



# CCO BRIEF ON TOURISM

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## 1. Introduction

Tourism, as a sector, directly affects the economic welfare, employment, income and workforce of developed and developing countries. Tourism is an important driving force both by providing a large foreign exchange inflow as well as supporting the economic development of countries. Since it is a labour-intensive sector, it also helps reduce unemployment and creates new job opportunities. Tourism not only brings countries or people together, but also increases interaction between people. This interaction enables the integration of international cultural and social communication.

Tourism is a major part of the contemporary experience economy, in which food plays an important role. Food is a key part of all cultures, a major element of global intangible heritage and an increasingly important attraction for tourists. The linkages between food and tourism also provide a platform for local economic development, which can be strengthened by the use of food experiences for branding and marketing destinations.<sup>1</sup>

International tourist arrivals reached 97% of pre-pandemic levels in the first quarter of 2024. According to UN Tourism, more than 285 million tourists travelled internationally in January-March, about 20% more than the first quarter of 2023, underscoring the sector's near-complete recovery from the impacts of the pandemic. In 2023, international tourist arrivals recovered 89% of 2019 levels and export revenues from tourism 96%, while direct tourism GDP reached the same levels as in 2019.

According to UN Tourism's projection for 2024 points to a full recovery of international tourism with arrivals growing 2% above 2019 levels. In line with this, the Middle East saw the strongest relative growth, with international arrivals exceeding by 36% pre-pandemic levels in the first part of 2024.. This follows an extraordinary performance in 2023, when the Middle East became the first world region to recover pre-pandemic numbers (+22%).

Europe, the world's largest destination region, exceeded pre-pandemic levels in a quarter for the first time. The region recorded 120 million international tourists in the first three months of the year, backed by robust intra-regional demand.

While Africa welcomed 5% more arrivals in the first quarter of 2024 than in the first quarter of 2019, and 13% more than in the first quarter of 2023, The Americas practically recovered pre-pandemic numbers this first quarter, with arrivals reaching 99% of 2019 levels.

International tourism is experiencing a rapid recovery in Asia and the Pacific where arrivals reached 82% of pre-pandemic levels in the first quarter of 2024, after recovering 65% in the year 2023.

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<sup>1</sup> OECD (2012), *Food and the Tourism Experience: The OECD-Korea Workshop*, OECD Studies on Tourism, OECD Publishing, Paris,

Total export revenues from international tourism, including both receipts and passenger transport, reached USD 1.7 trillion in 2023, about 96% of pre-pandemic levels in real terms. Tourism direct GDP recovered pre-pandemic levels, reaching an estimated USD 3.3 trillion in 2023, equivalent to 3% of global GDP.

However, tourism's recovery also faces some challenges. According to the UN Tourism, economic and geopolitical headwinds continue to pose significant challenges to international tourism and confidence levels. Tourists are expected to continue to seek value for money and travel closer to home in response to elevated prices and overall economic challenges, while extreme temperatures and other weather events could affect the destination choice of many travellers. As international tourism continues to recover and expand, fuelling economic growth and employment around the world, governments will need to continue adapting and enhancing their management of tourism at the national and local levels to ensure communities and residents are at the centre of this development.

Food is a core element in tourism experiences and a critical factor contributing to destinations and hospitality businesses' success (COMCEC, 2024). As a central component of the tourist experience, food is also considered an element driving travel behaviour and shaping the destination selection process. Aware of this potential impact, several destinations have started to position themselves as attractive gastronomy destinations. Gastronomy tourism, therefore, has become a growing niche tourism market that demands acute attention if destinations (especially those with rich culinary traditions yet whose share of the tourism market is still limited such as several OIC state members) are to harness the power of this promising market (COMCEC,2024).

OIC Member countries have rich culinary heritages, iconic dishes, food markets, and affordable prices for visitors. Many Member Countries have been designated as UNESCO Creative Cities of Gastronomy.<sup>2</sup>

In order to foster gastronomy tourism in OIC countries, innovation, strategic partnerships, targeted marketing, infrastructure development, and supportive policies requires a holistic approach.

