



Islamic Centre for
Development of Trade
(ICDT)



UNLEASHING TOURISM POTENTIAL IN OIC COUNTRIES THROUGH HEALTH AND GASTRONOMY TOURISM

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ACRONYMS

AI: Artificial Intelligence

AR: Augmented Reality

CAGR: Compound Annual Growth Rate

COMCEC: Standing Committee for Economic and Commercial Cooperation

DHA: Dubai Health Authority

EHR: Electronic Health Records

FDI: Foreign Direct Investment

GDP: Gross Domestic Product

GW: Global Wellness Institute

ICDT: Islamic Centre for the Development of Trade

IMF: International Monetary Fund

IPAs: Investment Promotion Agencies

JCI: Joint Commission International

KLWC: Kuala Lumpur Wellness City

LAMEA: Latin America, Middle East and Africa

MENA: Middle East and North Africa

MTI: Medical Tourism Index

OIC: Organization of Islamic Cooperation

SESRIC: Statistical, Economic and Social Research and Training Centre for Islamic Countries

UAE: United Arab Emirates

UNDP: United Nations Development Programme

UNWTO: United Nations World Tourism Organization

USPs: Unique Selling Propositions

VR: Virtual Reality

WDI: World Development Indicators

WEF: World Economic Forum

WEOD: World Economic Outlook Database

WFTA: World Food Travel Association

WHC: World Heritage Centre

WHO: World Health Organization

WTO: World Trade Organization

WTTC: World Travel & Tourism Council

FOREWORD



Mrs. Latifa El Bouabdellaoui
Director General

*Islamic Centre for Development of
Trade (ICDT)*

The Organization of Islamic Cooperation with 57 Member States, the second largest regional organization after the UN in terms of the number of member states, which totaled more than 1.8 billion people that generate around 10% of the global GDP. The OIC region is home to a diverse range of cultures, economies, health infrastructure, societies, and cuisines, making it a natural destination for international travelers, particularly for health and gastronomy tourism.

In recent years, there has been a growing interest in niche tourism markets. In particular, people are increasingly looking for ways to improve their health and well-being and would like to enjoy different cuisines and tastes to make their travel more memorable. The growth potential in health tourism and gastronomy tourism is incredibly high. For instance, the global medical tourism market is projected to reach a value of \$273.7 billion by 2027 with

a compound annual growth rate (CAGR) of 12.8% from 2019 to 2027. This dynamism in two niche tourism markets has the potential to accelerate economic growth in the OIC region and support sustainable development.

It is with great pleasure that I present the ICDT's report 2023 on "*Unleashing Tourism Potential in OIC Countries through Health and Gastronomy Tourism*". This report is the first of its kind to focus on the potential of health and gastronomy tourism in the OIC region. The report examines the state of health and gastronomy tourism while highlighting opportunities and challenges in OIC countries. It further provides an overview of the different types of health and gastronomy tourism and the potential benefits of these two rapidly growing tourism markets in the OIC region. The report also discusses the investment opportunities in OIC countries in relation to health and gastronomy tourism and offers a candid discussion of how digitalization could affect the development of these two important niche markets.

I would like to draw your attention that the report also presents twelve selected country case studies from OIC countries located in Africa, Asia, and Arab regions in order to shed light on their journey in health and gastronomy tourism. These case studies further provide insights into a number of successful initiatives and policies of these countries that could offer valuable lessons for other OIC countries that are interested in developing these two markets.

I believe that this report will be a precious resource for tourism stakeholders, policymakers, and academics in the OIC region. It will help to raise awareness of the potential of health and gastronomy tourism. Besides, the wide range of policy implications highlighted in the report will offer practical guidance on ways and means of triggering growth, addressing challenges, and enhancing intra-OIC cooperation in two niche tourism markets and contributing to achieving the OIC-2025 Programme of Action's target 25% of intra- OIC trade share by 2025.

EXECUTIVE SUMMARY

HEALTH TOURISM

Navigating health tourism trends in OIC countries

The global health tourism market has become an important niche market due to factors like cost advantages, aging population, increased international mobility, and improved information access. Governments are playing a pivotal role in driving this growth through sector development initiatives.

While some OIC countries excel in specific treatments due to technical capacity and infrastructure, others aspire to establish a global presence by developing innovative strategies. Factors like treatment affordability, availability, waiting times, care quality, medical innovation, national health schemes, and insurance coverage influence individuals' decisions to engage in health tourism. On the supply side, drivers include health infrastructure, partnerships, accreditation, and training programs. Nevertheless, concerns persist, including care quality, care continuity, unforeseen costs, legal ramifications, and travel-related issues.

The first part of the study conducts an in-depth analysis of health tourism trends, investment trends and climate, digitalization, and case studies from selected six OIC countries namely Tunisia and Qatar from the Arab region, Türkiye and Malaysia from Asia, and Senegal and Mozambique from Africa with a view to identifying a set of policy recommendations to enhance health tourism and foster regional collaboration among OIC member countries.

Health tourism prospects in OIC countries: challenges, opportunities, and strategies for development

The global health tourism sector has witnessed substantial growth in recent years, propelled by factors including escalating healthcare expenses in developed nations, advancements in medical technology, and increased international travel accessibility. The global medical tourism market is projected to reach a value of \$273.72 billion by 2027, growing at a CAGR of 12.8% from 2019 to 2027. The Asia-Pacific and Latin America Middle East Africa (LAMEA) regions are leading in market expansion, with LAMEA and North America emerging as promising hubs for attracting global patients. Among OIC countries, Malaysia, UAE, Türkiye, Egypt, and Indonesia are among frontrunners in health tourism, actively promoting their offerings on the international health tourism market.

In the context of OIC countries, a spectrum of opportunities and challenges presents itself within the health tourism domain. OIC countries are strategically positioned to harness untapped potential, driven by their diverse cultural heritage, historical significance, and natural endowments. By effectively leveraging these attributes, they can attract a broader spectrum of health tourists interested in medical or wellness tourism. Some OIC countries have already gained recognition for their quality healthcare services, affording them the opportunity to capitalize on their medical expertise and cater to a global clientele seeking specialized treatments and advanced medical procedures. Combining cultural experiences with medical offerings holds the potential to enhance the health tourism encounter, capitalizing on the rich cultural legacy these countries offer. Nevertheless, healthcare infrastructure requires enhancement to meet international standards, while regulations demand harmonization and standardization of rules and regulations in order to foster patients' trust.

Strategies for Advancement within the OIC health tourism sector include investments in healthcare infrastructure, regulatory coherence to streamline medical procedures, and public-private partnerships to foster innovation. Integrating cultural experiences into healthcare offerings can create unique selling propositions, while robust digital marketing strategies are vital to showcasing OIC countries' distinct health tourism offerings on the global stage. By addressing these issues and strategically positioning themselves, OIC countries can unlock the sector's untapped potential, collectively paving the way for a thriving health tourism industry.

Investment landscape for health tourism: fostering progress in OIC countries

Encompassing diverse stakeholders such as governmental bodies, promotion agencies, healthcare institutions, tourism entities, and hospitality industry players, the investment ecosystem emerges as a complex network that shapes the development of health tourism. Integral elements such as infrastructure, strategic partnerships, government policies, and incentives play a pivotal role in fostering an environment conducive to investment. This landscape is further delineated by the profound impact of regulations and legal frameworks, encompassing aspects such as licensing, health visas, and industry associations, which collectively serve to attract vital FDI. IPAs of OIC countries have an instrumental role in showcasing the country's offerings and potential in health tourism to prospective investors.

A number of aspects such as ensuring quality standards, navigating ethical considerations, making healthcare accessible and affordable, and maintaining political stability emerge as crucial factors that shape investment decisions. The trends in FDI in health tourism has the potential on create healthcare facilities designed for international patients, especially in countries that are still developing. Within the OIC member countries, the report presents a number of successful FDI examples from countries like Saudi Arabia, UAE, Egypt, Jordan, and Malaysia.

Exploring the impact of digitalization in health tourism: opening doors to new opportunities

Within the realm of health tourism, a digital revolution is underway, spearheading a paradigm shift through the integration of cutting-edge technologies. Innovations like telemedicine, blockchain, AR, VR, and big data are shaping the future. In this landscape, the role of digitalization emerges as a pivotal force, driving the evolution of health tourism by enhancing information access, amplifying convenience, optimizing efficiency, enabling personalized healthcare solutions, ensuring patient safety, and unveiling new avenues for marketing and outreach.

In this picture, it is essential for OIC countries to develop and implement a comprehensive national health digitalization strategy. By uniting efforts to harness the power of digital tools, OIC countries can position themselves at the forefront of health tourism advancement. Vital investments in digital infrastructure lay the groundwork for seamless interactions between healthcare providers and international patients, while fostering innovation hubs nurtures collaboration and propels the growth in health tourism.

The findings illuminate the transformative role of digitalization in health tourism that could lead to a path toward improved patient experience, streamlined operations, and expanded market presence. As OIC countries embrace digital strategies and cultivate innovation ecosystems, they forge a trajectory that not only enhances health tourism offerings but also positions them as leaders in a technologically empowered future.



GASTRONOMY TOURISM

Culinary odyssey: exploring authentic gastronomy tourism in OIC countries

Gastronomy tourism has become popular among travellers seeking authentic food experiences and cultural immersion. This trend has also recently become prevalent among OIC countries where distinctive histories and culinary heritage offer an appealing opportunity for tourists searching for new experiences. OIC countries are witnessing a rising interest in authentic local foods, traditional cooking techniques, and native ingredients. Governments, businesses, and international investors are all interested in this market and investing in culinary tourism, recognizing its economic potential.

Gastronomy tourism has been revolutionized by modern technology, particularly through digitalization. OIC countries are highlighting their culinary offerings, engaging with global audiences, and facilitating reservations and transactions on digital platforms.

Gastronomy tourism in OIC countries: opportunities, challenges, and pathways to growth

Tourism centred around cuisine is growing in popularity across OIC countries. A growing number of OIC countries promote diverse and flavourful cuisine to attract more investors and visitors alike. Türkiye, Qatar, Indonesia, Uzbekistan, Morocco, Iran, and Tunisia are among the popular destinations in gastronomy tourism not only in the OIC region but also in the world. Such successful OIC countries are home to a range of unique and delightful cuisines supported by policies and ecosystems like infrastructure, sustainability, and trained staff. Such countries offer ample investment opportunities. Investors can invest in opening restaurants and hotels, organizing food festivals, and increasing food production. This provides a positive experience for tourists and boosts the economy. Collaboration and innovation are critical factors for overcoming any challenges in health tourism. Standardization and ensuring the quality of services are essential to improve the competitiveness of OIC countries in this niche market.

