	4.177801	0.0001	3.164554	0.0024	3.025573	0.0033
X2	5.562576	0.0000	1.749632	0.0852	1.348173	0.1813
X3	0.072911	0.9421	1.369553	0.1758	1.386043	0.1694
X4	2.767578	0.0069	0.344582	0.7316	-0.180093	0.8575
X5	1.258168	0.2118	1.633178	0.1076	2.636668	0.0100
X6	-2.130491	0.0361	-1.060892	0.2929	-0.843066	0.4016
X7	-1.077753	0.2842	-0.874389	0.3853	-0.803887	0.4238
X8	0.120316	0.9045	-1.599146	0.1150	-1.106460	0.2717

The above table shows the t-Statistic and probability chosen in the panel data regression. Each model has a varied significance. In order to get the best

representation, the Chow and Hausman Tests were carried out, as shown in Table 4 and Table 5 below:

Table 4
Chow test

Effects Test	Statistic	d.f.	Prob.
Cross-section F	89.152956	(22,61)	0.0000
Cross-section Chi-square	322.105713	22	0.0000

For finding the best model between CEM and FEM, a Chow Test was performed. Based on the Chow Test table, it was found that the probability value of the

Cross-section Chi-square was smaller than alpha (α) ($0.0000z < 0.05$), meaning that FEM was better than CEM in this study.

Table 5
Hausman test

Test Summary	Chi-Sq. Statistic	Chi-Sq. d.f.	Prob.
Cross-section random	16.050309	8	0.0417

The Hausman test was conducted to examine the best model between FEM and REM. The Hausman Test table shows that the probability value of Cross-section random was smaller than alpha (α) ($0.0417 < 0.05$), which means that the FEM model was better than REM. Based on the Chow

Test and Hausman Test, FEM is a proper model in this study.

Classical Assumption Test

The classical assumption test is a requirement when FEM is selected. The classical tests conducted were normality tests, multicollinearity tests,

heteroscedasticity tests, and autocorrelation tests.

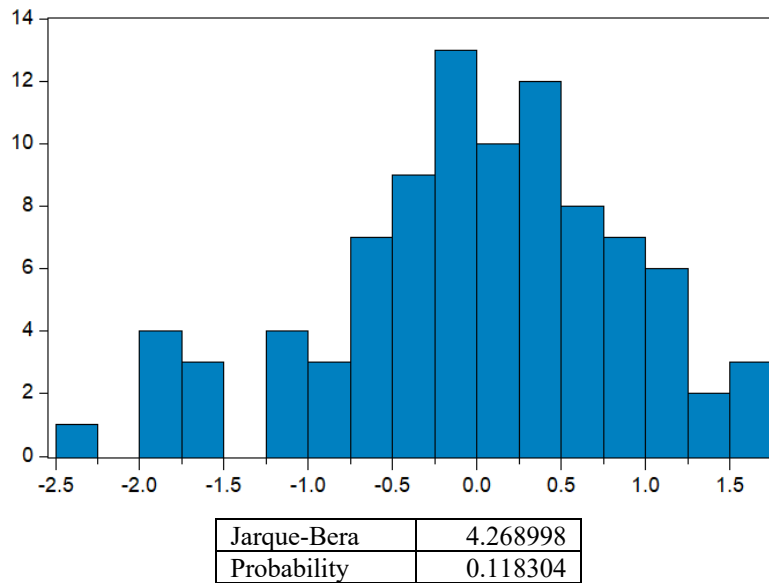


Figure 1. Normality test results

The normality test shows the Jarque-Bera value of 4.268998 with a Probability value of 0.118304 greater than α (0.05), indicating that the data is normally distributed.

The multicollinearity test results are shown in Table 6 below:

Table 6
Multicollinearity test

	X1	X2	X3	X4	X5	X6	X7	X8
X1	1.000000	0.230149	0.298642	0.276768	0.470969	0.579308	0.420446	0.491089
X2	0.230149	1.000000	0.115936	-0.136194	0.000060	0.312648	-0.054004	0.308008
X3	0.298642	0.115936	1.000000	0.830097	0.687315	0.624224	0.545236	0.483084
X4	0.276768	-0.136194	0.830097	1.000000	0.773529	0.587928	0.683204	0.384777
X5	0.470969	0.000060	0.687315	0.773529	1.000000	0.811200	0.706777	0.508543
X6	0.579308	0.312648	0.624224	0.587928	0.811200	1.000000	0.606673	0.644204
X7	0.420446	-0.054004	0.545236	0.683204	0.706777	0.606673	1.000000	0.364754
X8	0.491089	0.308008	0.483084	0.384777	0.508543	0.644204	0.364754	1.000000

The multicollinearity test table shows no correlation between the independent variables greater than 0.90 (Ghozali, 2011).

The Heteroscedasticity test results are shown in Table 7 below:

Table 7
Heteroscedasticity test

F-statistic	1.474745	Prob. F(13,100)	0.1789
Obs*R-squared	11.44974	Prob. Chi-Square(13)	0.1775
Scaled explained SS	14.84986	Prob. Chi-Square(13)	0.0621

A heteroscedasticity test was performed using the Harvey method. The heteroscedasticity test table shows that the value of Prob. Chi-Square of 0.1775 was greater than the significance level of 0.05,

which means that the data do not show heteroscedasticity.

