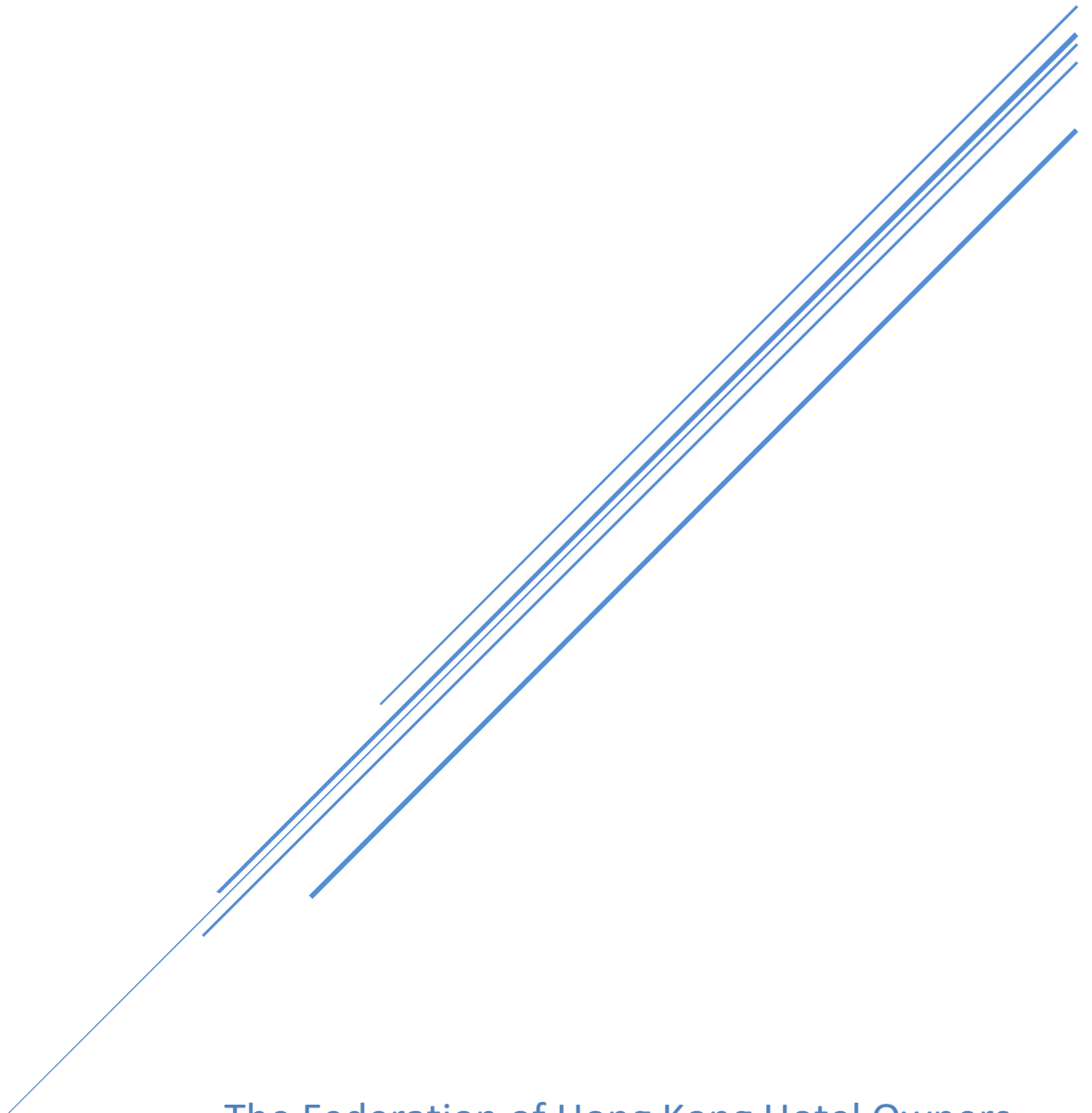


ENHANCING HONG KONG'S READINESS FOR MUSLIM-FRIENDLY TOURISM:

Industry Perspectives and Strategic Directions



The Federation of Hong Kong Hotel Owners
June 2026

Enhancing Hong Kong's Readiness for Muslim-Friendly Tourism: Industry Perspectives and Strategic Directions

Executive Summary

Hong Kong has made substantial progress in positioning itself as a Muslim-friendly destination, but it remains in a development and conversion phase rather than a mature leadership phase. In the 2025 Mastercard-CrescentRating Global Muslim Travel Index (GMTI), Hong Kong ranked **3rd among non-OIC destinations** and was named the “**Most Promising Muslim-Friendly Destination of the Year.**” The GMTI also reported that international Muslim arrivals reached **176 million in 2024** and are projected to rise to **245 million by 2030**, underlining the strategic significance of the market.