The global gastronomy tourism market was valued at \$1.2 trillion in 2019 and is expected to reach \$2.1 trillion by 2027, growing at a compound annual growth rate (CAGR) of 9.5% from 2020 to 2027. This figure reflects the dynamism and potential of this niche tourism market. It is estimated that OIC countries will benefit from this growth. Several OIC countries from various OIC sub-regions have already tapped into the gastronomy tourism market and are reaping the benefits. A number of factors contribute to the growth of gastronomy tourism in OIC countries. One reason for this is the wide range of cuisines within the region, from the rich and diverse dishes of the Middle East to the mouth-watering curries of South Asia. Another factor is that OIC countries invest more in developing their

tourism infrastructure such as restaurants, hotels, and other tourist attractions. In addition, the rising middle class in OIC countries is increasingly interested in exploring new cuisines and experiences.

Digitalization could help unleash the potential of gastronomy tourism in the OIC region

Digital tools and new technologies make it easier for people to discover and experience fresh food as well as new cultures. Besides, they help to create new opportunities like online booking and developing more personalized gastronomic experiences. From the perspective of the service providers, digitalization has opened new possibilities for businesses to connect with their target audience and present their offerings in a better way. In this respect, digitalization and the emergence of new technologies could accelerate the digital transformation of services in gastronomy tourism in OIC countries, which could trigger the growth and development of this niche tourism market in the OIC region.

Increasing investments in gastronomy tourism is essential to unlock the potential of OIC countries

OIC countries can increase their export revenue and promote cultural and culinary traditions by investing more in gastronomy and tourism. Attracting Foreign Direct Investment (FDI) to gastronomy tourism is crucial to unleashing its full potential. Many OIC countries are attractive destinations for multinational corporations that invest in gastronomy. For example, Türkiye achieved outstanding performance in this area by attracting 79 new foreign direct investment projects in gastronomy tourism between 2015 and 2019. Furthermore, more than 30 OIC countries have acknowledged the potential of "gastronomy tourism" and are effectively promoting it as a priority investment sector through their respective national Investment Promotion Agencies (IPAs).

OIC countries could strengthen cooperation and explore innovative investment models such as public-private partnerships (PPPs) to encourage additional investments in gastronomy tourism. However, several challenges remain to be addressed. Standardization and certification issues, inadequate infrastructure, limited awareness of the potential of gastronomy tourism, and global uncertainties are impediments that should be addressed to attract more global FDI, particularly in gastronomy tourism ventures.

The review of experiences of six selected OIC countries namely Morocco and Qatar from the Arab region; Indonesia and Uzbekistan from Asia; and Uganda and Nigeria from Africa have revealed the existence of rich policy experiences in the domain of gastronomy tourism. The unique experiences of OIC countries could offer a wide array of cooperation opportunities at the bilateral, regional, and intra-OIC levels.

Gastronomy tourism markets in OIC countries are being developed through policies at both national and OIC levels

National and OIC-level policies can potentially address prevailing challenges and bridge gaps within gastronomy tourism. At a national level, the focus should be on coordinating stakeholders and developing strategies for human capital development. At the OIC cooperation level, integrating gastronomy tourism into relevant meetings, platforms, and events is crucial, along with devising action plans. Strengthening networking among stakeholders with the involvement of institutions such as ICDT, SESRIC, SMIIC, and ICCIA can significantly contribute to the growth of gastronomy tourism. OIC countries can implement specific measures to shape gastronomy tourism policies by benefiting the experiences of other OIC countries. They can establish a dedicated national agency to oversee the

progress of gastronomy tourism and collaborate with the government, businesses, and civil society. A national gastronomy tourism fund could support new restaurants, hotels, and professional training initiatives. Designing a specialized curriculum focused on food heritage, culinary arts, and tourism management can nurture skilled individuals in this field. Investing in digitalization should be an integral part of the strategies of OIC countries in order to develop their gastronomy tourism offerings as well as promote and market the existing services for potential visitors and investors.



OVERVIEW OF THE REPORT

The Organization of Islamic Cooperation (OIC) is a group of 57 countries with a combined population of over 1.8 billion people. It has the potential to be a major player in the international tourism market. The tourism sector in the OIC region creates millions of jobs and helps to preserve and protect the environment. Besides, it promotes harmony and peace while generating billions of revenues and income. For example, recent figures revealed that 235 million international tourists generated \$ 1 trillion in tourism receipts in 2022 growing 50% in real terms compared to 2021, driven by the important rebound in international travel (UNWTO, 2023). Indeed, European tourists reached in 2022 generated USD 550 billion in tourism receipts (EUR 520 billion), or 87% of pre-pandemic levels. Africa recovered 75% of its pre-pandemic receipts, the Middle East 70% and the Americas 68%. Due to prolonged border shutdowns, Asian destinations increased their tourism receipts only by 28%.

Although the COVID-19 pandemic has slowed down the tourism industry, the activities in international tourism rapidly recovered in 2021 and 2022. The growth potential of the tourism industry in the OIC region is immense given the fact that OIC countries are located on four continents, and have a rich and diverse culture, history, and beautiful natural landscapes. They are also home to many religious and historical sites and a welcoming culture for visitors. OIC countries have the potential to be a major player in the international tourism market. With careful planning and investment, the OIC region can improve its tourism competitiveness and become a popular tourist destination for people from all over the world.

Against this background, this research report of ICDT 2023 “Unleashing Tourism Potential in OIC Countries through Health and Gastronomy Tourism” provides a comprehensive overview of the importance of two niche tourism markets for OIC countries to attract the attention of policymakers and provide them with some evidence-based guidance. To this end, the report presents key concepts and reviews the recent trends in the world in general and in the OIC countries in particular by looking at the latest available information and statistics.

The report further showcases selected experiences of six OIC countries in the domain of health and six OIC countries in gastronomy tourism with a view to highlighting opportunities for enhancing intra-OIC cooperation. The investment opportunities and digitalization of tourism services are highlighted in the report given the economic importance of these two concepts that shape the development of the tourism sector. The report further presents some policy recommendations to guide policymakers.

The first part of the report focuses on the health tourism topic and includes five main chapters. In the health tourism part, the report presents six selected case studies from Tunisia and Qatar from the Arab region, Türkiye and Malaysia from Asia, and Senegal and Mozambique from Africa.

The second part of the report is dedicated to the topic of gastronomy tourism and is composed of an additional five core chapters. This part has also six country case studies from Morocco and Qatar from the Arab region; Indonesia and Uzbekistan from Asia; and Uganda and Nigeria from Africa.

This comprehensive report is not only expected to generate benefits for tourism stakeholders but also for practitioners, researchers, and policymakers in the OIC region and beyond. Besides, its findings could offer some guidance to ICDT in shaping and implementing its new TOUR-DEV (Tourism Development) Program and relevant activities in the domain of tourism for the benefit of OIC countries.

PART I: HEALTH TOURISM



Introduction

In an era defined by unprecedented global interconnectedness, the dynamics of the tourism industry are undergoing a profound transformation. In this context, the exploration of health tourism potential within the member states of the Organization of Islamic Cooperation (OIC) emerges as a compelling avenue for economic growth, cultural exchange, and the advancement of healthcare services. Health tourism, the amalgamation of the travel and healthcare domains, has ascended to a position of considerable prominence, transcending geographical confines and cultural demarcations. This part of the report embarks on an in-depth analysis of the potential inherent in unlocking the tourism prospects in OIC countries by strategically capitalizing on the realm of health tourism.

The significance of health, pertinent to both developed and developing nations, is widely acknowledged. The broad objectives and strategies governing healthcare implementations underscore its strategic position in the economic progress of governments. Health tourism, noted for its dynamic contribution to economic development, has witnessed a notable evolution as societies grow more health-conscious and economies undergo transformation. The contemporary landscape of health tourism encompasses a broad spectrum of services, ranging from cutting-edge medical treatments to holistic wellness retreats, melding sophisticated medical infrastructure with the allure of picturesque destinations. This fusion has led to a burgeoning market, capable of significantly impacting national economies while facilitating cross-cultural interactions, the exchange of knowledge, and the enhancement of healthcare infrastructure.

The OIC region possesses a rich tapestry of landscapes, traditions, and medical expertise. However, despite these inherent advantages, the full potential of health tourism in many OIC countries remains untapped. By analysing the existing landscape of health tourism, unravelling the underlying forces influencing its growth trajectory, and accentuating the role of digital transformation in this sphere, the first part of the report presents valuable insights capable of guiding policy formulation, industry stakeholders, and prospective investors toward harnessing the latent potential of health tourism in OIC countries. Moreover, through an exhaustive examination of the experiences of selected OIC countries, it provides an overview of challenges and opportunities in this niche market.

In essence, this part of the report serves as a strategic roadmap for unlocking the symbiotic relationship between the burgeoning tourism and healthcare sectors in OIC countries. It illuminates a path that leads not merely to economic prosperity, but also to an enriched cross-cultural comprehension and sustainable development.

To realize this vision, the subsequent chapters of the report delve into the intricate tapestry of health tourism. This Chapter looks into basic concepts of health tourism, encompassing the emergent drivers of demand and supply. Chapter 2 paints a comprehensive picture of the current status of health tourism and unveils the recent trends shaping its trajectory. Shifting focus to the investment ecosystem sustaining the growth of health tourism, Chapter 3 delves into this critical aspect. Chapter 4 scrutinizes the influence of digitalization in the health tourism sector. Lastly, Chapter 5 offers an intimate glimpse into the experiences of selected six OIC countries namely Mozambique, Senegal, Qatar, Türkiye, Tunisia and Malaysia, thereby providing a nuanced perspective on the challenges, achievements, and invaluable insights garnered from their forays into the realm of health tourism.

Chapter 1

1. UNDERSTANDING KEY CONCEPTS IN HEALTH TOURISM

The primary objective of this chapter is to provide a deep understanding of the essential elements that form health tourism. It begins by providing a precise definition of health tourism and explaining its significance within the broader tourism landscape. Through an examination of the definition, importance, and conceptual framework, a solid understanding of the core principles and objectives that shape this form of tourism will be acquired.

Subsequently, the chapter focuses on assessing the market size of health tourism, considering global perspectives. A comprehensive understanding of the market size offers valuable insights into the scale and scope of health tourism, facilitating strategic planning and decision-making processes for industry stakeholders.

Given the continuous growth of health tourism, it becomes imperative to identify and understand the emerging drivers of demand and supply in this sector. The third section of this chapter investigates the diverse factors pushing the growth of health tourism by defining the factors influencing the availability and accessibility of healthcare services. An in-depth analysis of these drivers sheds light on the underlying forces shaping the demand for and supply of health tourism experiences.