The results of the autocorrelation test are shown in Table 8 below:

Table 8
Autocorrelation test

F-statistic	0.255729	Prob. F(2,97)	0.7750
Obs*R-squared	0.578088	Prob. Chi-Square(2)	0.7490

The autocorrelation test table shows that the value of Prob. Chi-Square of 0.7490 was greater than the significance level of 0.05, which means no autocorrelation was detected. The whole test indicates that there

are no deviations from the classical assumptions in the model or data.

The results of the goodness of fit test are shown in Table 9 below:

Table 9
The goodness of fit test

Variables	Coefficient	Std. Error	t-Statistic	Prob.
Y	9.094837	13.564490	0.670489	0.50510
X1	0.012001	0.003792	3.164554	0.00240
X2	0.009098	0.005200	1.749632	0.08520
X3	0.015182	0.011085	1.369553	0.17580
X4	0.050746	0.147268	0.344582	0.73160
X5	0.009205	0.005636	1.633178	0.10760
X6	-0.008485	0.007998	-1.060892	0.29290
X7	-0.002585	0.002956	-0.874389	0.38530
X8	-0.004975	0.003111	-1.599146	0.11500

Cross-section fixed (dummy variables)

R-squared	0.983177	Mean dependent var	15.227670
Adjusted R-squared	0.974903	S.D. dependent var	1.146886
S.E. of regression	0.181690	Akaike info criterion	-0.310030
Sum squared resid	2.013690	Schwarz criterion	0.539703
Log likelihood	45.261370	Hannan-Quinn criter.	0.032930
F-statistic	118.830900	Durbin-Watson stat	1.736902
Prob(F-statistic)	0.000000		

From the goodness of fit test in the above table, the F probability value is smaller than the significance level ($0.0000 < 0.05$), which means that all the independent variables collectively affect the dependent variable. Thus, this model is appropriate to explain the effect between the independent variable and the dependent variable. The adjusted r-squared value of 97.49% indicates the proportion of partial influence from the independent toward dependent variables; other factors outside the model influence the remaining 2.51%.

The t-test can be observed from the probability value of each variable. If the value is less than 0.05, the variable significantly affects the dependent variable simultaneously, and vice versa if the t-value is greater than 0.05. The selected FEM results state that only the X1 variable, or Family Friendly Destination, significantly impacts foreign tourist visits to countries incorporated in the OIC.

Based on the goodness of fit test table for the FEM model, the following equation is obtained by excluding the independent variables that simultaneously do not have a significant effect on the dependent variable:

$$Y = 9.094837 + 0.012001 * X1$$

The above equation obtained through multiple linear regression can be interpreted as follows:

1. A constant value of 9,094 presents the arrival numbers of foreign tourists/inbound (Y). By assuming the Family Friendly Destination (X1) variable is equal to zero or constant, then the number of inbound will be 9,094 (constant).
2. The Family Friendly Destination (X1) coefficient of 0.012 asserts that every positive increase in X1 is a unit. Therefore, the Y variable will increase by 0.012 units; an increase of X1 will increase the Y value and vice versa.

Analysis

The impact of Muslim friendly tourism indicators and dominant influence on the number of foreign visitors traveling to countries incorporated in the Organization of Islamic Cooperation (OIC)

The eight independent variables on GMTI affect the dependent variable (foreign tourists traveling to OIC countries) by 97.49%, while other variables outside the research investigations influence 2.51%. This number indicates that the Muslim-friendly attribute affects the destination's quality and has an essential role in

influencing the number of visits. The higher the GMTI score, the higher the number of foreign tourists visiting the destination. Otherwise, if the GMTI score decreases, the number of foreign tourists visiting the destination will experience a decline.

This study looked at the significance of independent variables individually or simultaneously. The results showed that only one of the eight indicators had a significant effect on the foreign tourist arrivals; the Family Friendly Destination variable has an effect of 0.012 on the visitor numbers.

International Muslim Tourists and Muslim Attributes in Destinations

The foreign tourists' arrival implication agrees with the initial assumption that foreign tourists' number affects foreign exchange. In this study, tourism data from OIC member countries shows that foreign exchange from foreign tourists' spending grew by 21% in less than five years, and tourists' expenditure deemed foreign tourist exchange also experienced a growth of 8.1% during the same period.

This finding shows that the foreign tourist exchange by tourists visiting OIC member countries shows a positive trend even though the value is not comparable to the foreign tourists spending at the destination.

