

Market Potential of Muslim Tourism

11 July 2019



Overview

- ❑ **Muslim Market Potential**
- ❑ **Key Touch-points for Muslims-Friendly Services**
- ❑ **Competitors Analysis**
- ❑ **HKTB Support on Promotion**



Muslim Market Potential

- ◆ One of the world's highest spending tourist markets, destinations, businesses and travel-related entities
- ◆ A fast-paced growth of Muslim travel market to reach US\$220 billion by 2020 and grow further to reach US\$300 billion by 2026

2000
25 Million
Visitors

2010
98 Million
Visitors

2017
131 Million
Visitors

2020
158 Million
Visitors

**Travel
Expenditure
US\$
300
Billion
by 2026**

5

KEY Drivers of fast-growing Muslim Tourism



1. Growing Muslim Population



2018 1 in 4 was Muslim

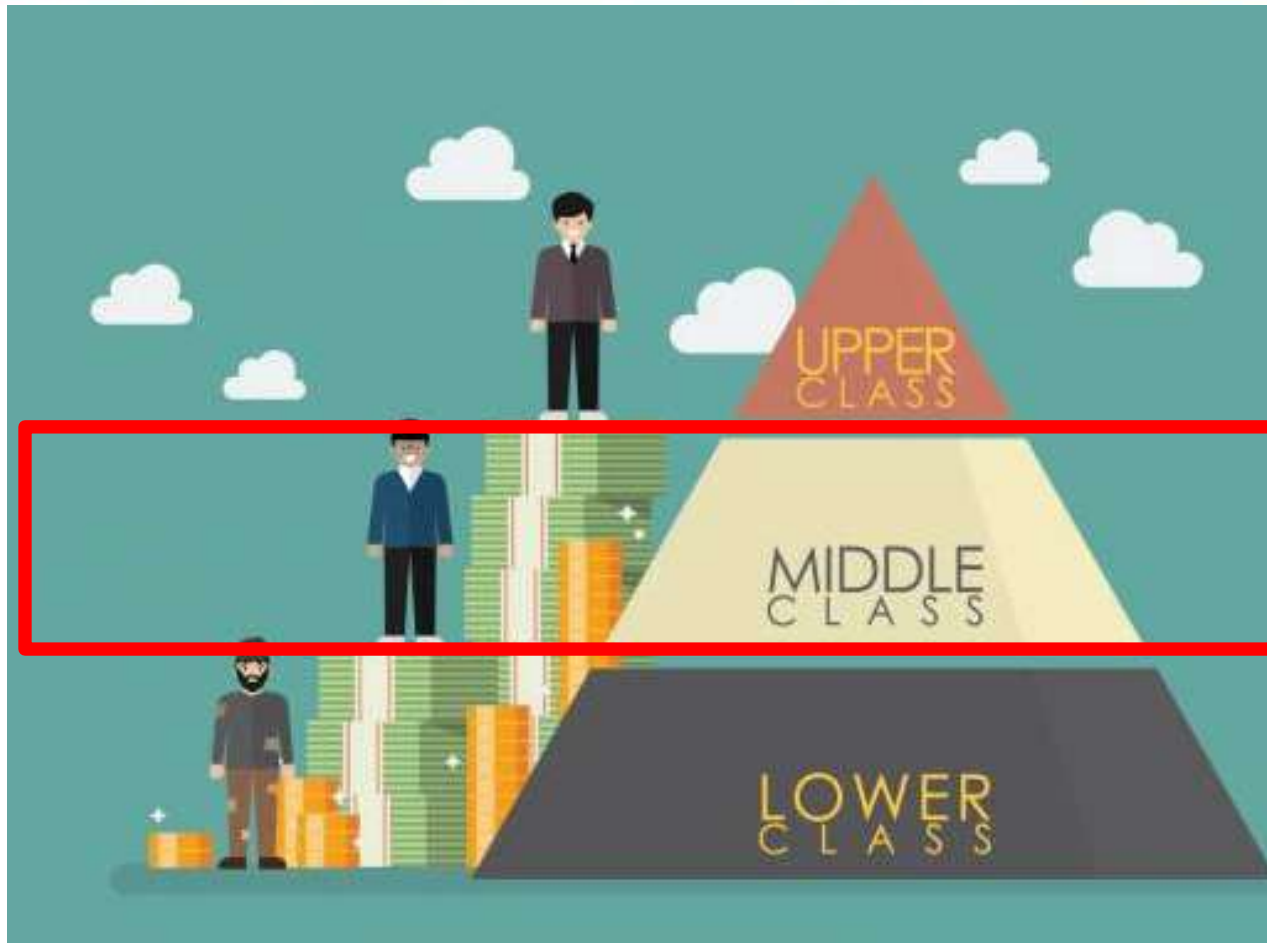


2050 1 in 3 would be Muslim
= 2.8 billion people





2. Growing Middle Class & Disposable Income