Hong Kong's broader tourism base strengthened further in 2025. The Hong Kong Tourism Board (HKTB) announced provisional full-year visitor arrivals of **49.9 million**, including **37.8 million Mainland visitors** and **12.1 million non-Mainland visitors**. HKTB also reported that the average length of stay for overnight visitors was **3.1 nights**, and overnight visitors rated their satisfaction with Hong Kong at **8.9 out of 10**. Markets including the **Middle East** recorded year-on-year growth of **25% or more**, while arrivals from short-haul markets including **India** matched or surpassed pre-pandemic levels.

Within Hong Kong's Muslim-related visitor base, **India, Malaysia, and Indonesia** remained the principal source markets in 2025, while the **GCC** continued to represent a smaller but faster-growing premium segment. According to HKTB's December 2025 Visitor Arrival Statistics, arrivals from **India** increased from **377,792 in 2024 to 416,978 in 2025 (+10.4%)**, **Malaysia** from **405,508 to 430,139 (+6.1%)**, and **Indonesia** from **366,973 to 381,530 (+4.0%)**. By contrast, **GCC markets** rose from **16,498 to 29,478 (+78.7%)**, but remained small in absolute size. This pattern suggests that Hong Kong's Muslim-friendly tourism strategy still rests primarily on scalable Asian markets, while Gulf markets remain a higher-value but narrower segment requiring more targeted development.

Supply-side readiness has also improved materially. HKTB's 2024/25 Annual Report states that by March 2025, more than **160 restaurants** had obtained halal certification, while **55 hotels and 5 attractions and MICE venues** had secured CrescentRating accreditation. HKTB also highlighted Hong Kong's rise from fourth to third in the GMTI non-OIC category in 2025.

Yet progress in accreditation and branding has outpaced progress in market capture. The policy challenge is no longer whether Hong Kong should pursue Muslim-friendly tourism; that case is already established. The more pressing issue is whether the city can convert its structural strengths—connectivity, safety, hotels, retail, dining, and urban convenience—into a trusted, seamless, end-to-end Muslim-friendly visitor experience. This requires more than halal food. It also requires prayer convenience, hotel readiness, clearer public-facing trust signals, stronger family-oriented evening offerings, and more precise market segmentation.

1. Introduction

Muslim-friendly tourism has become an increasingly important strategic segment in global travel. Its growth reflects population dynamics, rising incomes, expanded air connectivity, digitally informed trip planning, and demand for destinations that can accommodate religious practice without compromising leisure or business quality. What was once treated as a niche market is now better understood as a mainstream growth segment with implications for aviation, hospitality, retail, MICE, and destination branding.

For Hong Kong, the issue is important for several reasons. First, it supports **source-market diversification**, which is increasingly relevant to tourism resilience. Second, it aligns with Hong Kong's wider economic interest in deepening ties with **ASEAN, India, and the Middle East**. Third, it offers a route to attracting more **overnight, family, premium, and business travellers**. Fourth, many improvements designed for Muslim travellers—clearer food assurance, multilingual information, better facility planning, and family-sensitive services—also improve the destination experience for other visitors.

Hong Kong already possesses strong tourism fundamentals: a major international airport, a dense urban visitor economy, established hotel capacity, efficient transport, and a strong MICE base. The policy question is therefore not whether Hong Kong can attract visitors in general, but whether it can convert those strengths into a credible and convenient Muslim-friendly destination proposition.

2. Global Market Opportunity

The market opportunity is substantial. According to the 2025 Mastercard-CrescentRating GMTI, international Muslim arrivals reached **176 million in 2024**, up **25%** from 2023, and are projected to reach **245 million by 2030**. This positions Muslim travel as one of the most dynamic structural growth segments in international tourism.

The significance for Hong Kong is heightened by geography. Many of the most commercially relevant Muslim travel markets are in Asia, particularly **Indonesia, Malaysia, and India**, while the Gulf offers a smaller but potentially higher-spending premium segment. For Hong Kong, therefore, the opportunity is not only about visitor volume but also about market quality, including family groups, longer stays, business and MICE demand, luxury retail consumption, and higher-value hospitality spending. This is an inference drawn from HKTB's source-market pattern and the market structure highlighted in the GMTI.