## **2. COMCEC Tourism Cooperation**

COMCEC attaches utmost importance to enhance the cooperation in tourism domain among the OIC Member Countries. Considering the emerging area in tourism sector, COMCEC Tourism Working Group devoted its last two consecutive meetings to elaborate on the theme of “Developing and Branding Gastronomy Tourism Destinations within OIC”.

### **2.1. Developing and Branding Gastronomy Tourism Destinations within OIC**

Since the 39<sup>th</sup> Session of the COMCEC, the 22<sup>nd</sup> Meeting of the COMCEC Tourism Working Group (TWG) was held virtually on May 2, 2024 and the 23<sup>th</sup> Meeting was held on September

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<sup>2</sup> These cities are renowned for their contributions to cuisine and rich culinary traditions. This includes Gaziantep, Hatay, and Afyonkarahisar (Türkiye), Bukhara, (Uzbekistan), Isfahan and Rasht (Iran), Sana'a, (Yemen), Zahlé, (Lebanon) (COMCEC,2024).

24-25, 2024 in Ankara, Türkiye respectively, with the theme of “Developing and Branding Gastronomy Tourism Destinations within OIC”.

A research report with the same theme has been prepared for two consecutive COMCEC TWG meetings (22<sup>nd</sup> and 23<sup>rd</sup>). While the first draft of the report, along with a case country study, was submitted to the 22<sup>nd</sup> TWG meeting, the final version of the report was submitted to the 23<sup>rd</sup> TWG meeting. The main objective of the study was to establish a conceptual foundation for a better understanding of the current and future implications of developing and branding gastronomy on tourism in the OIC Member Countries and to come up with sound gastronomy strategies and policies to tackle the challenges arisen so far.

The first draft of the report revealed important findings in terms of developing and branding gastronomy in the world as well as in the OIC Member Countries. It provided a conceptual framework for gastronomy in the tourism sector in the world as well as in the OIC region and global tourism. In light of the discussion during the meeting and with the active contribution of the member countries, the draft version of the report was improved.

The final version of the report has highlighted OIC member countries with best practices, tools, and policy recommendations that will assist them in creating, developing, and marketing gastronomy tourism. Specifically, the study explores strategies and courses of action to foster gastronomy tourism in OIC countries. The study also identifies key barriers hindering the creation, development, and marketing of gastronomy tourism in OIC countries, as well as the core success factors. Additionally, the report included sound, specific, and practical policy recommendations to stakeholders and government policymakers in OIC Member Countries.

The 23<sup>rd</sup> Meeting of Tourism Working Group has come up with the following policy recommendations:

- Improving infrastructure and superstructure to foster the development of gastronomy tourism in OIC Member Countries by facilitating the transportation process and establishing culinary schools.
- Reducing potential negative impacts on food and livestock producers, and inherently gastronomy tourism, through planning and implementing measures including from climate change.
- Moving beyond mass tourism by harnessing the power of gastronomy as a niche tourism market to attract diverse tourist segments through tourism product diversification.
- Enhancing gastronomy tourism through boosting agriculture and supporting local farmers/livestock breeders with subsidies, training programs and infrastructure development
- Developing and implementing well-defined marketing strategies by branding marketing campaigns such as storytelling, traditional recipes and food production methods.
- Facilitating public-private partnerships towards fostering gastronomy tourism for promoting local cuisine as well as increasing visibility of gastronomy assets

- Promoting capacity building in the OIC Member Countries especially through the activation of human resources, as a strategic tool to develop gastronomy tourism.

The reports and presentations submitted to the Working Group are available on the COMCEC web page. (<http://www.comcec.org/> )

### **3. The COMCEC Project Funding Mechanism**

COMCEC Project Funding (CPF) is the other important instrument of the Strategy. Projects financed under the CPF need to serve cooperation among member countries and must be designed in accordance with the objectives and the expected outcomes defined by the Strategy in the tourism section. Projects also play important roles in realization of the policy recommendations formulated by the member countries during the TWG meetings.