However, it is equally important to acknowledge and address the significant issues of concern within the area of health tourism. The fourth section of this chapter examines the ethical and legal considerations, quality of healthcare services, and safety and security concerns associated with health tourism destinations. Through a critical evaluation of these issues, stakeholders gain a deeper understanding of the challenges and can develop effective strategies to mitigate potential risks. Lastly, this chapter concludes by summarizing key findings and providing future outlooks for health tourism.

1.1 Definition, Importance and Concept

Health tourism has emerged as a growing niche market within the tourism industry. This section provides a comprehensive understanding of the definition, importance, and conceptual framework that underpin health tourism.

1.1.1 Definition of Health Tourism

Health tourism is a type of tourism in which individuals travel between countries or regions in order to receive health services or participate in health-related treatments. It involves individuals seeking medical care outside their own country due to various reasons, including lower costs, better access to specialized treatments, shorter waiting times, or a desire for a combined vacation and medical experience. Health tourism encompasses a wide range of medical and wellness services, including elective surgeries, dental procedures, cosmetic treatments, fertility treatments, rehabilitative therapies, and preventive health check-ups.

The United Nations World Tourism Organization (UNWTO) defines health tourism as “a type of tourism where the main purpose is to enhance individuals' physical, mental, and spiritual well-being through engaging in medical and wellness-focused activities. These activities aim to improve individuals' ability to meet their own needs and thrive in their surroundings and society”. Global Wellness Institute (2020)

defines health tourism as "the convergence of industries that provide wellness, healthcare, and travel services, with the aim of enhancing the physical, mental, and social well-being of individuals"

According to the UNWTO and European Travel Commission (2018), health tourism is a broad term that encompasses two main categories: medical tourism and wellness tourism. Medical tourism involves seeking evidence-based medical resources and services for purposes such as diagnosis, treatment, cure, prevention, and rehabilitation. On the other hand, wellness tourism focuses on improving and harmonizing various aspects of human life, including physical, mental, emotional, occupational, intellectual, and spiritual well-being. According to the Global Wellness Institute (GWI, 2018), wellness is defined as the proactive engagement in activities, decision-making, and adopting lifestyles that contribute to achieving a state of comprehensive well-being. This definition emphasizes two crucial aspects. Firstly, wellness is not a passive or stagnant condition but an active pursuit that involves intention, choice, and action. Secondly, wellness is interconnected with holistic health, encompassing various dimensions such as physical, mental, emotional, spiritual, social, and environmental well-being. It recognizes that wellness goes beyond solely focusing on physical health and incorporates a multifaceted approach to achieving overall well-being.

In order for an activity to be considered as health tourism, it must meet certain conditions. Lunt et al. (2011) have described these conditions as follows:

- **Health care:** The main purpose of the activity is to improve, diagnose or treat the health status of individuals. This may include medical or surgical services performed in hospitals, medical centres, clinics or similar healthcare facilities.
- **Travel:** Health tourism requires individuals to travel from their home country to another country or region to receive health services. This trip includes the stay of the patient and/or their relatives for a certain period of time.
- **Tourist experience:** Health tourism offers touristic experiences as well as health services. Patients and their companions can participate in touristic activities, visit touristic places or have the opportunity to rest during their stay in the health tourism destination.
- **Movement across borders:** Health tourism is an activity that takes place between different countries or regions. Such tourism activities involve access to healthcare from one country to another and often require international travel.
- **Health tourism has been attracting great interest and growing in recent years.** In this area, different countries have increased their efforts to develop and market health services to attract health tourists. However, for the success and sustainability of health tourism activities, it is important to consider factors such as providing quality health services in accordance with international standards, adherence to ethical principles and patient safety.

These definitions highlight the key elements of health tourism, including traveling to another country for medical purposes, seeking specialized medical care, and combining the medical experience with tourism activities.

Table 1. Types of Health Tourism

Types of Health Tourism				
Wellness Tourism			Medical Tourism	
Holistic	Leisure	Medical Wellness	Medical	Medical
Spiritual	Beauty Treatments	Therapeutic Recreation	Rehabilitation (Illness related)	Cosmetic Surgery
Yoga & Meditation	Sport & Fitness	Rehabilitation	Healing Recuperation	Dentistry
New Age	Pampering	Occupational Wellness		Operations

Source: Csapo & Marton (2017)

Health tourism is a multifaceted phenomenon that can include various types of medical procedures, wellness activities, and services. These may range from specialized surgeries, dental treatments, and fertility procedures to wellness retreats, spa therapies, and holistic treatments. The scope of health tourism is not limited to a specific set of services but rather encompasses a wide range of options based on individual preferences and needs (Table 1).

The defining characteristic of health tourism is the combination of healthcare services with travel and leisure experiences. It enables individuals to receive health care while exploring new destinations, immersing themselves in different cultures, and enjoying tourism activities. Health tourism can take place within a domestic context (in-country health tourism) or involve international travel to seek medical care (cross-border health tourism). In this report, international (cross-border) health tourism is considered.

1.1.2 Importance of Health Tourism in the Tourism Industry

Today, health tourism has become a global tourism trend and is an important sector that attracts the attention of many countries. Health tourism involves individuals traveling to different countries or regions for access to health services and solving their health problems. This type of tourism brings many advantages and offers important opportunities for both individuals and destination countries.

Health tourism has a great importance in terms of providing fast access. In many countries, the process of accessing health care can be long and complex. However, health tourism offers an alternative option where patients can respond to their needs more quickly and reduce waiting times. Traveling to different countries, especially in cases requiring emergency treatment or for treatments that require special expertise, enables patients to access healthcare services more quickly and effectively. This helps patients to solve their health problems in a timely manner and improves their quality of life.

Moreover, health tourism has the advantage of providing high quality health services. Some countries have well-known and reputable health institutions for health tourism, especially in the fields they specialize in. These institutions are managed by doctors and health professionals who are experts in their fields and are equipped with the latest medical technology and innovative treatment methods.

Therefore, in the preferred destinations for health tourism, patients can receive high-quality health services and have the assurance of solving their health problems effectively (UNWTO, 2018).

Perhaps most importantly, health tourism offers cost advantages. While the costs of health services in some countries can be high, health tourism destinations usually offer more affordable prices. This allows health tourists to receive the same quality health services more economically. In addition, health tourism can be a sector that stimulates economic growth for many countries and can increase tourism revenues (Lunt & Carrera, 2010).

1.1.3 Conceptual Framework of Health Tourism

Health tourism involves individuals traveling to another country or region to seek medical treatment, wellness services, or specialized healthcare procedures. It encompasses a wide range of medical and wellness-related activities, including medical treatments and procedures as well as wellness activities aimed at promoting overall well-being.

Smith and Puczko (2014) define health tourism as a type of tourism where individuals travel for health purposes and stay in a different place to receive health services. This definition highlights two important components of health tourism: health travel and access to health services. Health tourism also offers benefits to both patients and destination countries. Patients can access cost-effective treatments, reduced waiting times, advanced medical technologies, personalized care, and the opportunity to combine healthcare with leisure travel.

The international academic community has recently introduced the concept of health tourism, which refers to the practice of traveling to other countries for medical treatment, often driven by lower costs or to avoid waiting lists in the home country (Stojanović, Stojanović, & Randelović, 2010). Connell (2006) and Hunter-Jones (2005) consider health tourism as an emerging niche sector, fostering the development of a global service offering. This phenomenon is seen as an innovative product primarily developed by the hotel industry, including the concept of healthcare hotels (Han, 2013), as well as medical organizations (Heung, Kucukusta, & Song, 2011). It caters to both national and international tourists and, in some regions, serves as an alternative to the seasonal nature of tourism demand. Consequently, the role of intermediaries such as medical tourism companies has gained prominence (Connell, 2013). According to Lee and Li (2019), the concept of health tourism is based on the relationship between the natural environment and humans. When traveling to a health tourism destination, tourists respond to the environment by feeling comfortable or stimulated, without direct medical treatment or healing.

Health tourism combines elements of travel, healthcare, and hospitality, requiring coordination between healthcare providers, travel agencies, and hospitality services. The destination chosen for health tourism should have reputable healthcare facilities, well-trained medical professionals, and a supportive infrastructure. Destination countries can experience economic growth, job creation, and increased revenue from healthcare services and associated industries. However, individuals considering health tourism should carefully evaluate the risks, benefits, and legal aspects involved. Researching the destination's healthcare system, verifying healthcare providers' credentials, considering travel logistics, and ensuring appropriate insurance coverage are crucial steps.

The health tourism industry encompasses various dimensions that shape its conceptual framework. These dimensions include the destination chosen by health tourists, the collaboration between service providers, effective marketing and promotion strategies, and regulatory and ethical considerations.

The choice of a health tourism destination depends on several factors, such as the reputation and quality of healthcare services, cost-effectiveness, geographical location, cultural appeal, and safety and security considerations. Destinations that offer excellent healthcare facilities, well-trained medical professionals, and attractive tourism offerings tend to attract more health tourists (COMCEC, 2020).

Health tourism involves the collaboration of various service providers, including hospitals, clinics, specialized medical centres, wellness retreats, travel agencies, hotels, transportation providers, and insurance companies. Seamless coordination and integration among these stakeholders are essential to provide a holistic and satisfactory health tourism experience.

Effective marketing and promotion strategies are crucial for attracting health tourists. This can be achieved through targeted marketing campaigns, online platforms, partnerships with travel agents, and the utilization of medical tourism facilitators. Key factors in marketing health tourism include showcasing expertise, accreditations, success stories, patient testimonials, transparent pricing, and emphasizing the unique attractions of the destination (UNWTO, 2018).

Regulatory and ethical considerations play a vital role in health tourism. Governments and regulatory bodies establish legal, ethical, and safety guidelines to ensure patient safety, quality of care, accreditation of healthcare providers, and adherence to ethical practices. Proper regulations and monitoring mechanisms are necessary to maintain patient trust and protect their rights.

In conclusion, health tourism has transformed the way individuals seek medical care and pursue wellness services. It is driven by factors such as cost-effectiveness, access to specialized treatments, and the desire for overall well-being. Careful planning and consideration of the destination's healthcare infrastructure are essential to ensure a successful and safe health tourism experience.

1.2 Market Size

Health tourism, sometimes referred as medical tourism, has gained significant traction in recent years as an emerging industry catering to individuals seeking healthcare services beyond their home countries. This industry encompasses a wide range of medical treatments, including elective surgeries, specialized procedures, and wellness services. In this subsection an overview is presented on the global health tourism market.