Table 1. Key Headline Indicators

No.	Indicator	Latest figure	Policy significance
1	Global Muslim international arrivals	176 million (2024)	Confirms large and expanding demand base
2	Projected Muslim international arrivals	245 million (2030)	Indicates strong medium-term growth
3	Hong Kong total visitor arrivals	49.9 million (2025)	Confirms strong tourism recovery base
4	Hong Kong non-Mainland arrivals	12.1 million (2025)	Relevant to diversification strategy
5	Hong Kong GMTI non-OIC rank	3rd (2025)	Signals growing international recognition
6	Hong Kong GMTI distinction	Most Promising Muslim-Friendly Destination of the Year (2025)	Indicates strongest improvement among non-OIC destinations
7	Halal-certified restaurants in Hong Kong	160+ by March 2025	Reflects expansion of usable supply
8	CrescentRated hotels in Hong Kong	55 by March 2025	Indicates stronger hospitality readiness

Source: compiled from Mastercard-CrescentRating GMTI 2025 and HKTB Annual Report 2024/25.

3. Hong Kong's Tourism Base and Current Market Position

Hong Kong's overall tourism recovery strengthened further in 2025. HKTB announced provisional full-year arrivals of **49,894,832**, compared with **44,502,787** in 2024, representing **12% year-on-year growth**. The 2025 total included **37,833,784 Mainland visitors** and **12,061,048 non-Mainland visitors**, confirming that Hong Kong remains a large-capacity destination with substantial recovery momentum. HKTB also reported that overnight visitors stayed an average of **3.1 nights** and rated their satisfaction with Hong Kong at **8.9 out of 10**.

Within the non-Mainland market, Hong Kong's Muslim-related visitor base remained concentrated in a small number of Asian markets, with **India, Malaysia, and Indonesia** forming the core. By contrast, the **GCC** remained much smaller in absolute volume, even though it is often discussed as a higher-value strategic market. This distinction matters: Hong Kong is not dealing with a single Muslim travel market, but with several segments that differ in scale, spending profiles, and service expectations.

Table 2. Main Muslim-Related Source Markets for Hong Kong, 2024–2025

No.	Source market	2024 arrivals	2025 arrivals	Growth 2025 vs 2024	Strategic reading
1	India	377,792	416,978	+10.4%	Largest of the key Muslim-related markets in absolute terms; also important for business and hybrid leisure demand
2	Malaysia	405,508	430,139	+6.1%	One of Hong Kong's strongest Muslim-majority short-haul markets, with repeat-visit potential
3	Indonesia	366,973	381,530	+4.0%	Important Muslim family and leisure market, though growth was more moderate in 2025
4	GCC markets*	16,498	29,478	+78.7%	Fastest growth rate, but from a very small base; remains a niche segment in volume terms

* GCC markets include Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.

Source: HKTB, *Monthly Report – Visitor Arrival Statistics: Dec 2025*.

Three points follow from Table 2. First, **India remained the largest of Hong Kong's principal Muslim-related source markets**, rising from **377,792 arrivals in 2024** to **416,978 in 2025**. This confirms India's strategic importance not only because of its large Muslim population, but also because of its wider value as a business, leisure, and MICE market. Second, **Malaysia and Indonesia remained the key Muslim-majority Southeast Asian pillars** of Hong Kong's Muslim-friendly tourism strategy. Their continued growth confirms their importance for scale, but also suggests that future gains will depend increasingly on better conversion through stronger halal convenience, family-friendly packaging, and repeat-visit appeal. Third, the **GCC market grew fastest in percentage terms**, but from a very small base. Gulf demand is clearly improving, yet it has not become a large-scale pillar of Hong Kong's Muslim tourism economy.

Further supporting data on source-market performance and destination benchmarking are provided in **Appendix Table A1** and **Appendix Table A2**.

4. Hong Kong's Progress in Muslim-Friendly Destination Development

Hong Kong has made visible progress in accreditation, promotion, and ecosystem-building. The most prominent external signal is its performance in the 2025 GMTI, in which it ranked **3rd among non-OIC destinations** and received recognition as the **Most Promising Muslim-Friendly Destination of the Year**.

