

Indonesia Sharia Economic Festival

Wonderful Halal Tourism Outlook

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Ministry of Tourism



The 6th ISEF



Presentation Overview

TALKING POINTS

Indonesia Tourism Performance
Issues & Trends
Opportunity & Challenges



“

SOMETHING TO THINK ABOUT

“Muslims are the fastest growing consumer segment in the world. Any company that is not considering how to serve them is missing significant opportunity to affect both its top and bottom line growth”

~ AT Kerney's 2008 report addressing the muslim market – can you afford not to?

Indonesia's Tourism Performance

- ❑ General Performance
- ❑ Halal Tourism Performance



General Performance

Indonesia International Growth vs Regional & Global

Acknowledgements of Wonderful Indonesia Branding

TTCI Ranking



Indonesia International Growth vs Regional & Global



Indonesia	12,58 % (January – December 2018)
Vietnam	19,90 % (January – December 2018)
Malaysia	-0,45 % (January – December 2018)
Singapore	6,21 % (January – December 2018)
Thailand	8,28 % (January – December 2018)

Source: Countries' Own Statistics

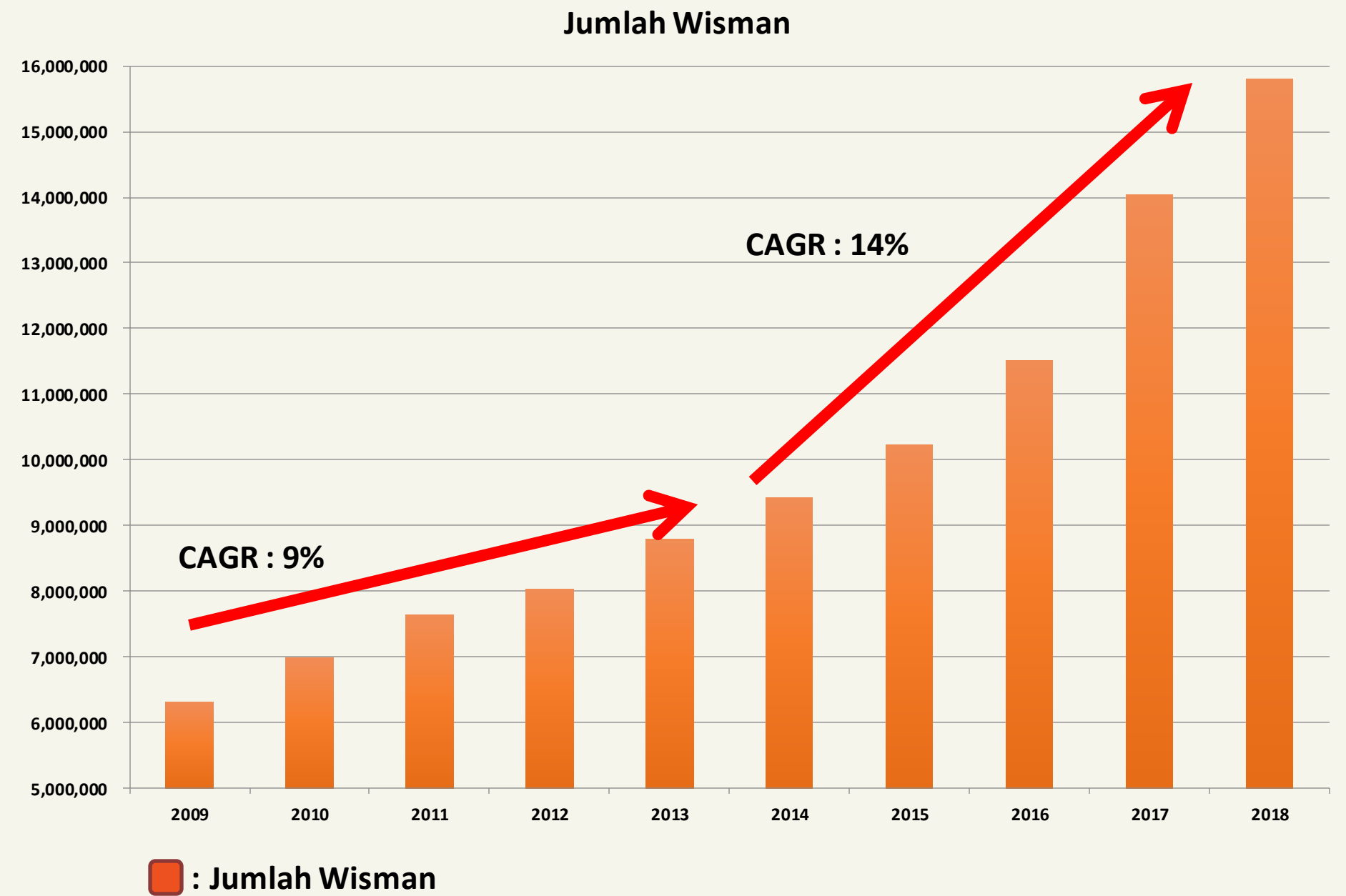
The Growth of Tourist Arrival

2009 - 2018

The Average Growth (CAGR) of tourist arrival is increased, from 9% within 2009-2013 period to 14% within 2014-2018 period.

Year	Number of Visitor (Mio)
2009	6,32
2010	7,00
2011	7,64
2012	8,04
2013	8,80
2014	9,43
2015	10,23
2016	11,52
2017	14,04
2018	15,81

Sumber: Badan Pusat Statistik



ACKNOWLEDGEMENT OF WONDERFUL INDONESIA BRANDING

In 2016, wonderful indonesia received 46 awards in many events that took place on 22 countries



In 2017, wonderful indonesia received 27 awards in many events that took place on 13 countries



In 2018, wonderful indonesia received 66 awards in many events that took place on 15 countries



Until august 2019, Wonderful Indonesia indonesia received 66 awards in many events that took place on 15 countries



INDONESIA RANKING

on Travel and Tourism Competitiveness Index (TTCI) by World Economic Forum (WEF)

DASH OFF!!