- ✓ Muslim Middle class continues to rise in the Gulf countries, Indonesia and Malaysia
- ✓ Skilled Muslim professionals & urban female Muslims enlarge Muslim consumer base

3. Younger Population

- ◆ Muslim median range of 24 in 2015, the youngest segment amongst all other major religious groups
- ◆ These Muslim millennials and young adults, with some already transiting into parenthood, are shaping the future of tourism and hospitality with their unique service needs
- ◆ Behaviors include: online purchase, instant travel, social media engagement

4. Increasing Access to Travel Information

- ◆ Increasing AI-Enabled Travel Solutions:
 - Connect with Muslim travelers and serving their various needs and profiles

5. Business Travel

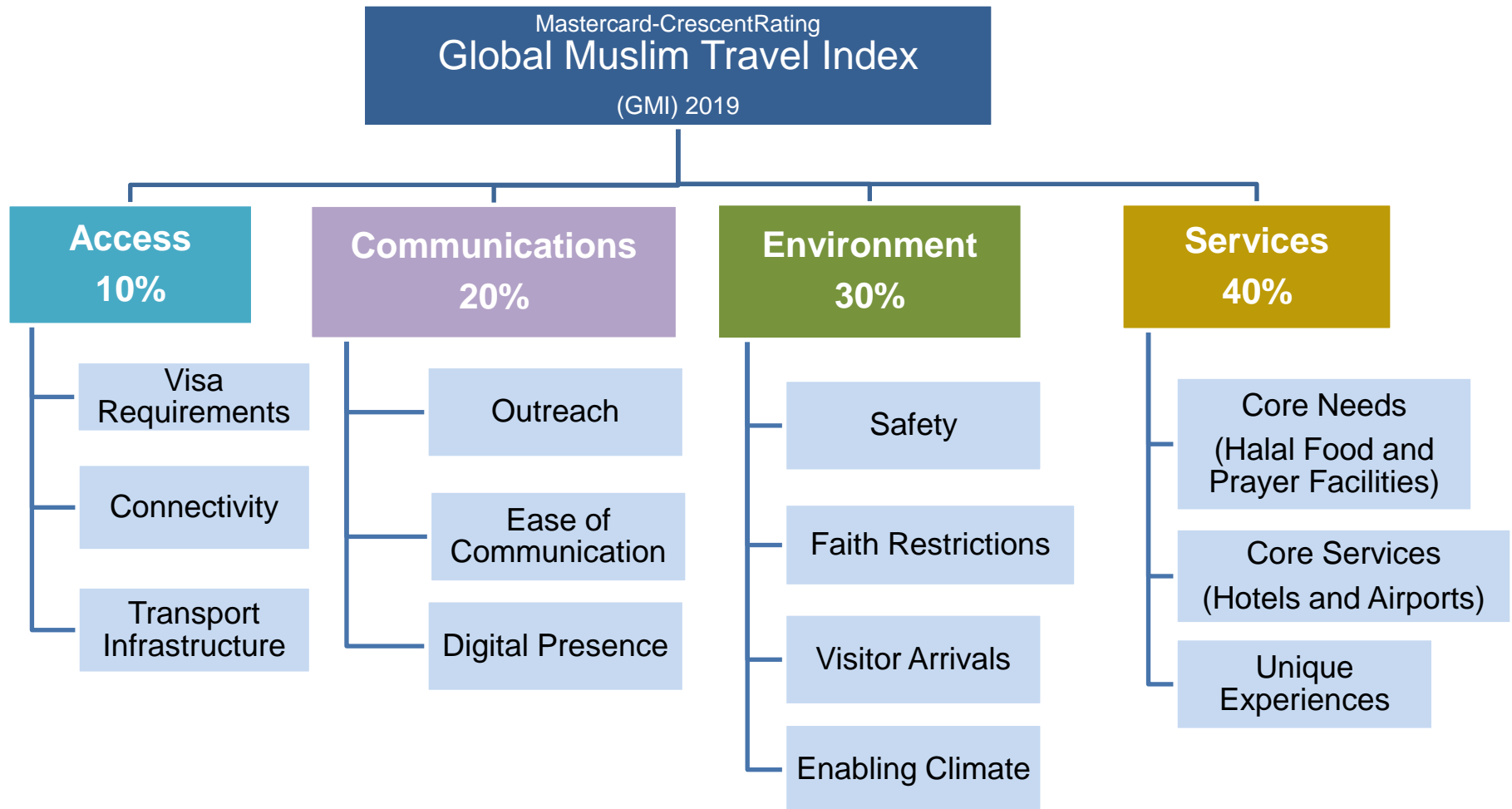
- ◆ Most Muslims represent growing economies, business travel is expected to grow rapidly to meet these new business opportunities