This recognition has been accompanied by concrete supply-side expansion. HKTB's 2024/25 Annual Report states that by March 2025, more than **160 restaurants** in Hong Kong had obtained halal certification, up from around **100** at the beginning of 2024. In the same period, **55 hotels** and **5 attractions and MICE venues** had secured CrescentRating accreditation.

These developments indicate that Hong Kong has moved beyond symbolic positioning. It is building a more comprehensive Muslim-friendly ecosystem across dining, hotels, attractions, and events. The central issue now is conversion: whether this growth in readiness is translating into stronger arrivals, longer stays, and repeat visitation.

Table 3. Areas of Progress in Hong Kong's Muslim-Friendly Tourism Development

No.	Area	Evidence of progress	Policy significance
1	International recognition	3rd among non-OIC destinations in GMTI 2025	External validation of progress
2	Restaurant certification	160+ halal-certified restaurants by March 2025	Improves day-to-day destination usability
3	Hotel accreditation	55 accredited hotels by March 2025	Strengthens hospitality confidence
4	Attractions / MICE	5 accredited attractions and MICE venues	Supports leisure and business positioning
5	Product diversification	Expansion beyond basic halal dining into hotels and higher-end offerings	Broadens market appeal

Source: Mastercard-CrescentRating GMTI 2025; HKTB Annual Report 2024/25.

5. Market Structure: ASEAN Scale, Indian Growth, and Gulf Potential

The updated market evidence suggests a three-tier structure for Hong Kong’s Muslim-friendly tourism strategy.

First, **Malaysia and Indonesia** remain the clearest scale markets. Both are nearby, predominantly Muslim, and well suited to family and repeat travel. Improvements in halal dining, prayer convenience, and family-oriented itineraries are most likely to yield immediate gains in these markets.

Second, **India** is a strategic hybrid market. It is important not only because of its very large Muslim population, but also because it supports broader business travel, urban leisure demand, and South Asian connectivity. India’s double-digit growth in 2025 reinforces its strategic relevance.

Third, the **GCC** remains small in scale but significant in value potential. Its rapid growth in 2025 is encouraging, but its low base means that Hong Kong’s Gulf proposition is still emerging rather than mature. This is the segment where premium hospitality, family-oriented luxury packaging, and lifestyle fit matter most.

Table 4. Strategic Market Segmentation

Segment	Main markets	Characteristics	Primary opportunity for Hong Kong
ASEAN Muslim scale markets	Indonesia, Malaysia	Short-haul, family-oriented, food- and convenience-driven	Volume growth and repeat visitation
South Asian hybrid market	India	Mixed leisure, business, family, and Muslim-friendly demand	Broad market growth and connectivity gains
Premium GCC market	Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE	Smaller in volume, higher in spending potential	Luxury, family, retail, and MICE growth

Source: author’s synthesis based on HKTB 2024–2025 market data.

6. The Hotel Sector as a Strategic Anchor

The hotel sector plays a far more important role in Muslim-friendly tourism than simply providing rooms. Hotels often function as the point at which destination promises become tangible. They shape trust, convenience, family comfort, business functionality, and the overall sense of ease. HKTB's report that **55 hotels** had obtained CrescentRating accreditation by March 2025 is therefore especially significant. It suggests that Hong Kong's Muslim-friendly destination-building is becoming more firmly anchored in hospitality infrastructure rather than in food outlets alone.

For Gulf and premium segments, the hotel offer is even more consequential. These travellers may evaluate a destination through the quality of suites and family rooms, privacy, mall access, concierge service, late dining, and the ability of a hotel to create a comfortable self-contained leisure environment. If Hong Kong's leading hotels can package these features clearly and credibly, they can serve as a major conversion mechanism for higher-spending Muslim travellers. This is an inference from HKTB's accreditation push and the known role of hospitality standards in Muslim-friendly destination choice.

Table 5. Strategic Functions of the Hotel Sector in Muslim-Friendly Tourism

No.	Hotel function	Strategic importance
1	Trust anchor	Reduces uncertainty for first-time Muslim visitors
2	Food assurance point	Provides halal-friendly breakfast, room service, and banquet options
3	Prayer support	Offers prayer direction, information, and links to nearby facilities
4	Family environment	Supports privacy, larger rooms, and child-friendly amenities
5	MICE platform	Enables Muslim-friendly conferences, incentives, and corporate stays
6	Premium conversion tool	Especially important for Gulf family and luxury segments

Source: author's synthesis based on HKTB Annual Report 2024/25 and GMTI/CrescentRating destination logic.