From rank **70** on 2013, become rank **40** on 2019



Halal Tourism Performance

GMTI Ranking

Priority Destinations of Indonesia Halal Tourism

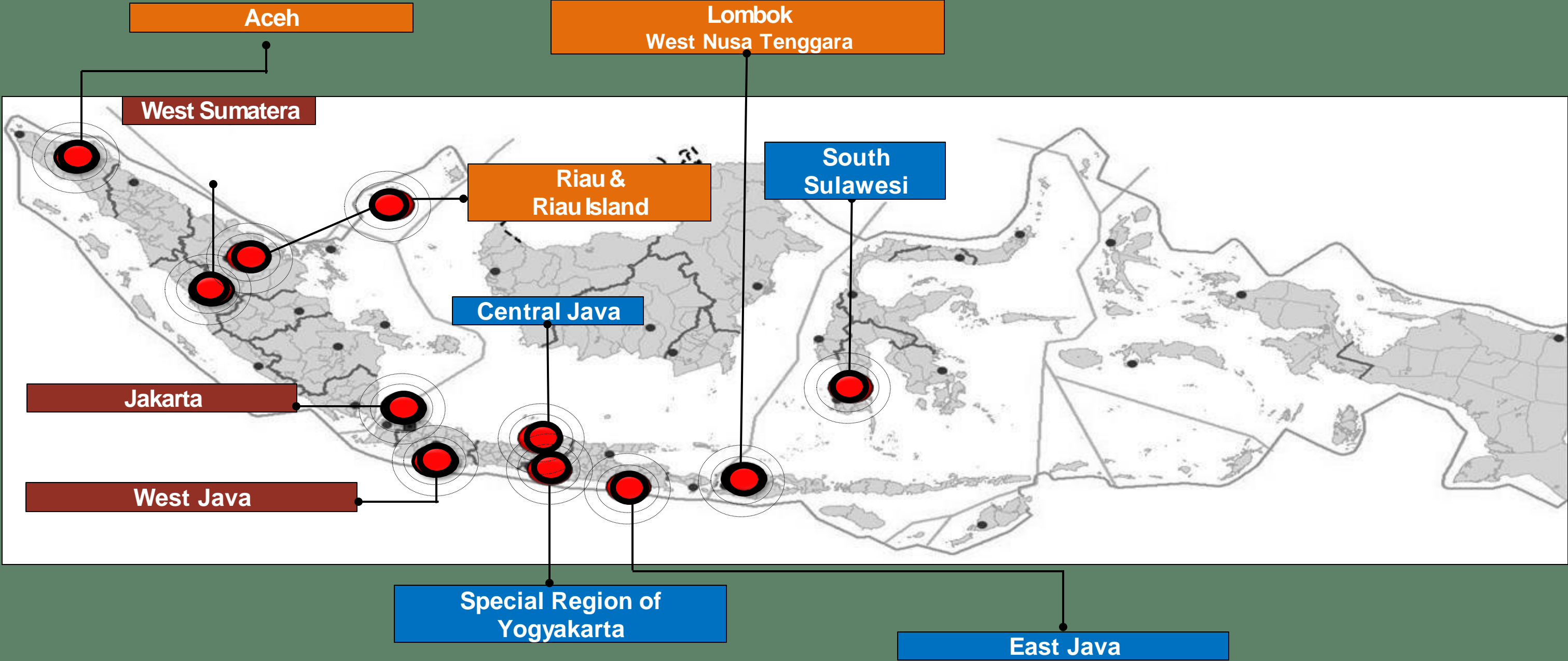


Milestone of Indonesia

On Global Muslim Travel Index



Priority Destinations of Indonesia Halal Tourism



Issues & Trends

- ❑ Perspectives of Halal Tourism
- ❑ Global Tourism Outlook
- ❑ The Growth of Halal Tourism



Perspectives of Halal Tourism



The Perspectives of Halal Tourism

“... using the terms ‘Islamic’ and ‘Halal’ as if they have similar meaning is inappropriate. It would be better to use ‘Halal’ as brand name rather ‘Islamic’ for any related product and service in tourism industry

~Mohamed Battour, & Mohd Nazari Ismail: July 2016

Source: Halal tourism: Concepts, practises, challenges and future, Elsevier Scopus

The Perspectives of Halal Tourism

*Halal Tourism is a set of an **extended Services of Amenities, Attractions and Accessibilities** intended to deliver and fulfill **Muslim Travellers' Experiences, Needs and Wants.***

(Sutono: March 15th, 2019)

Pariwisata Halal adalah seperangkat **layanan tambahan Amenitas, Atraksi dan Aksesibilitas** yang ditujukan dan diberikan untuk memenuhi **Pengalaman, Kebutuhan dan Keinginan wisatawan muslim.**

(Sutono: 15 Maret, 2019)

Global Tourism Trends





100% HOTEL SHOW

- HOME
- INDUSTRY SECTORS »
- INVESTMENTS »
- BRIEF NEWS
- PEOPLE »