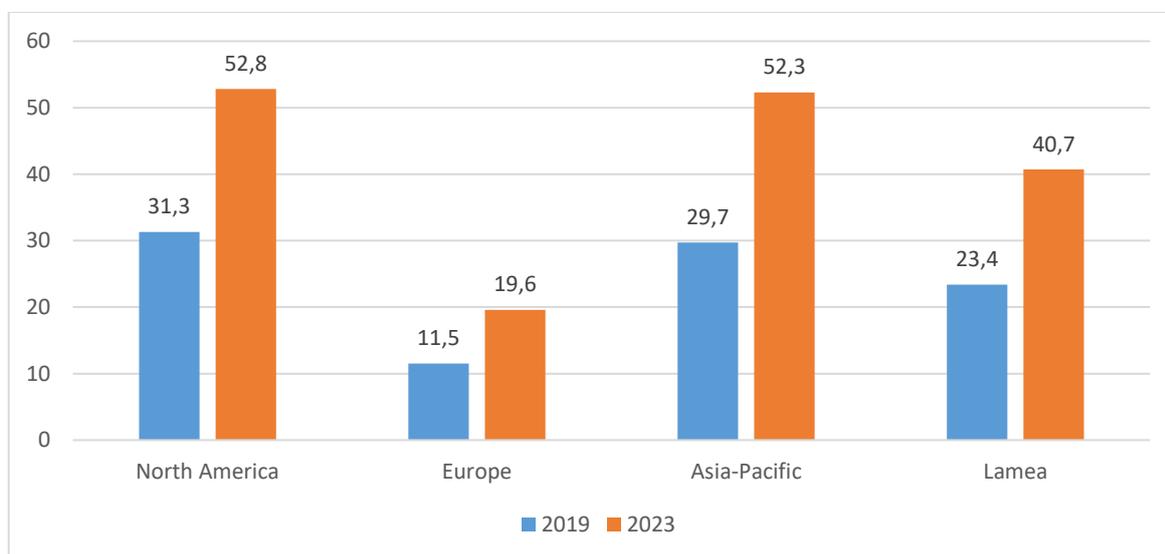
1.2.1 Global Health Tourism Market

The economic value of health tourism is obtained from all expenditures, including health, accommodation, transportation, food and beverage, made by visitors coming for health purposes. However, as in tourism, all of these expenditures of tourists coming for health tourism services cannot be identified properly and accurately. The lack of a unified definition of health tourism makes it difficult to collect official statistics. This poses problems in calculating the direct net contribution of health tourism to the economy. However, data records on health tourism are increasing day by day, and the presence of many institutions that conduct research on the market provides some estimations on the market size.

The global health tourism market has experienced remarkable growth over the past decade, driven by factors such as rising healthcare costs in developed countries, advancements in medical technology, and increasing accessibility to international travel. Patients can often find high-quality medical services at significantly lower prices in countries such as India, Thailand, UAE, Morocco, Tunisia, Senegal, Brasil, Mexico and Türkiye, resulting in substantial cost savings.

According to a report by Transparency Market Research, the global medical tourism market was valued at \$ 10.4 billion in 2021 and is projected to reach \$ 72.8 billion by 2031, with a compound annual growth rate (CAGR) of 13% from 2020 to 2031. On the other hand, Statista estimates medical tourism’ value at \$ 54.4 billion in 2020 and expects to reach a market size of over \$ 200 billion by 2027. Business Research Company values health tourism market currently at \$ 35.77 billion in 2022 and expects to reach \$ 54.43 billion in 2026. This represents a compound annual growth rate (CAGR) of 11% during the forecast period.

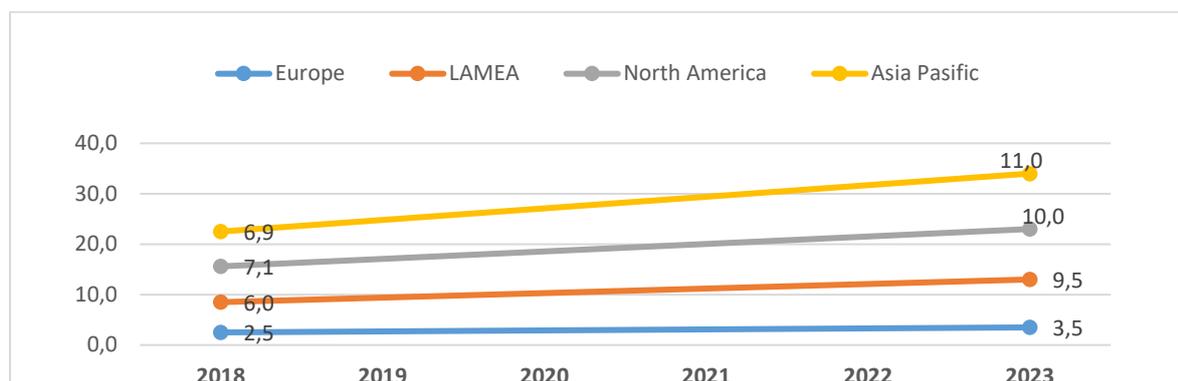
Graph 1: Medical Tourism Regional Market Size between 2019-2023 (\$ billion)



Source: Allied Market Research, PwC Analysis. Note: LAMEA stands for Latin America, Middle East and Africa.

The Asia-Pacific and Latin America-Middle East-Africa (LAMEA) regions are experiencing the fastest growth between 2019 and 2023, 15.5% and 15% respectively, in terms of market size. The market size of North America, the leader in market size, has jumped from \$ 31.3 billion in 2019 to \$ 52.8 billion in 2023, where in Asia-Pacific it went up from \$ 29.7 billion to \$ 52.4 billion. However, among these markets North America is the slowest growing market with a pace of 14.2% in the same period. In addition, although Europe’s market size growth rate is 14.6%, it lags far behind its competitors in this field that Europe reached only \$ 19.6 billion in terms of the market size in 2023, which is less than half the size of its competitors (Graph 1).

On the other hand, projections for the medical tourist numbers during 2018-2023 period indicate that the LAMEA region is poised to be the fastest-growing region, with an annual growth rate of 9.8 %, reaching a significant milestone of 9.5 million medical tourists by 2023. North America is expected to attract approximately 10 million medical tourists in 2023 with an estimated growth rate of 9.5 % in the same period. The Asia Pacific is the leading destination for medical tourists that is estimated to host approximately 11 million medical tourists in 2023 (Graph 2).

Graph 2: Medical Tourism Regional Market Size by Number of Patients (in millions)


Source: Allied Market Research

In 2019, North America held the leading position in terms of its market size and medical tourist arrivals for all treatment types except for neurological treatment. However, the Asia-Pacific and LAMEA regions have emerged as strong competitors, posing a threat to North America's market leadership due to their rapid growth in all treatment categories. Asian medical professionals have gained recognition as experts within the global healthcare provider community, fostering trust in the services offered in the region (COMCEC, 2020).

The Asia-Pacific region has established itself as a new market leader, with projected growth rates of 16 % in cardiovascular treatment, 15.4 % in cancer treatment, and 15.5 % in neurological treatment. The growth trends in foreign patients seeking treatment in the Asia-Pacific region indicate improvements in the region's capacity for neurological, cancer, and fertility treatments, influencing the destination preferences of medical tourists (Table 2).

Table 2: Market Growth Trends by Treatment Type

Market Growth Trends by Treatment Type (CAGR of 2019-2023)				
Treatment	North America	Europe	Asia-Pacific	LAMEA
Cardiovascular Treatment	14.1%	14.4%	16.0%	14.1%
Orthopedic Treatment	13.8%	14.2%	14.9%	14.8%
Neurological Treatment	14.4%	14.8%	15.5%	15.4%
Cancer Treatment	14.3%	14.7%	15.4%	15.2%
Fertility Treatment	14.0%	14.4%	15.1%	15.0%
Other General Treatments	12.5%	12.8%	13.5%	13.4%

Source: Allied Market Research, PwC Analysis

On the other hand, the LAMEA region is emerging as a rising star in the medical tourism market. South Africa serves as a key destination for many African medical tourists who can afford international travel. Additionally, the United Arab Emirates and Jordan offer medical services to patients from neighbouring Middle Eastern and North African countries (Sumant & Shaikh, 2017).

Europe is a prominent destination for medical tourists seeking treatments for cardiovascular and neurological diseases. Sumant & Shaikh (2017) attributes Europe's success as a result of the region's high level of expertise, experienced personnel, and advanced equipment. Cancer patients also prefer Europe due to the favourable living conditions provided during the lengthy healing process. France and Germany, in particular, offer specialized medical services supported by advanced technology, attracting numerous patients seeking heart bypass surgeries, valve replacements, and brain and spinal surgeries. Türkiye, another noteworthy country, is preferred by medical tourists, especially for fertility treatments and general medical procedures (Table 3).

Table 3: Patient Growth Trends by Treatment Type

Foreign Patient Growth Trends by Treatment Type (CAGR of 2019-2023)				
Treatment	North America	Europe	Asia-Pacific	LAMEA
Cardiovascular Treatment	8.9%	9.3%	10.0%	9.9%
Orthopedic Treatment	8.7%	9.0%	9.7%	9.6%
Neurological Treatment	8.1%	11.2%	10.7%	10.2%
Cancer Treatment	9.2%	9.6%	10.3%	10.2%
Fertility Treatment	9.0%	9.4%	10.1%	9.9%
Other General Treatments	7.7%	8.0%	8.7%	8.6%

Source: Allied Market Research, PwC Analysis

On the other hand, some of member countries are increasingly becoming popular destinations for health tourism. Malaysia, UAE, Türkiye, Qatar, Senegal, Morocco, Tunisia and Indonesia are among the global leading countries in this field and they have been actively promoting health tourism.

Malaysia offers a wide range of medical services, including fertility treatments, cardiac surgeries, and cosmetic procedures. The country's medical facilities are renowned for their quality, and the cost advantage attracts patients from neighbouring countries. In 2022, Malaysia hosted 850,000 healthcare traveller and generated MYR 1300 million income. General Health Screening, Cardiology, Fertility, Oncology and Orthopaedics are among the top treatments received by these patients (Malaysia Health Travel Council, 2023).

The UAE has invested heavily in developing world-class healthcare facilities and promoting medical tourism. The country offers specialized treatments in areas such as oncology, orthopaedics, and rehabilitation. The UAE's focus on luxury healthcare experiences, combined with its tourism attractions and modern infrastructure, positions it as an attractive health tourism destination. In 2021, Dubai received 630,000 medical tourists who spent AED730 million. The majority of the health tourists who came to Dubai were from Asian countries, accounting for 38 of the total, whereas 24% were from Europe and 22% from Arab and GCC nations (Media Office, Government of Dubai, 2022).

Türkiye has witnessed significant growth in health tourism, particularly in the fields of cosmetic surgery, hair transplantation, and eye treatments. The country's strategic location at the crossroads of Europe and Asia, along with its advanced medical infrastructure, contributes to its appeal as a health

tourism hub. According to the Turkish Statistical Institute (TURKSTAT), 1,258,382 people came to our country to receive health services and the income obtained from this amounted to \$2.12 billion in 2022 (USHAŞ, 2023).