7. Halal Food: Essential, but Not Sufficient

Halal food remains the most visible and practical test of whether a destination is genuinely usable for Muslim travellers. If halal options are sparse, difficult to verify, or poorly distributed, broader destination appeal becomes harder to convert into actual visitation. Hong Kong's increase to **more than 160 halal-certified restaurants by March 2025** is therefore a major improvement.

However, halal food alone does not make a destination competitive. The strongest Muslim-friendly destinations succeed because they provide a wider ecosystem: prayer access, hotel readiness, family-friendly attractions, trusted certification, convenient transport, and confidence throughout the visitor journey. The strategic lesson for Hong Kong is straightforward: **halal dining is necessary, but not sufficient**.

Table 6. Key Dimensions Beyond Halal Food

No.	Dimension	Why it matters
1	Prayer access	Enables daily worship during sightseeing or business travel
2	Hotel readiness	Improves family, premium, and business experience
3	Family-friendly design	Important for both ASEAN and Gulf segments
4	Public trust signals	Supports verification and confidence
5	Evening economy fit	Expands attractiveness beyond alcohol-led nightlife
6	Multilingual digital information	Supports planning and real-time decisions

Source: author's synthesis based on GMTI/CrescentRating destination logic and HKTB development strategy.

8. What Hong Kong Still Lacks

Despite clear progress, Hong Kong still appears to lag stronger benchmark destinations in several areas.

First, **prayer integration** remains uneven. Information exists, but faith-compatible travel becomes substantially easier when prayer spaces are embedded into attractions, shopping malls, transport nodes, and family itineraries. Second, **public-facing trust architecture** remains less visible than in benchmark destinations. Accreditation has expanded, but consumer verification and seamless discoverability are not yet central enough to the visitor experience. Third, Hong Kong needs stronger **family-oriented packaging**. The city has ample family attractions, but these are not always marketed in ways that clearly integrate halal dining, prayer convenience, and Muslim-friendly routing. Fourth, Hong Kong remains weaker in some forms of **premium lifestyle fit** for Gulf markets, especially where travellers value privacy, hotel-centred leisure, wellness, and curated luxury-family experiences. Finally, the city's **evening economy** is not yet sufficiently framed around Muslim-compatible leisure. Hong Kong offers many evening experiences, but its international branding often emphasizes bars, cocktails, and wine-and-dine prestige more than family-friendly night activities, late halal dining, or premium hotel-based social leisure. These are not minor details; they shape whether a destination feels merely possible or genuinely comfortable. This comparative reading is an inference supported by GMTI logic, HKTB's current development stage, and Hong Kong's source-market profile.

Table 7. Main Gaps in Hong Kong's Current Muslim-Friendly Offer

No.	Gap	Policy relevance
1	Uneven prayer integration	Reduces itinerary convenience
2	Less visible trust architecture	Weakens verification and confidence
3	Limited family-oriented packaging	Constrains appeal to Muslim families
4	Underdeveloped premium Gulf lifestyle fit	Limits high-value segment conversion
5	Narrowly framed evening economy	Weakens appeal to family and premium Muslim segments

Source: author's synthesis based on HKTB, tourism branding materials, and 2024–2025 market structure.

9. Night Offering, Smoking / Waterpipe Policy, and Segment-Specific Friction

Night-time experience matters to both leisure and business travellers. For many Muslim families, attractive evenings are not primarily alcohol-led; rather, they involve late shopping, waterfront promenades, cultural shows, family entertainment, and comfortable dining. For some premium Gulf travellers, the evening offer may also include hotel-centred social leisure and, in certain cases, shisha. Hong Kong possesses elements of this ecosystem, but it does not yet communicate them as clearly or as systematically as some competing destinations do. This is an inference based on HKTB's product development emphasis and the city's current market composition.

The likely impact of Hong Kong's smoking and waterpipe-related restrictions should be analysed by segment, not in aggregate. The Health Bureau clarified on **28 January 2025** that the Government had proposed prohibiting **flavours in conventional smoking products, including waterpipe tobacco**, rather than banning waterpipe tobacco entirely. Additional anti-smoking amendments, including the ban on smoking while queuing, took effect on **1 January 2026**.