- ATHENS
- NORTHERN GREECE
- EVENT NEWS »
- GTP NETWORK »



Industry Forecast: 2020 World Travel & Hotel Rates to Slow Down

Posted On 06 Aug 2019 By : GTP editing team Comment: 0

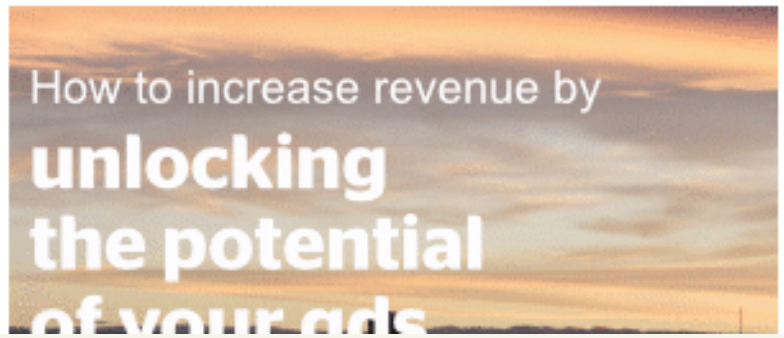


Home > Surveys, Trends & Stats > Industry Forecast: 2020 World Travel & Hotel Rates to Slow Down

NEWSLETTER »

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Global Tourism Trends



With increasing economic and political uncertainty in many of **Australia's key inbound tourism markets**, growth in international arrivals has moderated, increasing by **4.9 per cent in 2018**, compared to the **7.5 per cent average growth over the past three years**. Nonetheless, inbound arrivals now exceed 9.0 million for the first time, with Australia welcoming 9.2 million international visitors in 2018. This is up by 65 per cent, or 3.6 million additional visitors, over the past decade.

With the exception of India and Japan, the growth in arrivals from across Australia's top ten source markets has been slower over the past year compared to the average over the past five years. Growth in **visitor arrivals from China has slowed significantly**, recording **5.5 per cent growth last year** relative to an average annual growth rate of **14.7 over the past five years**.

Arrivals from both the **UK and US were sluggish last year**, up **0.1 per cent and 0.9 per cent respectively**.