KEY Touch-points for Muslim-Friendly Services



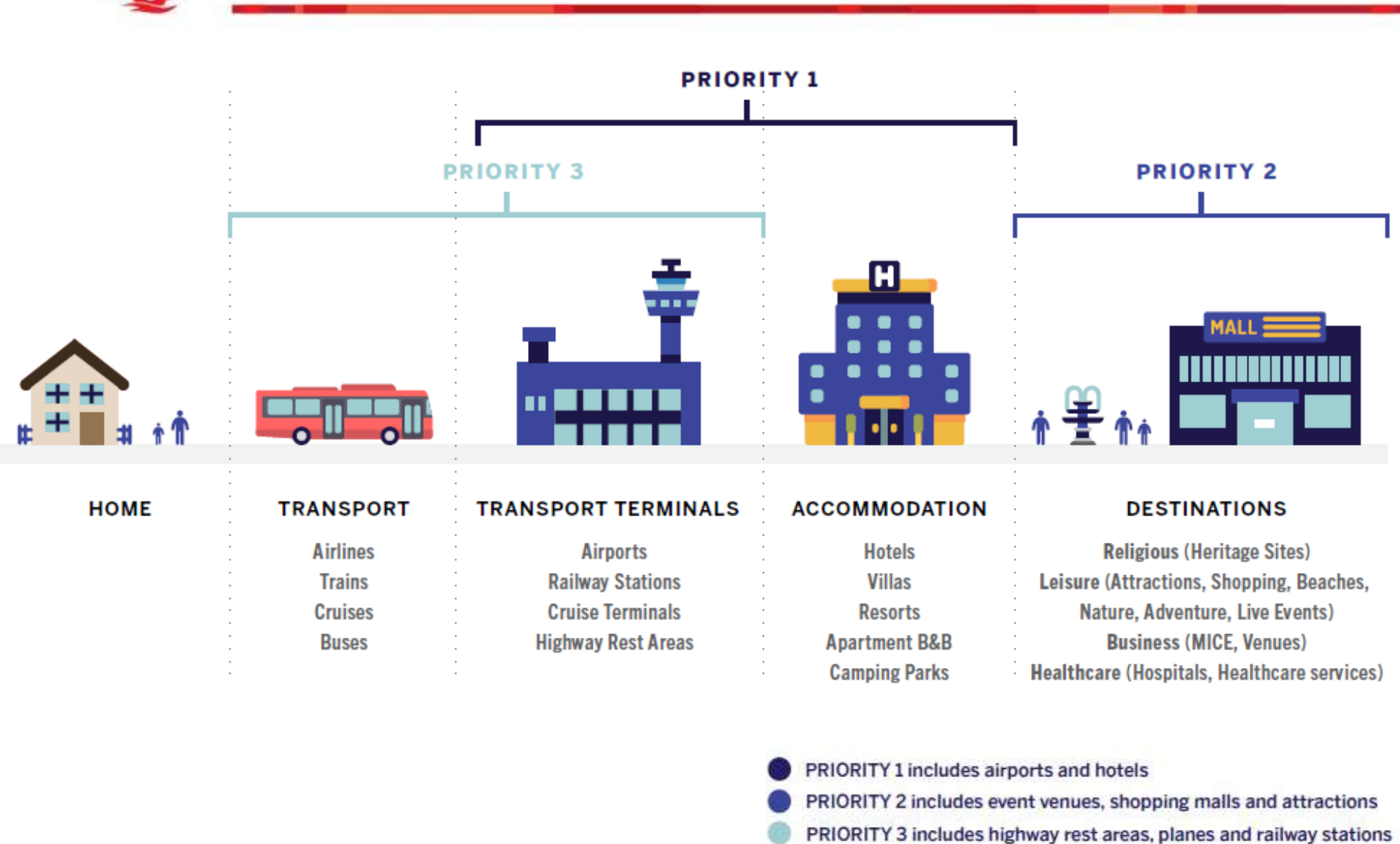
Global Muslim Travel Index (GMTI)