For the largest Muslim visitor segments relevant to Hong Kong, especially travellers from **Indonesia and Malaysia**, such measures are unlikely to be a material deterrent. Their travel priorities are more strongly shaped by halal food, shopping, family attractions, and convenience than by smoking-related amenities. By contrast, the policy may create some friction for a smaller, higher-spending **GCC leisure segment**, for whom shisha can form part of evening social culture. Even here, however, the issue should be treated as a **niche perception risk** rather than a broad tourism threat, especially since Hong Kong's existing shisha offer is already constrained by venue format and nightlife culture. This conclusion is an analytical inference; I did not locate robust econometric evidence isolating the effect on arrivals.

Table 8. Likely Effect of Shisha-Related Restrictions by Segment

Segment	Main markets	Core travel priorities	Relevance of shisha	Likely tourism impact
ASEAN Muslim market	Indonesia, Malaysia	Halal food, family attractions, shopping, convenience	Low	Negligible
South Asian hybrid market	India	Business, shopping, mixed leisure, food assurance	Low to limited	Minimal
Premium GCC leisure market	Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE	Luxury retail, hotels, family comfort, social evening leisure	Moderate for some sub-segments	Moderate but niche

Source: author's analytical synthesis based on HKTB market composition and Government clarification.

10. Comparison with Singapore

Singapore remains the most relevant comparator for Hong Kong. Both are compact, service-intensive, globally connected city destinations with strong airports, hotels, business travel, and urban attractions. Yet Singapore’s Muslim-friendly offer appears more mature and more deeply institutionalised. The difference is not simply one of marketing; it lies in stronger trust architecture, greater mainstream visibility of halal assurance, and a more deeply embedded ecosystem of Muslim-friendly hospitality. Hong Kong, by contrast, is still in a stage of rapid build-out. Put simply, **Singapore sells assurance through system trust, while Hong Kong is still building trust through visible improvement.**

Table 9. Hong Kong and Singapore Compared

No.	Dimension	Hong Kong	Singapore
1	GMTI non-OIC rank (2025)	3rd	1st
2	Strategic stage	Fast-improving, accreditation-expanding	Mature, systematised
3	Trust architecture	Growing but less visible publicly	More institutionalised
4	Muslim-friendly brand image	Improving	More established
5	Core challenge	Convert improvement into confidence	Sustain leadership

Source: GMTI 2025 results.

11. Benchmark Success: Why Malaysia Leads

Among Muslim-friendly destinations, **Malaysia** remains the clearest benchmark. The GMTI ranks Malaysia **1st among OIC destinations** in 2025. Its success rests on ecosystem depth rather than isolated initiatives. Halal food is mainstream, prayer access is easy, Muslim-friendly hospitality is normalised, and family travel is well integrated into the national tourism offer. The lesson for Hong Kong is not to replicate Malaysia wholesale. Hong Kong's comparative advantage is different: it is a dense, premium, globally connected urban gateway. But the principle still applies. The strongest destinations do not treat Muslim-friendly tourism as an add-on; they make it **systemically easy**.

Table 10. Why Benchmark Destinations Succeed

No.	Success factor	Why it matters
1	Mainstream halal ecosystem	Reduces planning friction
2	Easy prayer access	Makes travel practically convenient
3	Family orientation	Broadens market appeal
4	Hotel integration	Supports both leisure and business
5	Strong trust architecture	Builds confidence quickly
6	Clear public messaging	Makes the destination easy to understand

Source: author's synthesis based on benchmark-destination logic in Muslim-friendly tourism research and GMTI principles.

12. Policy Implications and Recommendations

Hong Kong's next phase of policy should focus on **conversion, confidence, and segmentation**, rather than on promotion alone.

First, the city should build **whole-journey confidence** by improving multilingual digital directories, consumer-facing verification, prayer-space mapping, and integration of Muslim-friendly information across transport, hotels, attractions, and booking channels. Second, it should use the **hotel sector as a flagship anchor**. Further accreditation, stronger booking visibility, halal-friendly breakfast and banquet capacity, front-line staff training, and Muslim-friendly MICE packages would make a disproportionate difference, especially for business travel and premium family markets. Third, Hong Kong should prioritise **Indonesia, Malaysia, and India** as near-term scale markets because they already form the backbone of Muslim-related arrivals. The **GCC** should be treated as a distinct premium segment requiring different product design, partnerships, and messaging. Fourth, Hong Kong should **reframe its evening economy** by promoting waterfront experiences, cultural programming, late shopping, premium hotel-based leisure, and halal-friendly late dining. Fifth, tobacco-control issues should be treated as **secondary, segment-specific concerns**. Public-health policy should not be weakened for tourism reasons, but policymakers should recognise that such regulation may influence perception in a narrow premium GCC niche. Finally, Hong Kong should strengthen its **research and data infrastructure** to measure conversion gaps more precisely and evaluate policy effectiveness over time. These recommendations are synthesized from the market and destination-readiness evidence reviewed above.