Arrivals from India however grew strongly again, up 18.2 per cent over 2018 adding further momentum to the growth seen over the last five years. India overtook Korea as our eighth largest visitor base in 2017.

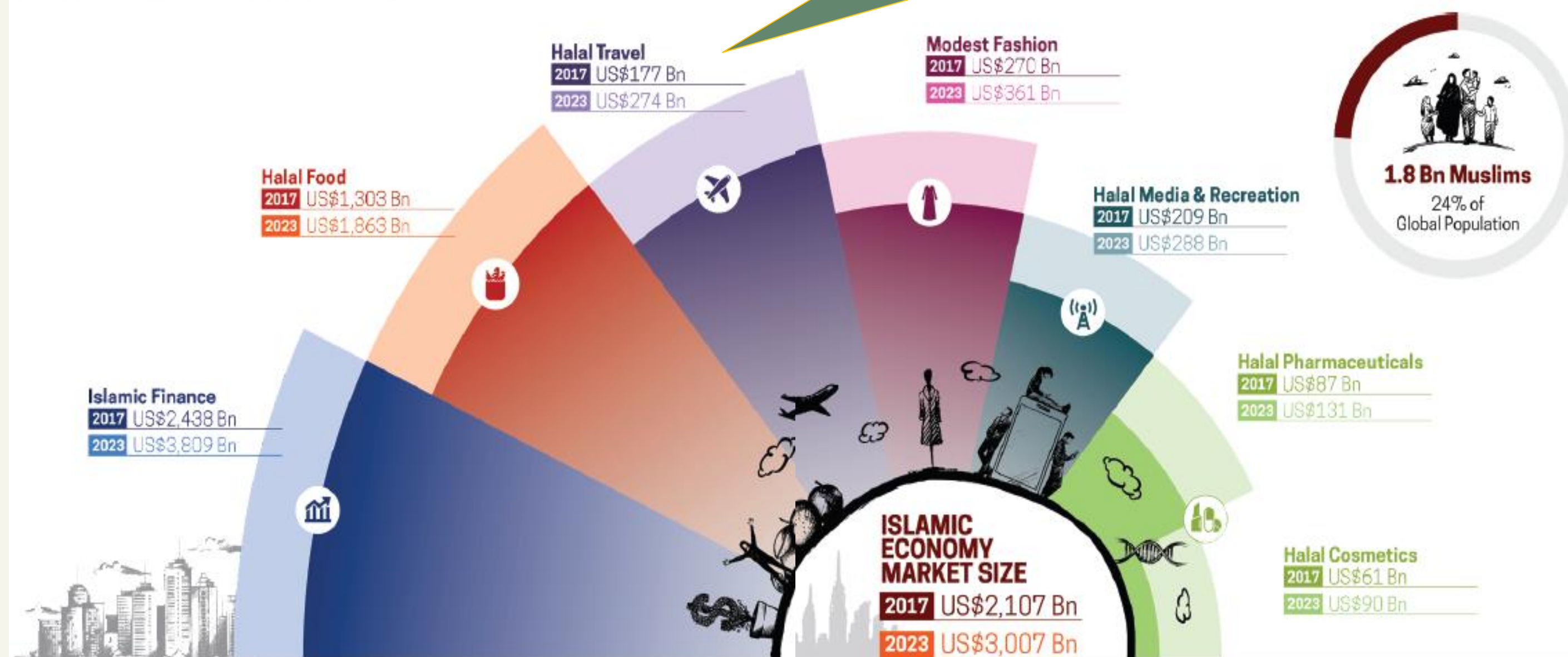
The Growth of Halal Tourism



Halal Travel Trends

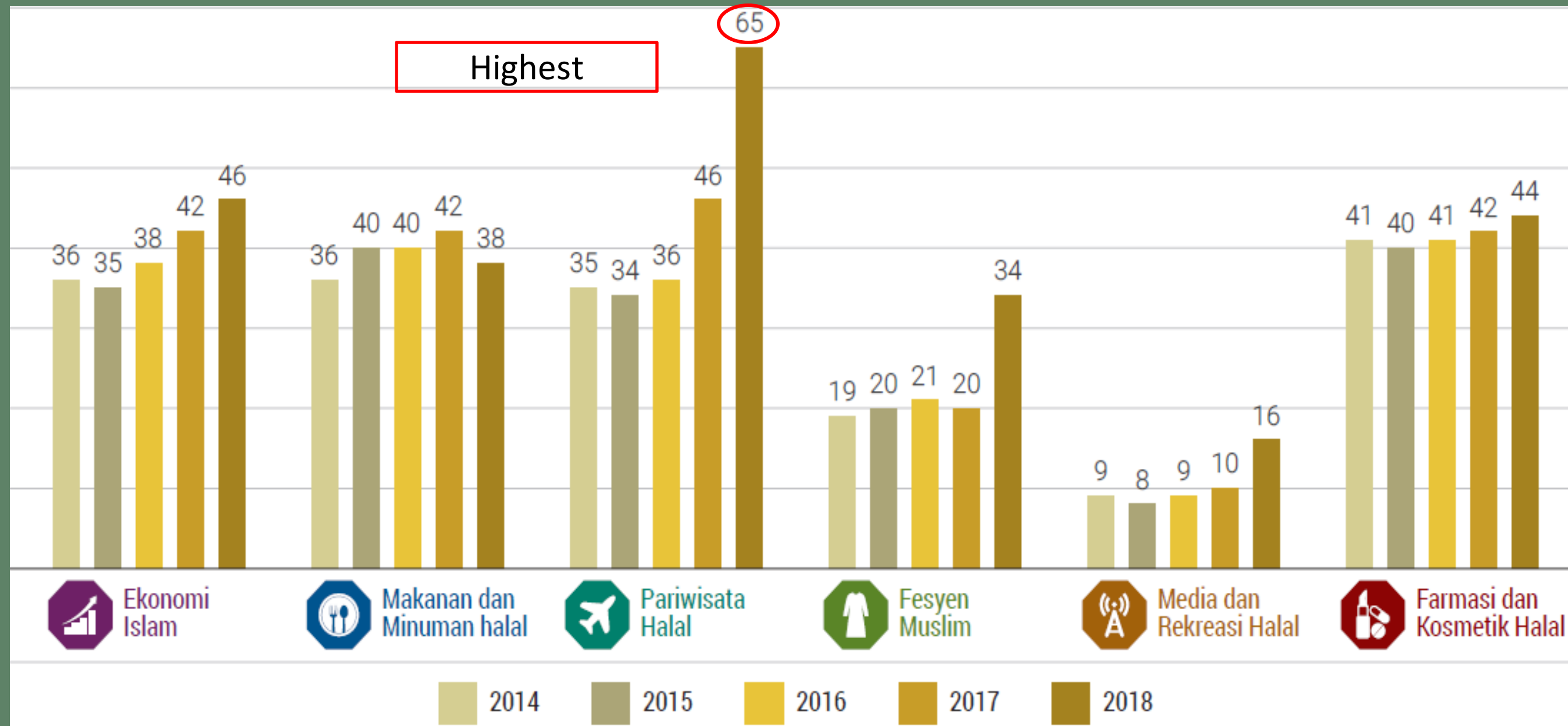
Halal Travel 2017 \$177 Bn equal Rp. 2,500 T
 →→ →→ 2023 \$274 Bn equal Rp. 3,800 T

Global Islamic Economy



Source : SGIE Report 2018/19

The Comparison of Growth Among Halal Industries in Indonesia 2014-2018



Sumber; SGIE Report 2018 – Masterplan Ekonomi Syariah 2019-2024



crescent
accelerating

MUSLIM TRAVEL MARKET GROWTH PROJECTIONS

ENABLING DIGITAL TECHNOLOGIES ACCELERATING GROWTH



DISRUPTIVE DIGITAL TECHNOLOGIES AND TRAVEL LANDSCAPE

MASTERCARD-CRESCENTRATING GLOBAL MUSLIM TRAVEL INDEX (GMTI) 2019

#GMTI2019

Opportunity & Challenges

- ❑ Strategic Plan of Halal Tourism
- ❑ 9 key initiatives of Halal Tourism Development



Opportunity & Challenges

MODERN NOMADISM

PAGE 5

The growing freelance movement is liberating professionals from the shackles of nine-to-five working. As people take overseas sabbaticals and set off on round-the-world adventures, hotels are also embracing no-fixed-abode concepts



CASH-FREE CULTURE

PAGE 7

Paper notes and coins are soon to be a thing of the past. As travellers increasingly rely on mobile banking, smart devices and cryptocurrencies, businesses need to ensure they are equipped to take their money