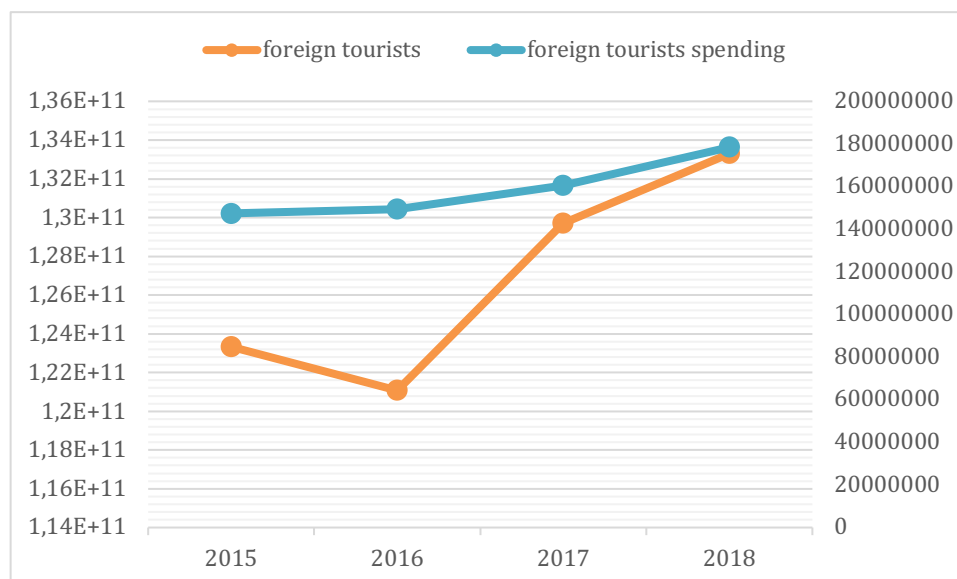


Figure 2. Growth comparison between foreign tourists and foreign tourists spending from 2015-18 (World Bank, 2020a, 2020b)

All tourists, including non-Muslim tourists, need the Family Friendly Destination indicator. Family-Friendly

Destination is a concept that can be accepted by people from all walks of life. This feature is also a very familiar criterion and can

attract almost all foreign tourists from various backgrounds. A flourishing tourism income is formed if the economic situation is conducive, safe, progressive, and fluid (Santamaria & Filis, 2019). Therefore, the Family Friendly Destination indicator is proven to increase foreign tourists' arrivals at the destination.

The estimated Muslim population in 2020 will touch 1.9 billion or 25% of the world's total population. In 2050, the number will increase further to 2.8 billion, representing 30% of the world's population (Pew-Templeton, 2015). For now, there are about 25% of the total global tourists who might recognize and need Muslim attributes when they travel, while the remaining 75% do not take advantage of these attributes.

Although many Muslim countries are now developing Muslim friendly tourism, its attribute does not negatively impair non-Muslim tourists. The present study shows that all indicators excluding the Family Friendly Destination variable are only needed by foreign tourists who embrace Islam. In comparison, Muslim tourists only view Bali Island as a Family Friendly Destination. However, Bali is a peaceful destination for families and Hinduism devotions for Hindu people. Bali's attributes as a destination will be interpreted as a spiritual value to those who believe.

According to Han et al. (2019) hospitality industry managers and governments in non-Muslim countries faced challenges in developing facilities that effectively target Muslim tourists' needs. These facilities include accommodation, food and beverage, public transportation, and attractions. Their judgments are somehow dubious because many non-Muslim tourists crave a healthy lifestyle and have a high social tolerance for Halal aspects and Muslim attributes. The criteria adopted for developing Muslim-friendly facilities have a selling point and do not bring a dilemma for non-Muslim tourists since the concept of sharia accommodation would never work against moral norms. Therefore, the market for Islamic-friendly tourism will always continue to grow (Stephenson, 2014). The tourism sector relies upon demand; when the request is met, the destination's economy will progress (Santamaria & Filis, 2019). This study proves that foreign tourists' demand undoubtedly influences foreign tourists' arrival numbers at the destination.

Should the program properly executed, market development targeting Muslim-friendly tourism will be increasing Muslim tourists and its functions in meeting the needs of the Halal tourism segment (Yousaf & Xiucheng, 2018). Considering that the Muslim-friendly tourism market is

attractive, hospitality players in the tourism sector who are fully committed to developing Muslim-friendly tourism must be vigilant in employing their resources so that the expected tourism concept could efficiently target the right customers.

III. Conclusion

Although the eight independent variables from the GMTI indicator significantly impact the number of foreign tourists traveling to countries incorporated in the Organization of Islamic Cooperation (OIC), only the Family Friendly Destination variable has a significant impact simultaneously. This judgment relies on the fact that the current number of Muslim tourists is low compared to the total global travelers; thus, the maximization of Muslim attributes offered in destinations lacks. Although the recent exercise of Muslim attributes in destinations seems to be less effective, this market locus must be considered valuable due to its potential.

The desire-gap between the present facilities offered by regular destinations and Muslim tourists' needs is influenced by demographic, socio-economic, and psychological changes in a particular area. If the tourism industry fails to compete with other sectors due to the slovenliness of planning, tourism growth may slow down and even experience a total free-fall from its

initial point. The central concept of developing Muslim friendly tourism should not solely see the growth rate of Muslim tourists as a goal. Tourism players must always examine changes in market trends and demand for maturing their Halal-concept properties since this market is widely accepted by people from all walks of life, including those with no knowledge of Islam.

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