In 2024, five following projects have been selected to be supported in tourism area:

The first project titled “Capacity Building of Tourism Guides in Selected OIC Member Countries” has been implemented by Mali with the partnership of Burkina Faso and Nigeria. This project aimed to improve the competencies of tourism guides for changing conditions and the sustainability of the sector. In this respect, a training activity was conducted in order to provide theoretical information to national and community tourism guides on guiding techniques, quality service delivery and customer satisfaction. Also, a local field visit for practicum was made to an identified location.

The second project titled “Enhancing Capacities of Tourism Stakeholders for Adapting to Customers Changing Needs” has been implemented by Nigeria with the participation of three member countries namely the Gambia, Uganda and Mali. The project aimed to improve the skills of human resources employed in the private sector in line with the changing demands of customers in order to ensure a strong and sustainable tourism sector. Within the context of the project, a training and local field visit were organized. The training focused on the topics of identification, analysis, planning and communication to adapt to the dynamic nature of customers' expectations and demands. In addition, a field visit to tourism sites in Abuja was conducted for gaining practical experiences.

The third project namely “Improving Entrepreneurial Capacities of Selected Tourism Stakeholders for Ensuring Competitiveness in Tourism” is being implemented by Togo with the partnership of Türkiye. This project focuses on the development and management of tourism services and products to ensure a competitive tourism environment. In this context, a study visit will be organized to the Türkiye in order to learn good practices and experiences on entrepreneurship in tourism. Afterwards, a training in the fields of innovation, quality, communication, marketing and performance will be carried out for youth and women participants in order to enhance their entrepreneurial capabilities in tourism service delivery and products.

The fourth project called “Empowering Entrepreneurship Skills of Community-Based Tourism Enterprises to Enhance Competitiveness of Tourism Industry” has been implemented by Uganda with the participation of Cameroon, Malaysia and Senegal. This project aimed at enhancing the entrepreneurial skills of private sector stakeholders (especially youth and women) in the tourism sector in the areas of product development, resource management and service delivery. In this regard, a training focusing on innovation, planning, financial management, business performance management, risk management and marketing for entrepreneurship and a local site to put the theoretical knowledge into practice visit were performed.

The last project titled “Strengthening the Capacities of African Tourism Boards through Sustainable Human Resource Management Practices” is being implemented by SESRIC for the benefit of 17 Member Countries. This project aims to enhance the efficiency and effectiveness of African tourism boards on sustainable human resource management practices, regulatory frameworks, the importance of the private sector, community-based tourism and marketing strategies. In this respect, a training and a workshop will be organized. The training will include the topics of sustainable human resource management and a competitive tourism sector in order to provide theoretical background to the Tourism Boards representatives. Within the framework of the workshop, participants will share knowledge and experiences.

#### **4. Other Ongoing Activities**

Other important activities carried out under tourism cooperation can be summarized as follows:

- The 12<sup>th</sup> Islamic Conference of Tourism Ministers (ICTM) was held on May 31<sup>st</sup>-June 2<sup>nd</sup>, 2024 in Khiva/Republic of Uzbekistan with the theme of “Development of the Tourism Industry in Sustainable and Resilient Way”. The Meeting prepared the Resolution of the 12<sup>th</sup> ICTM and other tourism related OIC Resolutions and Programs. The cities, Dakar (2025), Cairo (2026) and Lahore (2027) were selected as "OIC Tourism City" by the Tourism Coordination Committee. The 13<sup>th</sup> ICTM Meeting will be held in State of Qatar in 2026.
- OIC/COMCEC Private Sector Tourism Forum provides a regular communication channel for the private sector representatives of the Member Countries. In this regard, Ministry of Culture and Tourism of the Republic of Türkiye, which serves as the Secretariat of the Forum, will organize the 12<sup>th</sup> Meeting of the OIC/COMCEC Private Sector Tourism Forum on October 10, 2024, with the theme of “Sustainable Destination Development and Management in OIC Countries”.

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