CYBER WORLDS

PAGE 9

As virtual reality comes of age, and offline experiences digitise, a compelling new medium that blends technology with immersive theatre is generating new reasons to travel, especially among Generation Z



CASTAWAY ISLANDS

PAGE 11

Long-suffering urbanites crave a Robinson Crusoe existence but thousands of the world's islands are at risk of being submerged by rising sea levels. A new wave of private resorts are welcoming guests while they can

BIOMETRICS & BIOHACKING

PAGE 13

Facial recognition is transforming the way passengers move seamlessly through airports, making boarding passes and physical immigration checks redundant. But human microchipping is the bleeding-edge innovation to scrutinise



SPACE TOURISM

PAGE 15

In all of history, only 536 people have ever been into space and just 12 have walked on the moon. But that is set to change as private companies vie to take regular paying Earthlings off-world on their very own rocket ships



UPSKILLING ESCAPES

PAGE 17

Whereas experiential travel granted people bragging rights around the dinner table, and transformational travel inspired them to disconnect, going away to learn new skills will be the motivating force behind betterment trips of the new decade



ULTRA HIGH SPEED

PAGE 19

For the first time since Concorde, supersonic flight is making a comeback, meaning that having breakfast in London and lunch in Vancouver will soon become a reality. Equally, super-fast trains are transforming overland options for city-breakers of tomorrow

CANNABIS TOURISM

PAGE 21

The green economy is opening up higher ways of being for holidaymakers looking to turn on, tune in and drop out, if only for a week. Cannabis tourists can look forward to luxury CBD spa treatments, marijuana fine-dining, weed tours and even stylish mega dispensaries