- ◆ The GMTI criteria are based on “CrescentRating ACES model” which encompasses 4 key factors:





Consumer Journey





Consumer Journey – HK vs Non OIC (Organization of Islamic Cooperation)

- PRIORITY 1 includes airports and hotels
- PRIORITY 2 includes event venues, shopping malls and attractions

Priority	Assessment criteria	Hong Kong	Top 10 Non OIC Average
1	Core Services - Airports	77	55
1	Core Services - Hotels	28	39
1	Core needs - restaurants	55	56
1	Core needs - prayer places	30	43
2	Unique Experiences/ Attractions	11	23



GMTI Ranking: Hong Kong (2019)





- ◆ HK ranked 31st among 130 destinations (27th in 2018)
- ◆ HK ranked 7th among Non-OIC (5th in 2018)
- ◆ Hong Kong ranked 5th among Asian Countries (4th in 2018)



COMPETITOR ANALYSIS



Cities Snapshot

Cities	No. of Mosques (Prayer space)	No. of Halal- certified restaurants	No. of Muslim- Friendly restaurants
 Tokyo	18 (56)	84	398
 Seoul	1 (42)	9	99
 Taipei	4 (16)	47	Data not available
 Hong Kong	5 (36)	76	Data not available

ACCOMMODATIONS



Japan – Muslim-Friendly Hotel Listing



Muslim Friendly HOTELS
Find Halal or Muslim Friendly HOTELS in Japan.

Select area Hotel name Search

POPULAR CITIES



YouCo JAPAN
Only the Best of "Made in Japan"

Great Japan Destination Restaurant **Hotel**

Muslim Friendly Rating:

- 友友友** Prayer Area + All Halal Meat Menu (Separate Halal Kitchen)
- 友友** Prayer Area + Some Halal Meat Menu (Pork Free Kitchen)
- 友** Prayer Area + Some Halal Meat Menu

City: **Select City First**













Category:

Stations:

Keywords:

Search

RECOMENDED HOTELS

 <p>Sheraton Miyako Hotel Osaka Osaka With Available ^{en} Within 5 min of Station</p>	 <p>Park Hyatt Tokyo Tokyo With Available</p>	 <p>HOTEL GRANVIA OSAKA Osaka With Available ^{en} Within 5 min of Station</p>	 <p>HOTEL CHINZANSO TOKYO Tokyo With Available</p>
 <p>KYOTO CENTURY HOTEL Kyoto With Available ^{en} Within 5 min of Station</p>	 <p>SAKURA HOTEL HATAGAYA Tokyo With Available ^{en} Within 5 min of Station</p>	 <p>Ruputsu Resort Hotel & Convention Ruputsu Tower Hokkaido With Available</p>	 <p>HOTEL MYSTAYS PREMIER Sapporo Park Hokkaido With Available ^{en} Within 5 min of Station</p>
 <p>Kinugawa Park Hotels Tohoku With Available ^{en} Within 5 min of Station</p>	 <p>HOTEL GRANVIA KYOTO Kyoto With Available ^{en} Within 5 min of Station</p>	 <p>SAHORO RESORT HOTEL Hokkaido With Available</p>	 <p>Wakaniki Ryokan Aizuwaki With Available</p>

1/4 1 2 3 4



Taiwan – Accommodations for Muslim Needs



- ◆ An entire block/floor in hotels dedicated to Muslim visitors
- ◆ Dedicated Halal section & cutlery arrangements
- ◆ Prayer mat along with Qiblah, prayer timings & Muslim-friendly guides
- ◆ Washrooms equipped with bidets

Halal Wood-fired Pizza Oven



Qiblah direction & Prayer Timetable



Washrooms equipped with bidets

Muslim utensils & cutleries

FOOD & BEVERAGE



**Halal
slaughtered
meat**





Korea – Halal Certified Korean Food



Halal Kitchen Korea



Halal Kitchen Korea



Halal Shin Ramyun Halal Kimchi



Eid Halal Korean Food



Namisum Kkokko Chuncheon Dakgalbi



Busan Jib Restaurant



Korea – Muslim-Friendly Restaurants



- ◆ Annual “Halal Restaurant Week” which features renowned chefs & offers attractive promotions
- ◆ Provide event guidebook & travel tips on Korea’s Muslim friendly food options





Taiwan – Halal Certified Local Food



- ◆ Halal certified and Muslim Friendly local Taiwanese food
- ◆ Vigor Kobo 維格餅家 – Taiwan no. 1 souvenir with more than 10 items Halal Certified