Furthermore, prior to the COVID-19 pandemic, Jordan, a major destination for medical tourism, received over 250,000 foreign patients per year and generating over \$1 billion in revenue annually. This represented a significant %age of the country's tourism revenue (The International Trade Administration - Jordan Commercial Guide, 2022).

Azerbaijan is a well-known destination for wellness tourism, with its unique and globally recognized wellness tourism destinations. The medical tourism market in Azerbaijan is still emerging, but in 2018, the country generated \$ 2.9 million from health-related travel exports (ITC Trade Map). Saudi Arabia, on the other hand, has been a destination for Muslim pilgrimages for years because of the two holy cities of the Islamic faith, Mecca and Medina. Within the scope of Vision 2030, with an investment of \$ 65 billion in the field of health, Saudi Arabia aims to become one of the leading countries in this field in the coming period (The International Trade Administration – Saudi Arabia Commercial Guide, 2022).

These examples highlight the diverse opportunities and strengths of OIC countries in the field of health tourism. By capitalizing on these strengths and aligning with improvements, OIC countries can unlock their tourism potential and establish themselves as leading destinations for health tourism.

1.2.2 Growth Potential and Projections

The global health tourism market has witnessed remarkable growth in recent times, attributed to factors such as escalating healthcare expenses, advancements in medical technology, and the surge in international travel. This industry is expected to continue expanding significantly in the coming years. It is crucial for governments, healthcare providers, and tourism stakeholders to acknowledge the potential of health tourism and work together to foster sustainable growth, ensure high-quality patient care, and generate positive economic outcomes.

The global health tourism is under the influence of various factors. These factors encompass the rising demand for affordable medical procedures, advancements in technology and treatments, the increasing acceptance of cross-border healthcare and popularity of wellness services especially among elderly people. Many countries are trying to attract the attention of foreign patients by offering touristic opportunities as well as health services. The future growth prospects of this sector seem quite promising.

Primarily, the growth prospects in the health tourism sector are driven by the growing world population and ever-increasing healthcare needs due to an aging population. With the increase in the elderly population in many developed countries, the demand for medical services is also increasing. However, the high costs of health services in these countries direct some patients to other countries where they can get health services at more affordable prices (COMCEC, 2020).

At this point, the potential for health tourism in developing countries emerges. These countries have the capacity to provide high quality health services at lower costs. Connell's study "Medical Tourism" (2013) deals with the potential of health tourism and strategic planning in developing countries. These plans include the development of health tourism infrastructure, training of health personnel and raising quality standards. For example, countries such as India and Thailand are prominent destinations in medical tourism. These countries offer an attractive option for foreign patients with

their modern healthcare infrastructures, experienced doctors and specialist healthcare personnel. Therefore, the growth potential in the health tourism sector in developing countries is quite high.

In addition, technological advances are expected to positively affect the health tourism sector. Advances in medicine make it possible to perform more complex and specialized medical procedures. This causes some patients to prefer the health tourism option. For example, certain countries are preferred for highly specialized procedures such as organ transplants, heart surgeries or cancer treatment. Moreover, some countries are making strategic plans to be more competitive in this sector. These plans include the development of health tourism infrastructure, training of health personnel and raising quality standards.

Furthermore, the COVID-19 pandemic has emphasized the need for resilient healthcare systems and the importance of cross-border collaboration. The COVID-19 pandemic triggered a rapid and widespread adoption of digital platforms across various aspects of life. Virtual classrooms, remote work meetings, online exercise classes, zoom parties, virtual concerts, and hybrid events like weddings and funerals became the new norm. This crisis has also accelerated the adoption of telemedicine and digital healthcare solutions in the health sector, which may further enhance the accessibility and convenience of health tourism in the future (GWI, 2021).

As a result, the health tourism sector has a significant potential with future growth prospects. Increasing health needs increase the potential of health tourism in developing countries. Technological advances are also supporting this industry and providing options for more patients. Researches expect the health tourism sector to continue to grow in the coming years and to become an economically important sector.

1.3 Emerging Drivers of the Demand and Supply

Health tourism has been experiencing rapid growth driven by a number of factors that shape both the demand and supply sides of the market. As the demand for healthcare tourism continues to rise, the preferences for destination countries are also changing. Factors influencing the choice of treatment abroad are likely to vary depending on various factors such as quality of treatment, distance from home country, insurance coverage, payment options and regulations concerning health tourism in the patients' home countries. In this globally expanding market, destination countries are exploring strategies to attract more health tourists, while source countries aim to reduce the outflow of their citizens seeking treatment abroad. This subsection examines the emerging drivers that contribute to the demand and supply of health tourism.

1.3.1 Emerging Drivers of Demand

Health tourism has witnessed a substantial rise in recent years as individuals seek treatment beyond their borders. Affordability and availability of medical treatments, waiting times, quality of care, medical innovation capabilities, national health schemes, and the scope of insurance coverage are among the key determinants that significantly stimulate individuals' decisions to embark on health tourism (COMCEC, 2020). Glinos et al. (2006) have identified five drivers that contribute to the increasing demand for medical services overseas: familiarity, availability, cost, quality, and bioethical legislation. These drivers encompass various factors i.e., international travel for fertility services and treatment. Familiarity plays a role, as expatriates often seek medical care during their visits to their home country, which can be considered a form of medical tourism. For instance, the large Indian Diaspora in the UK may contribute to medical tourism between the two countries.

The unavailability or long waiting times for certain treatments in one's home country can drive individuals to seek medical care abroad, especially when the destination offers the latest technology and techniques. Additionally, some medical treatments may not be legally available in the country of origin, leading individuals to explore options overseas. The desire for privacy and the opportunity to combine medical procedures with traditional tourist attractions, hotels, climate, food, and cultural visits are also considered significant contributing factors to the growth of this market (Connell, 2006; MacReady, 2007; Ramírez de Arellano, 2007).

The factors determining the demand in health tourism can be listed as follows:

1.3.1.1 Drivers of Demand of Patients

There are several factors that contribute to the significant number of individuals traveling abroad for health treatments. These factors include cost-effectiveness, improved quality of care, reduced waiting times, availability of specific treatments, access to alternative therapies, and the presence of natural resources that enhance healthcare outcomes. If examine these factors that affects the demand of patients;

- **Limited healthcare services in the home country:** Individuals may opt for health tourism when their home country lacks specialized treatments or procedures (UNWTO, 2018). The absence of adequate healthcare services in their home country due to a lack of technology and equipment acts as a significant motivating factor for patients to travel to foreign countries in search of healthcare and medical treatments. (Altin, et al. 2011)
- **More up-to-date technology and better treatment quality:** Health tourists are attracted to destinations that offer advanced healthcare technology, including cutting-edge procedures and modern treatment methods. The presence of technologically proficient doctors, surgeons, and supporting staff further enhances the appeal for these individuals seeking cutting-edge treatments. (Connell, 2013).
- **Cost:** Health tourism can provide cost savings, particularly when medical procedures are significantly cheaper in the destination country. Insurance companies may also encourage patients to seek treatment abroad to reduce healthcare costs (UNWTO, 2018). In addition, the rising healthcare costs in developed countries have made healthcare services in developing nations increasingly competitive. The relatively lower expenses associated with surgeries and critical care in these developing countries have positioned them as appealing destinations for medical tourism (Bookman & Bookman, 2007; Bochaton & Letebure, 2009).
- **Capacity constraints and waiting times:** Overburdened healthcare systems in developed countries have resulted in prolonged waiting periods for medical treatments and procedures. Consequently, patients are increasingly inclined to seek medical care services abroad. The absence of waiting time is a particularly enticing factor that attracts global health tourists to countries where procedures such as heart surgery, kidney care, cancer treatment, knee/hip/joint replacements, dental procedures, cosmetic surgeries, weight loss surgery, and more can be performed without delays. Health tourism offers patients the opportunity to bypass these waiting lists and receive timely care (Hanefeld et al., 2013; Singh, 2019).
- **Expertise and specialized healthcare:** Seeking renowned specialists and medical facilities that have expertise in specific treatments or conditions motivates individuals to choose health tourism

(Johnston et al., 2016). Countries that possess an ample number of competent and capable healthcare professionals, including doctors, nurses, and paramedics, who are proficient in adopting new technologies, innovation, and modern treatment methods, are likely to experience a substantial surge in the influx of medical tourists seeking medical treatment and surgeries (Singh, 2019). Moreover, the proficiency in language exhibited by doctors, nurses, and other supporting staff, including travel professionals, plays a significant role in driving health tourists to choose a particular destination for their medical care.

- **Patient Awareness:** The internet has empowered patients to become more informed about healthcare options. Informed consumers actively explore health tourism as they search for the best available treatments and providers globally (Connell, 2013).

- **Privacy and confidentiality:** Health tourism provides a haven for individuals who prioritize privacy and confidentiality, particularly for procedures that carry social stigma or require discretion. Being away from familiar people is a desirable choice when health tourists seek medical treatment as privacy is maintained (Horowitz and Rosensweig, 2007). For instance, individuals who wish to undergo beautification and fat reduction treatments may prefer to keep such procedures private. Traveling to another country for treatment allows them to combine it with a vacation, returning home with a refreshed appearance without divulging their intentions to others. This phenomenon becomes a significant driving force, acting as an important factor that motivates people to pursue healthcare services in foreign countries.

- **Travel opportunities and cultural experiences:** Combining medical treatment with travel experiences appeals to individuals who seek both healthcare and the chance to explore new cultures and destinations (Smith & Puczko, 2009). The availability of tourism facilities and opportunities is also a source of motivation among tourists while choosing the destination. Factors such as the presence of historical places, beaches, quality hotels and good local cuisine options in or around the destination where health care will be received affect the preferences of patients in health tourism. Tourists, especially those who come for aesthetic and dental treatments, also want to take advantage of the opportunity to have a holiday simultaneously with health services.

1.3.1.2 Destination Country Point of View

Health tourism has emerged as a rapidly expanding industry that brings both advantages and challenges to both the source and destination countries involved. When considering the perspective of the destination country, health tourism offers a range of benefits, including the potential for increased income, employment opportunities, spillover effects, and an enhanced reputation.

- **Income & Employment:** Health tourism stimulates economic growth and job creation in host countries, with a particular focus on the healthcare and tourism sectors (Connell, 2013). The substantial economic growth experienced by service countries is driven by expenditures on health equipment, medical services, accommodation, transportation, and food and beverage. This not only contributes to the revitalization of the tourism sector but also enhances healthcare services. The income generated from health tourism plays a crucial role in supporting the local economy and generating employment opportunities. In recent years, there has been a noticeable increase in employment in sectors such as tour operators and transportation companies directly involved in catering to health tourism.