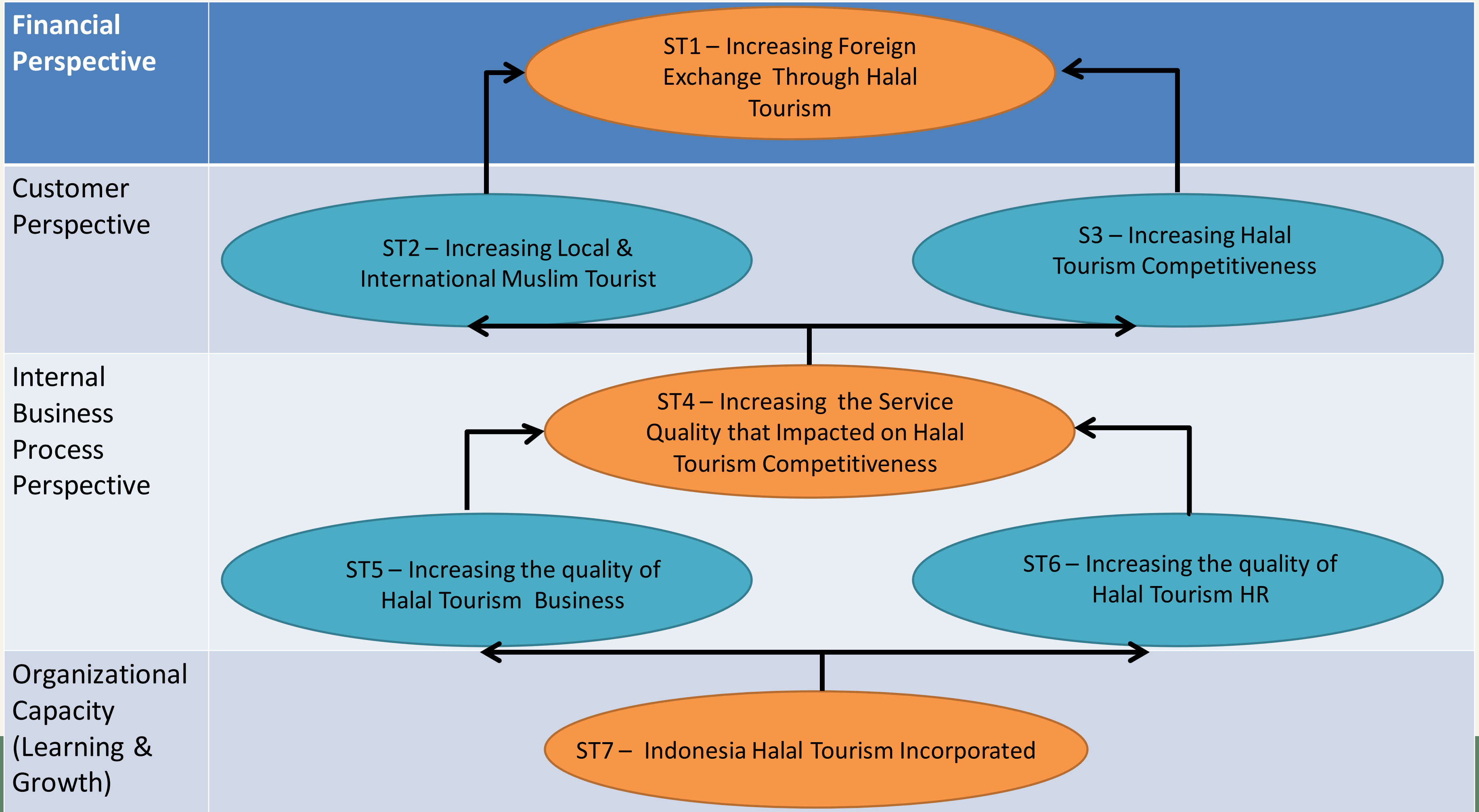


CHINESE DOMINATION

PAGE 23

China is about to surpass the US as the world's biggest economy. Shunning groups in favour of individual travel, Chinese millennials are breaking away from the norm and looking for destinations in which to spend their newly acquired wealth





Strategic Target	Indicator	Year					
		2019	2020	2021	2022	2023	2024
ST1 – Increasing Foreign Exchange Through Halal Tourism	Average Spending Per-Arrival (USD)	1.465	1.509	1.554	1.601	1.649	1.698
ST2 – Increasing Local & International Muslim Tourist	Increasing Numbers of International Muslim Tourism Arrival	3,6 Mio	4 Mio	4,5 Mio	5 Mio	5,5 Mio	6 Mio
	Increasing Numbers of National Muslim Tourism Travel	1,85%	2%	2,50%	3%	3,50%	4%
S3 – Increasing Halal Tourism Competitiveness	Halal Tourism Index Ranking (GMTI)	1	1	1	1	1	1
ST4 – Increasing the Service Quality that Impacted on Halal Tourism Competitiveness	Competitiveness of Services in International Index Ranking (Services aspects in GMTI)	77,8	81	85	89	93	97
ST5 – Increasing the quality of Halal Tourism Business	Growth of Certified Halal Tourism Industry	5%	20%	50%	100%	100%	100%
ST6 – Increasing the quality of Halal Tourism HR	Growth of Certified Halal Tourism HR	n.a	150%	150%	100%	100%	75%
ST7 – Indonesia Halal Tourism Incorporated	Guidance of Halal Tourism	4	5	6	7	8	9
	Commitment of Halal Tourism	16	20	23	25	27	34

100 promises of president related halal tourism

Nawa Cita

RPJMN 2020 - 2024

RIPPARNAS



STRATEGIC PLAN OF HALAL TOURISM

Vision: "Indonesia as The World Class Halal Tourism Destination"

Current Target

- Muslim Visitors Expenditures (4,5B)
- Muslim Visitor (3,6M)
- Halal Tourism Incorporated (16 MoU)
- GMTI (Rank no 1)
- Industry Competitiveness (77,8)
- National muslim tourism movement (240 M)

2024 Target

- Muslim Visitors Expenditures (7,6B)
- Muslim Visitor (6M)
- Halal Tourism Incorporated (16 MoU)
- GMTI (Rank no 1)
- Industry Competitiveness (77,8)
- National muslim tourism movement (265 M)

- Pillars
- Target
- Indicator
- Strategy

Destination Development

Marketing Development

Industrial and Institutional Development

Halal Tourism Competitiveness Index

Foreign Exchange

Business Competitiveness & Institution Performance

International Index Ranking

Muslim Visitors

Competitiveness of Services Index

Destination (3A)

S1 - Amenity: to develop muslim friendly fascility and services, and encourage halal tourism investment climate.

S2 - Attraction: to develop Muslim friendly attraction.

S3 - Accessibility: to develop connectivity towards halal tourism destination.

Marketing (Digital)

S4 – Marketing (DOT): to match the marketing based on DOT (destination, origin, dan time) and preferences from muslim travel market.

S5 – Promotion (BAS): to develop marketing communication and selling of halal tourism.

S6 – Media (POSE): to develop halal tourism digital media promotion.