Chang Beef Noodle Soup



Silks Palace at the National Palace Museum



Vigor Kobo 維格餅家 Local Snacks



Local Desserts at Ice Monster

ATTRACTIONS/ VISITORS FACILITIES

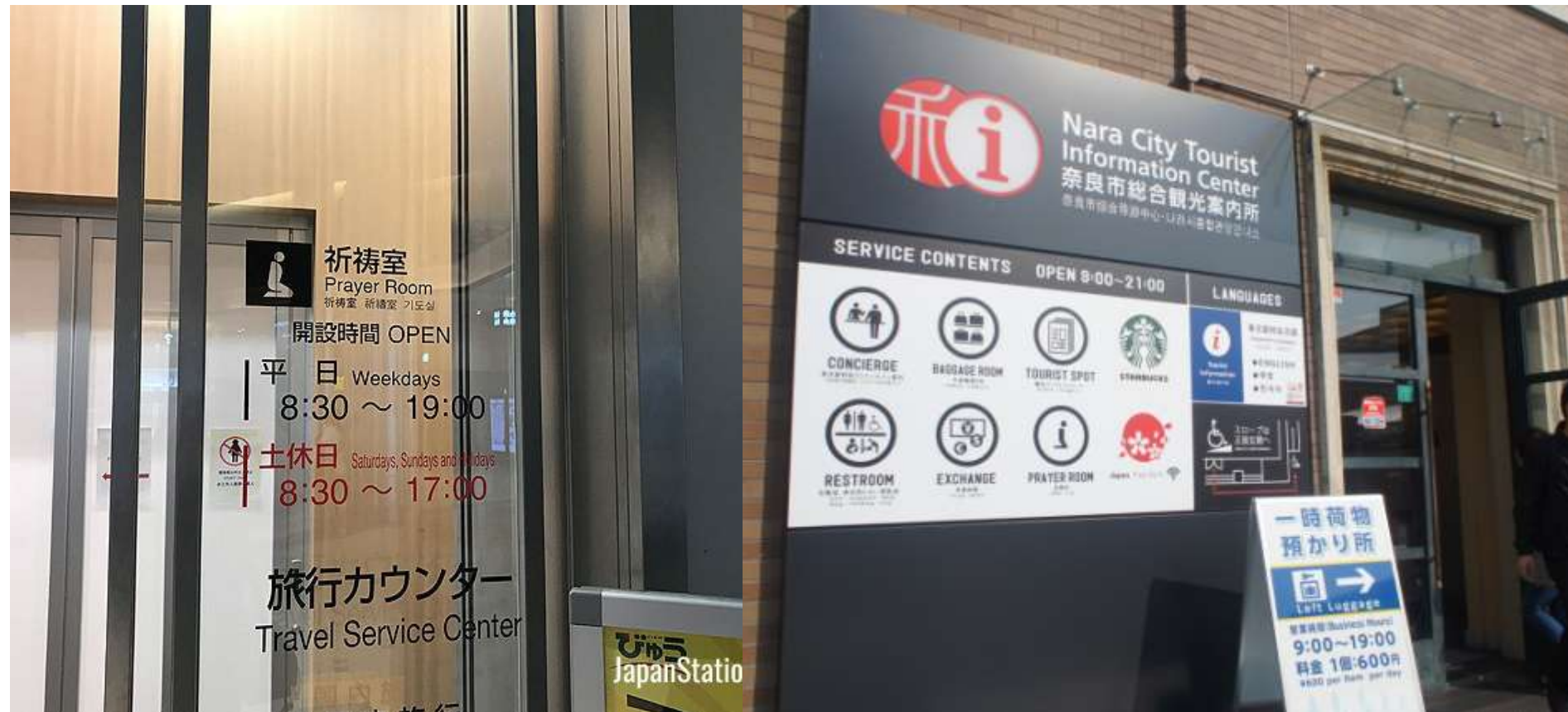




Japan – Availability of Muslim Amenities



- ◆ Prayer facilities widely available at shopping malls & train stations
- ◆ Welcoming Muslim Visitors to the Tokyo's 2020 Olympics



Prayer Rooms at Shopping Malls & Train Stations



Japan – Countrywide Initiatives



- ◆ Muslim-friendly map for various prefectures
- ◆ Provides detailed information on Halal restaurant, prayer space, tours & multi-lingual centre contact