Table 11. Recommended Policy Actions

No.	Recommendation	Rationale
1	Build whole-journey confidence	Improve trust, navigation, and ease of use
2	Use hotels as flagship anchors	Hotels are key to family, premium, business, and MICE conversion
3	Prioritise ASEAN and India for scale	These markets already drive Muslim-related arrivals
4	Develop a distinct GCC strategy	Gulf markets require more premium and family-oriented packaging
5	Reframe the evening economy	Better aligns with Muslim-compatible leisure preferences
6	Treat shisha issues as secondary	Relevant only to a niche premium segment
7	Strengthen data and evaluation	Needed to measure conversion gaps and refine strategy

Source: author's synthesis based on preceding analysis.

13. Conclusion

Hong Kong has made real progress in Muslim-friendly tourism. Its recognition in the 2025 GMTI, the expansion of halal-certified dining, and the growth of accredited hotels and venues all demonstrate meaningful movement from aspiration to implementation. The city's broader tourism recovery in 2025, with **49.9 million visitors**, provides a stronger base from which to pursue market diversification.

Yet the evidence also shows that Hong Kong's Muslim-related market remains concentrated in a few Asian source markets, while the GCC remains comparatively small despite rapid percentage growth. The deeper challenge is therefore not promotional visibility alone. It is whether Hong Kong can turn visible improvement into **confidence**, and confidence into **scale**.

The way forward is clear. Hong Kong should continue expanding halal supply, but place greater emphasis on hotels, prayer convenience, family-oriented design, digital trust signals, and differentiated segment strategy. If it can make Muslim-friendly travel not merely possible, but **effortless**, it will be better positioned to convert a promising niche into a meaningful pillar of sustainable tourism growth.

Appendix

Appendix Table A1. Main Muslim-Related Source Markets for Hong Kong, 2024–2025

This table summarises the principal Muslim-related source markets discussed in the report and compares full-year 2024 and 2025 arrivals based on HKTB's December 2025 Visitor Arrival Statistics.

No.	Source market	2024 arrivals	2025 arrivals	Growth 2025 vs 2024	Strategic note
A1.1	India	377,792	416,978	+10.4%	Largest of the key Muslim-related markets in absolute terms; also important for business and hybrid leisure demand
A1.2	Malaysia	405,508	430,139	+6.1%	One of Hong Kong's strongest Muslim-majority short-haul markets, with repeat-visit potential
A1.3	Indonesia	366,973	381,530	+4.0%	Important Muslim family and leisure market, though growth was more moderate in 2025
A1.4	GCC markets*	16,498	29,478	+78.7%	Fastest growth rate, but from a very small base; remains a niche segment in volume terms

* GCC markets include Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.

Source: Hong Kong Tourism Board, *Monthly Report – Visitor Arrival Statistics: Dec 2025*.

Appendix Table A2. Comparative Positioning of Hong Kong, Singapore, and Malaysia in Muslim-Friendly Tourism

This table provides a high-level strategic comparison between **Hong Kong** and **Singapore** as leading **non-OIC destinations**, and **Malaysia** as the benchmark **OIC destination**. Because Hong Kong and Singapore are ranked in the non-OIC category while Malaysia is assessed in the OIC category, this table should be read as a comparative positioning exercise rather than a strict like-for-like rank comparison.

No.	Dimension	Hong Kong	Singapore	Malaysia
A2.1	GMTI category	Non-OIC destination	Non-OIC destination	OIC destination
A2.2	GMTI 2025 position	3rd among non-OIC destinations	1st among non-OIC destinations	1st among OIC destinations
A2.3	Current strategic stage	Fast-improving, accreditation-expanding	Mature, systematised, trust-led	Mature, ecosystem-deep, benchmark model
A2.4	Halal ecosystem maturity	Growing rapidly, but still uneven in visibility and integration	Strong and institutionalised	Deeply mainstreamed across daily tourism life
A2.5	Hotel sector role	Increasingly important as trust anchor and conversion tool	Well integrated into mainstream Muslim-friendly offer	Embedded across mainstream hospitality system
A2.6	Family-friendly Muslim travel fit	Improving, but still needs stronger packaging	Strong	Very strong
A2.7	Premium / Gulf market fit	Emerging, still limited in scale	Stronger than Hong Kong	Strong Muslim ecosystem; not primarily positioned through Gulf luxury
A2.8	Main competitive strength	Dense urban gateway with hotels, shopping, and connectivity	High trust, strong system coherence, integrated offer	Muslim-friendly travel made mainstream and effortless
A2.9	Main policy challenge	Convert improvement into confidence and scale	Sustain leadership and innovation	Maintain benchmark position while broadening appeal