- **Reputation and country image:** Health tourists are motivated to use services of hospitals which have excellent. A positive reputation for delivering high-quality healthcare attracts international patients and enhances a country's image as a reliable healthcare destination (Hanefeld et al., 2013). Countries that are famous for health tourism can transfer other characteristics of their countries to people who come for treatment over time. The country image, which has been provided for many years, provides confidence for patients not only in health but also in other hospitality areas.
- **Spillover effects for the host country:** Health tourism offers benefits to the host country's economy beyond the healthcare sector, leading to increased activities in ancillary services such as accommodation, transportation, and retail (Johnston et al., 2016). In addition to this, many start-ups have started to operate recently to serve health tourism. In particular, health tourism marketplaces have been a very useful platform for patients, and such places have started to receive investments from the private sector (Financial Express, 2022).

1.3.1.3 Demand by the Source Country

A set factors drive the demand by the source country, which can be grouped as follows:

- **Quick response to acute and chronic problems:** Health tourism provides patients with timely access to medical care, addressing both acute and chronic health issues (Lunt et al., 2011). In countries with inadequate healthcare system capacity and limited options provided by private healthcare providers, there is an increased likelihood of patients seeking treatment abroad. As a result, outsourcing healthcare services to other countries helps alleviate the strain on the healthcare infrastructure of the country of origin. Additionally, the lack of specialized expertise in the source country may necessitate patients traveling to destination hospitals in other countries. While this approach provides a quick solution to address immediate challenges, it does not contribute to the long-term development of permanent capacity. Therefore, the benefits derived from this approach can be regarded as temporary.
- **Capacity building and knowledge transfer:** Health tourism promotes knowledge exchange and capacity building in the home countries of medical tourists, contributing to the advancement of medical knowledge and expertise (Smith & Puczeko, 2009). Collaborating with international medical institutions enables healthcare professionals from the sending country to gain exposure to advanced medical techniques, best practices, and innovative research. This acquired knowledge can then be effectively applied to enhance the quality and efficiency of healthcare services in their home country, ultimately benefiting the wider population. For instance, the Open Medical Institute (OMI), established by the American Austrian Foundation (AAF), exemplifies knowledge transfer initiatives by supporting regions with limited healthcare infrastructure, such as Africa, through the provision of skilled physicians and various medical educational programs. These efforts aim to facilitate the long-term development of local capacity (Open Medical Institute, 2011).
- **Wellness Care:** Inadequate wellness treatments or facilities for elderly individuals exist in certain countries. To address this limitation, sending them abroad offers the opportunity to access specialized care that may be unavailable domestically. For instance, some countries may lack advanced rehabilitation centres or wellness programs tailored specifically to the needs of older adults. By facilitating their travel to countries excelling in these areas, elderly individuals can receive optimal care and treatment. Moreover, wellness tourism often emphasizes providing a tranquil and revitalizing experience. Older adults can derive benefits from a change of environment and a respite

from their daily routines. By embarking on wellness tourism abroad, they can immerse themselves in serene surroundings, engage in therapeutic activities, and rejuvenate both their body and mind.

1.2.4 Emerging Drivers of Supply

There are many stakeholders on the supply side of health tourism in particular hotels with spa facilities, wellness hotels, thermal baths, specialized hospitals and clinics, insurance companies and tour operators. While accurately estimating the size of the actual supply is challenging due to the lack of a globally accepted classification of service providers, the hospitality industry has acknowledged the rising demand and interest in health and wellbeing. As a result, an increasing number of operators have either adapted their existing services or introduced new brands that cater to this emerging trend, such as offering healthy options to meet the evolving demand (SESRIC, 2020).

The expanding health tourism industry have led to the pursuit of a lucrative market by various private and public providers in lower- and middle-income countries, emphasized that these destinations draw inspiration from the strategies employed by affluent private patient hospitals. An illustrative example is the case of Thailand, where the development of medical tourism was driven by the need to bolster the struggling private healthcare sector, as domestic private patients shifted their preference to the publicly funded system (Lunt et al., 2011). This paradigm shift reflects the influence of key emerging drivers shaping the delivery and funding of medical tourism.

As the importance of health tourism increases, service exporting countries or countries that want to enter this category have started to invest in areas such as health and tourism infrastructure, cooperation programs, digitalization, and human capital.

- **Healthcare & Tourism Infrastructure:** Numerous countries are making investments to enhance their healthcare and tourism infrastructure in order to attract medical tourists. This involves constructing modern hospitals, specialized clinics, and wellness centres that are equipped with advanced technologies and facilities as well as construction of airports that will increase passenger capacity, increasing the number of flight destinations, building new and modern hotels and constructing highways and local transportation channels. The presence of such infrastructure significantly improves the supply of health tourism services.

- **Collaboration and Partnerships:** Healthcare providers are increasingly engaging in collaborations and partnerships to offer comprehensive health tourism services. These partnerships may be formed among hospitals, travel agencies, hotels, and other service providers, creating a seamless experience for medical tourists and expanding the availability of services.

- **Accreditation and Quality Assurance:** Accreditation by internationally recognized bodies such as the Joint Commission International (JCI)¹ or the International Organization for Standardization (ISO)² helps healthcare providers establish credibility and adhere to quality standards. Meeting these

¹ JCI is a non-profit, U.S.-based, international accreditation organization that certifies healthcare companies, services, and programs. JCI standards are internationally recognized as a leading healthcare accreditation program for patient safety and quality of care (Joint Commission International, 2023).

² The ISO is a non-governmental organization consisting of 168 national standards bodies that collaborates with experts to create voluntary and consensus-based international standards, promoting innovation and addressing global challenges. ISO 22525:2020 is defining standards in tourism and related services, medical tourism and service requirements (ISO, 2023).

standards enhances the supply side of health tourism by attracting more patients who seek reliable and safe healthcare services. (UNWTO, 2018)

- **Skill Enhancement and Training:** Healthcare professionals continuously strive to improve their skills and knowledge to provide specialized and high-quality services to medical tourists. They participate in training programs, workshops, and collaborations with international medical institutions to develop the expertise required to cater to the specific needs of medical tourists.

Overall, the demand and supply of health tourism are driven by a complex interplay of factors. Patients choose health tourism due to limited services in their home country, access to advanced technology, cost-effectiveness, reduced waiting times, expertise, informed decision-making, privacy, and travel opportunities. On the supply side, health tourism generates income, employment, and reputation benefits for the host countries, while also offering prompt solutions for health problems and opportunities for knowledge transfer. Understanding these drivers is crucial for policymakers, healthcare providers, and destination countries to effectively capitalize on the growing health tourism market.

1.4 Key Issues of Concern

Health tourism has become a thriving industry with both benefits and risks for both the source and destination countries. While the previous section discussed the benefits, it is important to acknowledge the potential risks associated with medical tourism. These risks encompass travel-related complications, concerns about quality of care, and language barrier-related problems. These risks can manifest at various stages, including prior to traveling, during travel, during treatment, and post-treatment. While the emergence of risk due to medical procedures primarily concerns patients and doctors in the destination country, risks occurring during travel are of interest to other stakeholders.

Figure 1: Key Issues in Health Tourism



Thus, risks associated with medical tourism are considered multifaceted and involve multiple stakeholders (COMCEC, 2020). To minimize the impact of these risks, it is crucial for patients and service providers to identify the challenges and potential risks they may encounter. These risks may encompass issues such as access to high-quality services, cost considerations, and treatment-related procedures. The most prevalent risks that patients may face can be summarized as follows (Figure 1):

i. Quality and Safety

Patients travel to abroad in search of medical treatments and procedures that may not be accessible or affordable in their home countries. While certain healthcare facilities and practitioners in popular health tourism destinations maintain high standards of care, others may lack proper accreditation, training, or oversight, potentially putting patient safety at risk. The absence of standardized regulations and variations in healthcare practices across borders further complicate the issue.

Therefore, intermediary agencies play a crucial role in facilitating medical treatments and related services for patients. The reliability of these agencies is vital in ensuring the quality of services provided. To maintain service quality and protect patient rights, authorized intermediary agencies are granted certificates and authorization. Reliable patient feedback is also a reference source for both hospitals and these intermediary agencies.

However, the presence of non-authorized agencies in the sector can lead to unfavourable situations for medical tourists due to mismanagement or mismatched services negotiated prior to the patient's arrival. These situations can have a negative impact on the reputation of the country (COMCEC, 2020). The activities of service providers or unlicensed businesses, if any, that cannot provide sufficient standards in line with the information to be obtained from patients coming for health tourism at the entrance and exit of the country may be suspended or terminated.

On the other hand, collaboration between healthcare providers and policymakers is essential to establish robust quality assurance mechanisms and enhance protocols for patient safety. Suspending the activities of service providers who cannot meet the quality standards by the relevant government institutions is also a solution to ensure the standards in the sector.

ii. Travel Related Complications

Health tourism encompasses both outpatient and inpatient treatments, including procedures that require careful pre- and post-operative care. The hygiene conditions in airports, airplanes, transportation and even hotels can be a potential source of risk for travellers. Moreover, the duration of travel between destinations can pose health risks for patients. Centers for Disease Control and Prevention (2017) asserts factors such as changes in cabin pressure and turbulence during flights can endanger or destabilize a patient's health, particularly when flying after surgery, increasing the risk of blood clots. To mitigate travel-related risks, health tourists often prefer destinations that are closer to their home countries, especially for cardiovascular, neurological, and cancer treatments. The choice of travel distance and destination preferences vary based on the individual's home country and the availability of the desired treatment. For example, patients from North America tend to stay closer to their home country and often choose destinations in Latin America, while Europeans, Africans, and Asians typically travel within Europe and Asia (Sumant & Shaikh, 2017).

iii. Communication Challenges

Effective communication between doctors and patients is crucial in healthcare settings, and the use of a common language plays a significant role in enabling such communication. When patients are fluent in the language of the country where they receive healthcare, it becomes easier for them to express their needs and understand the details of their treatment. However, when there is a language barrier, the risks of miscommunication can lead to additional challenges and complications. Patients

will initially be hesitant to go to a country where their own language or a universal language is not spoken. Therefore, having a shared language is essential to minimize the potential risks and ensure clear and accurate communication between doctors and patients.