HKTB Support on Promotion





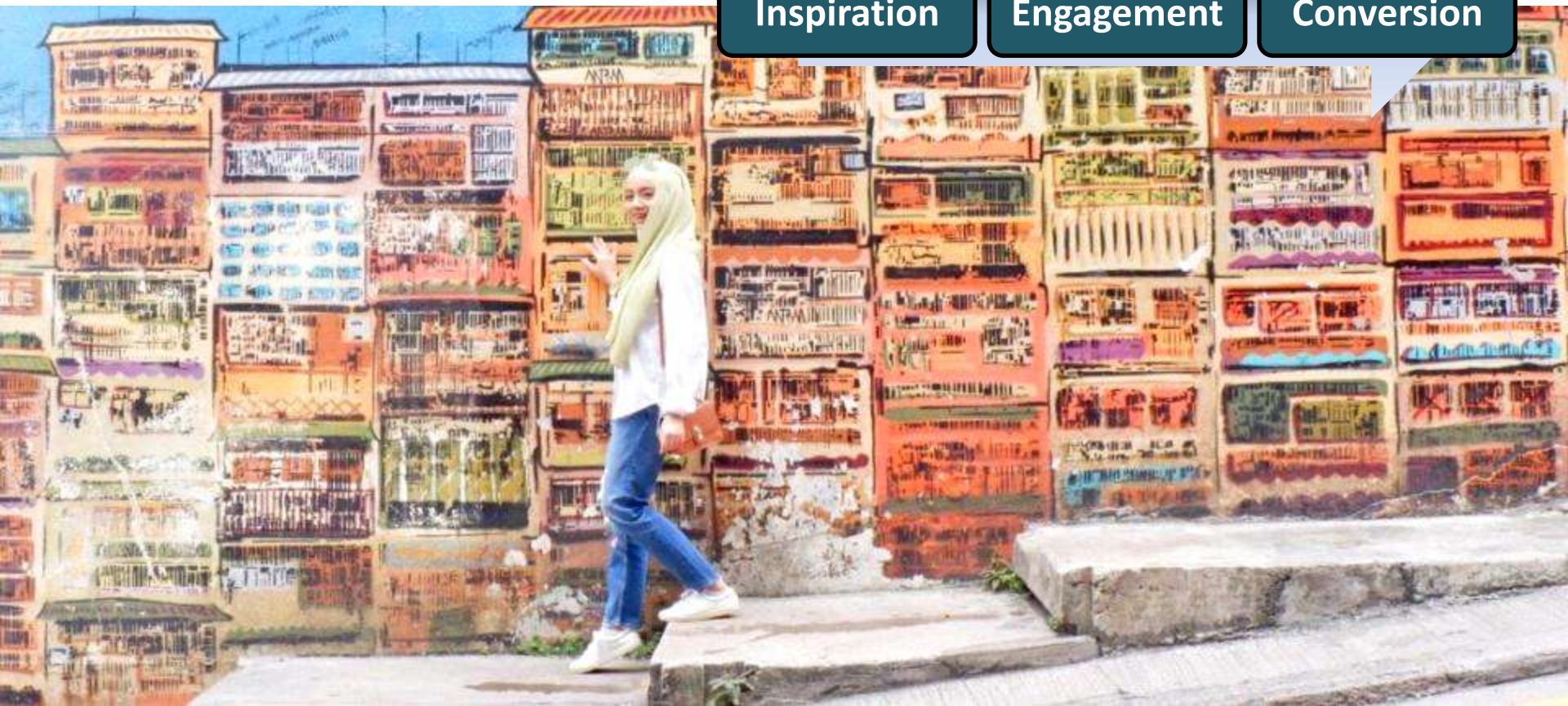
Muslim Strategy

- ◆ Highlight **authentic travel experience**
- ◆ Create **word-of-mouth** through always-on media partnership
- ◆ Increase collaboration with **Muslim travel trade**

Inspiration

Engagement

Conversion





Call To Action: HKT & Hotels & Attractions

- ◆ Develop a Muslim-Friendly hotels & attractions list
 - **TODAY ! Self-assessment of Muslim-Friendliness of the premises**
 - Build awareness at targeted overseas markets

- ◆ Organize in-depth training
 - Trade partners enrollment to prepare for Muslim-Friendly verification program

- ◆ Facilitate and support Muslim-Friendly verification process
 - Participate in Muslim-Friendly verification by renowned Muslim-recognized accreditation body

- ◆ **Big Bang Promotion with media partnership, OTAs and HKT's touch-point**
 - Strengthen collaboration with Muslim travel community
 - Partner with Muslim OTAs
 - Production of regional and local TV programs
 - Utilize HKT's channels (social media, visitor centre and website)





Moving Forward

2019

2020

Jul

Aug

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Muslim seminar
hotels &
attractions

Self-assessment
& listing of self-declared
Muslim-Friendly hotels &
attractions

Collaborate with
QTSA & HKHA to
arrange training

“Muslim-Friendly”
hotels & attractions
verification



HONG KONG
TOURISM BOARD

THANK YOU

THANK YOU