Source: Mastercard-CrescentRating GMTI 2025 and supporting destination materials. ([mastercard.com](https://www.mastercard.com))

References

- Airport Authority Hong Kong. *Air Traffic Statistics*. Various issues.
- Airport Authority Hong Kong. *Annual Report*. Various years.
- ASEAN Secretariat. *ASEAN statistical and economic publications*. Various years.
- Census and Statistics Department. *Hong Kong Statistics*. Various issues.
- Census and Statistics Department. *Statistical reports on tourism, hotels, restaurants and related services*. Various issues.
- Civil Aviation Department. Air traffic and connectivity materials. Various years.
- CrescentRating. *Global Muslim Travel Index 2025*. 2025.
- CrescentRating. Muslim-friendly destination and hotel accreditation materials. Various years.
- Department of Islamic Development Malaysia. Halal certification materials. Various years.
- Government of the Hong Kong Special Administrative Region. "Policy Address." Various years.
- Government of the Hong Kong Special Administrative Region. Press releases and policy statements on tourism, aviation, hospitality and mega-events. Various years.
- Health Bureau. Public communications and legislative materials on tobacco control measures. 2025–2026.
- Hong Kong Trade Development Council. Market insights on ASEAN, India, the Middle East, retail and hospitality. Various years.
- Hong Kong Tourism Board. *Annual Report 2024/25*. 2025.
- Hong Kong Tourism Board. "Catalysing Target Segment Growth." In *Annual Report 2024/25*. 2025.
- Hong Kong Tourism Board. "Executive Director's Review." In *Annual Report 2024/25*. 2025.
- Hong Kong Tourism Board. "HKTB Announces that Close to 45 Million Visitors Received in Hong Kong in 2024." January 2025.
- Hong Kong Tourism Board. "HKTB Announces that 49.9 Million Visitors Received in Hong Kong in 2025." 19 January 2026.
- Hong Kong Tourism Board. *Monthly Report – Visitor Arrival Statistics: December 2025*. 2026.
- Hong Kong Tourism Board. *Monthly Report – Visitor Arrival Statistics: Full Year 2025*. 2026.
- Hong Kong Tourism Board. Official destination materials on Muslim-friendly travel, halal dining, accredited hotels and visitor services. Various years.
- International Monetary Fund. Regional economic outlooks and country reports. Various years.
- Invest Hong Kong. Sectoral materials on hospitality, tourism, retail and international business positioning. Various years.
- Islamic Religious Council of Singapore. Halal certification materials. Various years.
- Legislative Council Secretariat. Papers and briefs on tourism development, hospitality competitiveness and tobacco control. Various years.
- Malaysia Tourism Promotion Board. Official materials on Muslim-friendly tourism and halal hospitality. Various years.
- Mastercard. "Mastercard-CrescentRating Global Muslim Travel Index Reveals Trends Shaping the Future of Halal Travel." 2025.
- Mastercard and CrescentRating. *Mastercard-CrescentRating Global Muslim Travel Index 2025*. 2025.
- Ministry of Tourism, Arts and Culture Malaysia. Policy and promotional materials on halal tourism. Various years.
- Organisation of Islamic Cooperation. Demographic and economic background materials. Various years.
- Pew Research Center. Research and projections on global Muslim populations. Various years.
- Singapore Department of Statistics. Tourism-related statistical releases. Various years.
- Singapore Tourism Board. Official destination materials on Muslim-friendly visitor services, halal dining and family travel. Various years.
- Statistical, Economic and Social Research and Training Centre for Islamic Countries. Statistical reports on OIC economies and populations. Various years.
- United Nations World Tourism Organization. Global tourism reports and statistical updates. Various years.
- World Bank. World development indicators and country data. Various years.
- World Travel & Tourism Council. Economic impact reports and travel outlook materials. Various years.