Furthermore, the quality of service in medical tourism is also influenced by communication skills and the use of a common language. For instance, a study examining medical tourists from Botswana and Mozambique seeking treatment in South Africa revealed that these individuals were treated as residents of South Africa due to the similarity in language. This language similarity had an impact on the quality of services provided (Crush & Chikanda, 2015). Lunt and Carrera (2011) found that clinic websites that have poor grammar and spelling content, give little confidence in their proficiency in the English language and ability to communicate clearly which results in the dissection of the clinic and destination by patient.

iv. Unexpected Costs

The most commonly preferred solution for booking medical treatments abroad is through intermediary agencies. These agencies handle all the necessary arrangements, including payment methods, which are pre-defined agreements with conditions that are agreed upon and signed upon arrival. However, when the agreement is not approved and secured by both parties involved, there is an increased risk of receiving unexpected medical expense bills. Not only in health care, but also in matters such as accommodation and transfer, asking for a price higher than the promised price or receiving a lower quality service for the price paid affects the preferences of the patients.

v. Continuity of Care

It is important to prioritize the well-being of patients and ensure they receive comprehensive care throughout the entire treatment process. However, when seeking medical treatment abroad, the usual continuum of care may be disrupted. Therefore, it is valuable to take into account the entire cycle of care, including the stages before and after the hospitalization period, to ensure patients receive appropriate advice and support at every step. After receiving treatment abroad, patients may face difficulties in accessing follow-up care and necessary aftercare services once they return to their home country. This can lead to gaps in post-treatment monitoring, follow-up appointments, and rehabilitation support, impacting the overall continuity of care. After returning home, patients bear the responsibility of managing complications, side effects, and post-operative care, which may pose challenges in accessing appropriate healthcare. Boschert (2007) presents an illustrative example is the discomfort that physicians in the US may experience when dealing with patients who have travelled abroad to undergo an organ transplantation.

vi. Medication

Accessing safe medication is an essential aspect of effective medical treatment as medications often complement the overall care. However, the global prevalence of counterfeit medicines or unlicensed medications poses a significant challenge. In countries where medication quality standards are not stringent, patients may encounter hazardous situations due to the use of substandard or unauthorized medications, both during the treatment phase and when following prescribed medications after treatment. In Germany, the Federal Joint Committee plays a pivotal role in establishing regulations pertaining to medication accessibility, healthcare product and service quality, as well as their

efficiency. These collective efforts serve to enhance and uphold the overall quality of medical services provided (COMCEC, 2020).

Since the use of inappropriate medications will cause problems for the patients in the future, it will harm not only the clinic/hospital serving, but also the image of the country and the whole health tourism sector of the country.

vii. Local Healthcare System

Seeking medical treatments abroad can lead to the allocation of limited healthcare resources in destination countries, which may have implications for the access to care for local populations. This ethical dilemma raises concerns about the fairness and equity of health tourism, particularly when it diverts resources away from the needs of the local communities. Policymakers must carefully navigate the balance between promoting health tourism as an economic opportunity while also safeguarding the rights and well-being of their own citizens.

viii. Legal Implications

Navigating legal frameworks related to medical malpractice laws, liability, and patient rights can be challenging when seeking legal recourse or compensation for medical mishaps that occur abroad. It is essential for patients to understand the legal protections and limitations in the destination country. In order to mitigate risks, patients should consider obtaining comprehensive travel insurance that specifically covers potential medical complications (Connell, 2013).

In summary, health tourism encompasses a range of benefits and risks that necessitate careful consideration. While it enables patients to access treatments not available or affordable in their home countries, it also gives rise to significant concerns. These concerns include issues surrounding the quality of care, language barriers, continuity of care, ethical considerations, legal frameworks and etc. It is imperative for patients, healthcare providers, policymakers, and intermediary agencies to collaboratively address these concerns, prioritizing patient safety, service quality, and ethical standards. This can be achieved through the establishment of standardized regulations, improved communication and language support, enhanced continuity of care, and the implementation of ethical guidelines and policies. By effectively addressing these concerns, the health tourism industry can strive to provide safer, more dependable, and equitable healthcare experiences for patients worldwide.

Concluding Remarks

Health tourism can be defined as the act of traveling for health services. This includes patients traveling to another country to seek treatment or maintain a healthy lifestyle. Health facilities serving in this field offer a variety of health services with technological developments, quality service delivery and expertise in their fields of expertise. Services in sub-categories such as aesthetic surgery, medical tourism, dentistry, healthy life and wellness are also included within the framework of health tourism.

The existence of demand and supply-side increasing factors in health tourism plays an important role in the growth of the sector. Technological advances have facilitated access to healthcare and allowed people to travel more. In addition, cost advantages, high-quality services, specialist doctors in their specialties and health facilities with high standards are also factors that affect health tourism. In

addition, the promotional activities of health tourism destinations play an important role in attracting the attention of health tourists.

The size of the health tourism sector shows a constantly increasing trend. The willingness of people to travel with a view to accessing more health services contributes to the expansion of the health tourism market. In particular, health tourism is preferred in developing countries in order to access high-quality health services at more affordable costs. This presents a great opportunity in the health tourism sector.

As a result, health tourism maintains its importance as a rapidly growing and developing sector. Health tourism refers to a broad concept that includes travel for health services and offers various services in sub-categories such as aesthetic surgery, medical tourism, dentistry and wellness. Demand and supply-side factors support the growth of the sector and enable people to prefer health tourism. The size of the sector shows a constantly increasing trend. Health tourism continues on its way as an important sector on a global scale and has the potential to grow even more in the future.

One of the main problems in health tourism is data collection. The size of health tourism and the real value of its contribution to the economy cannot be measured because there is no opportunity to collect healthy data. Studies such as data sharing and digitalization between countries and stakeholders should be initiated in order to more accurately determine the size of health tourism, which is measured by survey-like practices.

Furthermore, quality and reliability issues in health tourism are among the most sensitive issues for patients. Health and tourism ministries should work on the inspection and compliance of hospitals and clinics, and should renew the authorities of these institutions if they meet the quality standards. Information about which clinic or hospital they will be treated in is obtained from the patients coming within the scope of health tourism; control of issues such as quality, competence, price policy and patient satisfaction regarding these institutions should be ensured.

On the other hand, health tourism presents significant opportunities for OIC countries, as it has the potential to bring about substantial economic gains, generate employment prospects, and improve the quality of healthcare services. Nevertheless, there are several pressing concerns that must be addressed in order to fully leverage these advantages. On the demand side, obstacles such as insufficient knowledge, limited accessibility, and lack of confidence in the healthcare systems in some OIC countries may impede the expansion of health tourism. From a supply perspective, challenges such as inadequate infrastructure, complex regulations, and insufficient workforce pose significant barriers.

To overcome these obstacles and unleash the potential of health tourism, OIC countries should implement strategic policy measures. Foremost, it is crucial to establish comprehensive national tourism strategies that specifically focus on health tourism. These strategies should include initiatives aimed at increasing awareness among potential medical tourists, improving infrastructure and facilities, and simplifying regulations to ensure a smooth and effective process.

Collaboration among OIC countries is crucial. They should engage in joint marketing campaigns, establish regional healthcare networks, and harmonize regulations to collectively promote the region as a premier health tourism destination. Cooperation would facilitate knowledge sharing, resource pooling, and the exchange of best practices, enhancing the competitiveness of OIC countries in the

global health tourism market. Investment in healthcare infrastructure, including advanced hospitals and clinics, is vital to enhance the quality of care for medical tourists. This would also attract skilled healthcare professionals and renowned providers, bolstering the overall health tourism ecosystem.

Moreover, OIC countries need to prioritize the development of human resources for health tourism through specialized training programs. This would equip healthcare professionals with the necessary skills and enhance tourism-related competencies among other healthcare workers. Building a skilled workforce and medical infrastructure would create trust and confidence in medical tourists seeking healthcare services.

By implementing these policy recommendations, OIC countries can position themselves as leading destinations for health tourism, capitalizing on their unique cultural, historical, and geographical advantages. This would stimulate economic growth, diversify revenue streams, and drive continuous improvements in healthcare standards. Ultimately, embracing these policies would contribute to the overall well-being and prosperity of the region. OIC Member Countries and Institutions and international partners should develop strategies to enhance the development of health sector and share success stories in OIC Region.

Chapter 2

2. STATE OF HEALTH TOURISM AND RECENT TRENDS

Health tourism has gained significant attraction worldwide in recent years, driven by factors such as rising healthcare costs in certain countries, long waiting times for medical procedures, and the search for specialized treatments not available locally. Patients are increasingly willing to travel abroad to access high-quality healthcare at more affordable prices, while also combining their medical journeys with leisure and tourism experiences.

The global health tourism industry is dynamic and continues to evolve, with ongoing advancements in technology, shifting patient preferences, and emerging trends. Telemedicine and virtual consultations have gained prominence, enabling patients to access healthcare services remotely, particularly during the COVID-19 pandemic. Wellness tourism, focusing on holistic well-being and preventive care, is also on the rise, with travellers seeking rejuvenation, relaxation, and wellness experiences.

Moreover, personalized healthcare experiences have become increasingly important, with patients expecting tailored treatment plans and specialized care. The integration of traditional and alternative medicine practices into health tourism offerings is also gaining popularity, appealing to those seeking holistic and culturally diverse approaches to healthcare.

Briefly, the global state of health tourism is vibrant and continually evolving. Countries around the world are capitalizing on their medical expertise, affordable pricing, and diverse tourism offerings to attract health tourists from various regions. By understanding the trends and preferences of health tourists, destinations can position themselves as competitive players in this dynamic industry, offering high-quality healthcare services and unforgettable experiences for international patients.

2.1 State of Health Tourism

With significant advances in medicine and technology, health tourism has grown to become a multi-billion-dollar globalized industry that connects people to different parts of the world where they can access quality medical care. Today, no less than 20 million people travel across the world every year to receive healthcare services. While precise figures regarding the global health tourism market are unavailable, it is estimated to fall within the range of \$74-92 billion. This estimation takes into account approximately 21-26 million patients who travel across borders to receive medical care, with each visit averaging around \$3,550 in expenses. These costs cover medical expenses, transportation (both local and cross-border), inpatient accommodations, and other related expenditures (Patients beyond Borders, 2022).

Many countries across the globe have recognized the potential of health tourism to boost their economies and have invested in developing world-class medical infrastructure, attracting patients from around the world. Some countries have become well-established health tourism destinations due to their advanced medical facilities, renowned healthcare professionals, and competitive pricing. For example, Costa Rica has emerged as a leading global health tourism destination, renowned for specialized doctors and cost advantage (50-70% cheaper than USA) and its expertise in aesthetic & cosmetic procedures, and dental care. The country offers a wide range of medical treatments and wellness services, attracting patients from North America and beyond (Health-Tourism, 2023). Thailand is another prominent health tourism destination, known for its exceptional medical facilities,

highly skilled doctors, and favourable pricing. The country specializes in a variety of medical treatments, including cosmetic surgery and dental procedures. Thailand's reputation for quality healthcare and its well-developed tourism industry makes it a preferred choice for medical tourists from around the world.