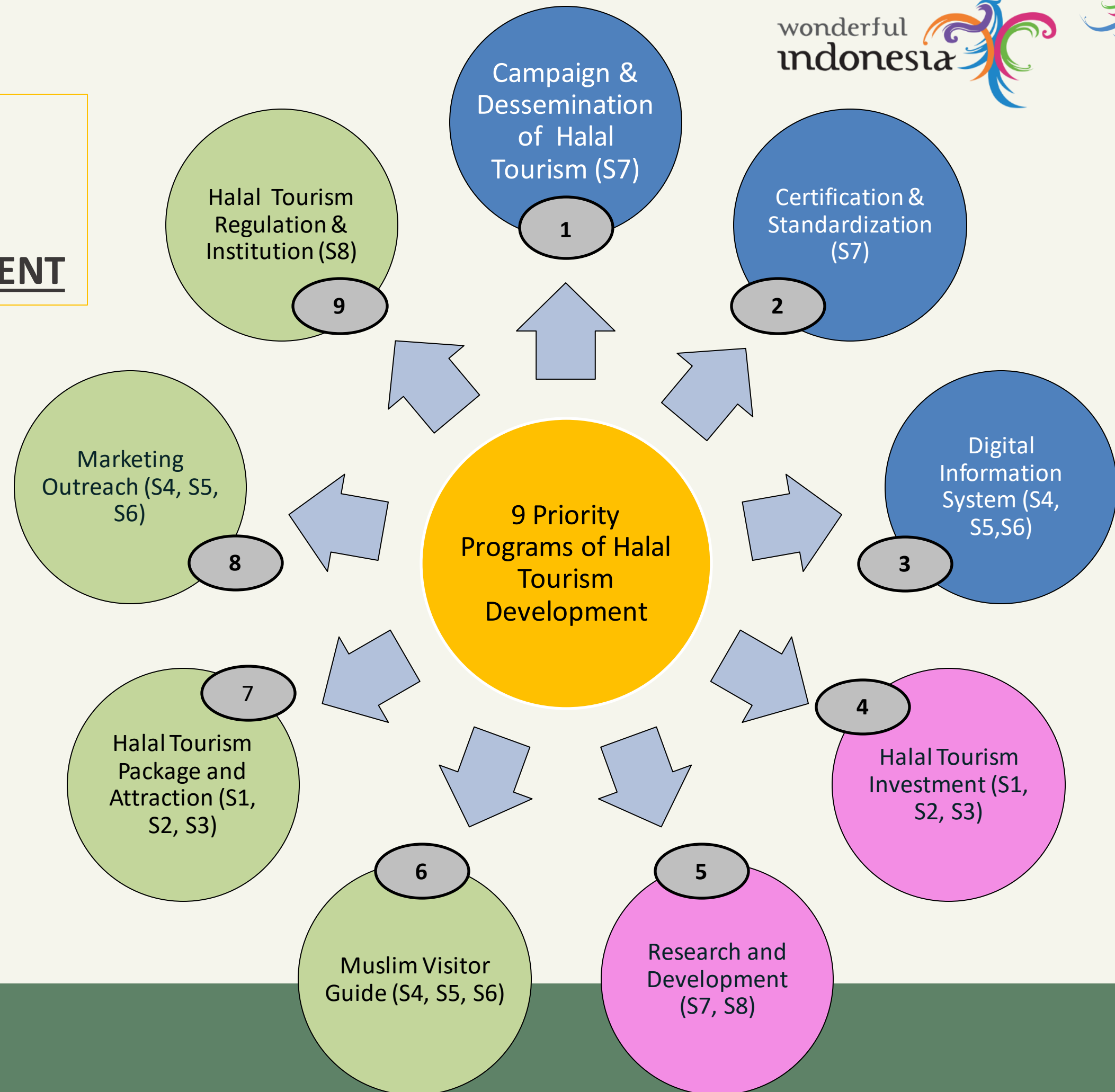
HR, Community & Industry

S7 – Human Resource Development: To increase human resource quality and quantity of halal tourism through 3C (Curriculum, Certification, Center of Excellence).

S8 – Community: Strengthen the policy and institutional structure, synergize the stakeholders, Certification, Research and Development, dan traceability system for halal tourism.

S9 - Industrial Development: To Increase the competitiveness of industry through product development of muslim friendly tourism (extended services).

TOP 9 PRIORITY PROGRAMS OF HALAL TOURISM DEVELOPMENT





HATUR NUHUN

TERIMA KASIH