A number of countries have also emerged as global leaders in health tourism, attracting a significant number of international patients seeking high-quality medical services. Among these leaders India is known for its advanced medical facilities, skilled doctors, and cost-effective treatments. India excels in various medical fields, such as organ transplantation, orthopaedics, and oncology, providing international patients with affordable and quality healthcare options. Moreover, Mexico has emerged as a leader in health tourism due to its close proximity to the United States and its affordability for medical and dental procedures. Many individuals from the United States choose to travel to Mexico for cosmetic surgery, dental implants, and bariatric surgeries due to the cost advantages (Sumant & Shaikh, 2017). Brazil has also established itself as a prominent destination for health tourism, particularly for cosmetic procedures and plastic surgeries. The country is renowned for its experienced plastic surgeons and innovative techniques, attracting patients from all corners of the globe (COMCEC, 2020).

Germany has gained recognition for its cutting-edge medical technology and expertise in complex treatments and procedures. The country's healthcare system is highly regarded, and specialized clinics and hospitals offer advanced treatments in fields such as oncology, neurosurgery, and orthopaedics (Medical Tourism Review, 2023). Switzerland is known for its high-quality healthcare services, with a particular focus on rehabilitation and wellness. The country's pristine natural surroundings, coupled with specialized clinics and wellness resorts, make it an appealing choice for medical tourists seeking holistic treatments and wellness programs.

On the other hand, health tourism in OIC countries has experienced steady growth, with several member nations making notable advancements in attracting international patients. These countries understand the potential of health tourism to boost their economies and promote their healthcare sectors. Malaysia, Türkiye, UAE, Saudi Arabia, Morocco, Pakistan, Maldives, Guyana, Suriname, Indonesia, Tunisia, Senegal and other OIC countries have emerged as leading destinations for health travellers. For instance, Malaysia has established itself as a prominent health tourism hub within the OIC region by offering a diverse range of specialized medical treatments at competitive prices. The country boasts modern healthcare facilities, internationally accredited hospitals, and highly skilled medical professionals. Patients seeking procedures such as fertility treatments, cosmetic surgeries, and cardiac care are drawn to Malaysia. Additionally, the country's cultural attractions and natural landscapes provide a well-rounded experience for medical tourists (Malaysia Healthcare, 2023).

The United Arab Emirates, particularly Dubai and Abu Dhabi, has made substantial investments in developing world-class healthcare infrastructure to attract international patients. The country offers a wide range of health services, including specialized treatments in orthopaedics, sports medicine, dermatology and skin care, dentistry and fertility treatment. With state-of-the-art hospitals, renowned medical professionals, and luxury healthcare facilities, the UAE has positioned itself as a premier destination for medical tourism within the OIC region (MOEC, 2022). Türkiye has gained recognition as a preferred choice for health tourism among OIC countries. It provides advanced medical facilities alongside a rich historical and cultural backdrop. Turkish hospitals are renowned for

their expertise in cosmetic surgery, dental treatment and fertility treatments (Health-Tourism, 2023). Positioned between Europe and Asia, Türkiye's strategic location, combined with its affordable healthcare costs, appeals to patients seeking high-quality medical care at competitive prices.

Furthermore, Saudi Arabia with its advanced medical facilities and renowned healthcare professionals, has been attracting medical tourists for various treatments, including organ transplants, neurological rehabilitation and general surgery (Khan & Alam, 2014). The country's emphasis on quality healthcare, combined with its rich cultural heritage, makes it an appealing destination for international patients. Jordan, known for its high standards of healthcare, has become a popular choice for medical tourists seeking specialized treatments such as heart, bone, eye diseases, kidney transplant, weight surgeries and cosmetic surgeries. The country's well-established medical centres and skilled healthcare providers ensure top-notch care for patients (COMCEC, 2020).

Moreover, Morocco has been experiencing notable progress in the realm of health and wellness tourism, leveraging a range of advantageous factors. Its advantageous position close to Western Europe, pleasant climate, and the abundance of affordable flights to the country contribute to its appeal. Additionally, Morocco benefits from a bilingual population fluent in Arabic and French, with Spanish also spoken in the northern regions. This linguistic advantage makes it an exceptionally attractive destination for patients from French-speaking nations as well as Arab countries, which represent a lucrative and increasingly significant source market for the country (Center for Health Tourism Strategy, 2023).

The Maldives presents a tranquil and picturesque environment for wellness tourism. Esteemed for its opulent wellness resorts and spa retreats, the country offers a variety of revitalizing treatments, yoga sessions, and wellness programs set amidst its breath-taking beaches and pristine waters. The unique one-island one-resort concept prevalent in the Maldives sets the stage for a transformative holiday experience that promotes holistic nourishment of the mind, body, and soul (The Edition, 2023). In addition, as part of their economic diversification strategies, governments of several Gulf countries (such as Bahrain, Kuwait, and Qatar) are actively exploring tourism opportunities and investing in extensive resort spa developments. These projects aim to incorporate sustainable building practices, outdoor and fitness amenities, top-tier medical services, alternative and complementary wellness offerings, and various attractions for both residents and tourists. Prominent examples of these initiatives include the Dilmunia Island project in Bahrain, the Kuwait Silk City project, and the Qatar Foundation Stadium and Health & Wellness Precinct/Education City project (GWI, 2018). Furthermore, Qatar will organise the 3rd OIC Tourism Fair on 20-22 November 2023 to explore new market on tourism investment in OIC Zone et enhance its cultural tourism.

These examples showcase the broad spectrum of OIC countries that are proactively fostering health tourism by offering exceptional medical services, state-of-the-art facilities, and captivating tourism experiences for global patients. Through their commitment to quality, these countries aim to attract international visitors seeking top-notch healthcare services combined with memorable travel experiences. By providing a blend of modern amenities, cutting-edge infrastructure, and cultural allure, these OIC countries are establishing themselves as prime destinations for health tourism, catering to the diverse needs and preferences of discerning travellers worldwide.

2.1.1 Medical Tourism Index

The Medical Tourism industry is estimated to be valued at approximately \$100 billion, although there is a lack reliable measurement facility to accurately assess its size and growth. To address this, the Medical Tourism Index (MTI) was developed as a country-based performance measure to evaluate the appeal of a country as a medical tourist destination.

The development of the MTI involved a rigorous 8-step methodology, encompassing statistical and index construction procedures, and engaging multiple stakeholders over several years. The MTI is a comprehensive assessment tool with three main dimensions: country, industry and medical facility, and personal aspects. It consists of 34 underlying indicators, making it the first index of its kind to provide a holistic evaluation for countries, policymakers, healthcare and tourism industries, place marketers, and related organizations.

The MTI serves as a global reference point for assessing the attractiveness of countries as medical tourism destinations. It rates and analyses a country's current state, positioning, and potential for enhancing the well-being of its population through medical tourism. The inaugural publication of the MTI took place in 2014, evaluating 30 countries and comparing 25 of them based on the 34 criteria. The index is based on opinion surveys, but users can also leverage the 'data tool' section to compare MTI values with other secondary data such as population, GDP per capita, Global Competitiveness Index, and Consumer Expenditure on Hospital Services, among others, to uncover new insights.

The MTI provides benefits to multiple stakeholders. It helps governments benchmark and develop strategies to improve their medical tourism industry, aids healthcare providers and insurers in selecting attractive destinations for different consumer segments and assists the travel industry in understanding the positioning of countries for medical tourism. Furthermore, it enables hospitals to assess their position and identify areas for improvement, while also providing valuable data for academic analysis of medical tourism. Overall, the MTI fills a crucial gap by offering insights that inform decision-making, enhance services, and drive the growth of medical tourism destinations.

According to the MTI 2020-2021, Canada was the leading destination in the world among 46 countries, followed by Singapore and Japan respectively. Furthermore, Spain stood as the 4th and United Kingdom 5th as globally medical tourism destination. Of the first 46 countries on the MTI list, 13 are located in the European region, while 8 are located in Asia. There are 10 countries in the Americas (North and South). The region with the highest number of countries is the Middle-East geography with 14 countries. There is only one country in Africa. The reason why health tourism is not directly concentrated in one region and spread to different continents can be shown as the distance from the destination countries. The fact that medical tourism is an important market has led countries to want to get a share from it.

Looking at the OIC countries, 14 of the first 46 destinations in the MTI global ranking are OIC countries. Among these 14 countries, Dubai ranks first (6th in the world). Dubai is followed by another destination in the UAE, Abu Dhabi (9th). In order, Oman (13th), Egypt (26th), Türkiye (30th), Morocco (31th) and Bahrain (32th) follow these countries (Table 4). The fact that OIC countries are so prominent in the MTI ranking shows the intense interest and bold steps taken in these countries. OIC countries have become a centre of attraction for health tourism in the international arena, thanks to the investments made recently.

Table 4: OIC Countries in the Medical Tourism Index

2020-2021 MTI OIC Ranking					
Standing	Country	MTI Rating	Standing	Country	MTI Rating
6	Dubai	71.85	35	Saudi Arabia	63.32
9	Abu Dhabi	70.26	36	Jordan	63.26
13	Oman	69.03	38	Tunisia	61.78
26	Egypt	64.81	39	Qatar	61.13
30	Türkiye	63.91	43	Lebanon	57.14
31	Morocco	63.8	45	Kuwait	54.84
32	Bahrain	63.65	46	Iran	44.38

Source: Medical Tourism Index Report 2020-2021

The MTI findings unveil a multitude of globally competitive destinations across diverse regions, spanning from Africa to Asia, indicating the significant potential for health tourism to serve as a catalyst in the development of countries. By capitalizing on this opportunity, nations can not only generate substantial income but also foster job creation and elevate their international tourism brand value. The establishment of thriving health tourism sectors enables countries to tap into the burgeoning demand for healthcare services, attracting visitors seeking quality medical treatments and consequently contributing to economic growth. Moreover, this industry's expansion creates employment opportunities across various sectors, positively impacting livelihoods and overall prosperity. By positioning themselves as reliable providers of exceptional healthcare services, countries can enhance their international reputation, attracting a broader range of tourists and diversifying their tourism offerings, thereby reinforcing their overall tourism industry and boosting their global standing.

2.1.2 Global Wellness Institute Rankings

The Global Wellness Institute (GWI) is a non-profit organization dedicated to empowering global wellness through disseminating knowledge to public and private sectors regarding preventative health and wellness. GWI's research, programs, and initiatives have played a crucial role in fostering the growth of the wellness economy and facilitating the convergence of the health and wellness industries.

One of GWI's significant contributions is the publication of "The Global Wellness Economy: Country Rankings" report, which offers a comprehensive understanding of the relative strengths of countries' wellness sectors and policies. This report provides a summary analysis of the wellness economy at the regional level for six major regions, accompanied by a detailed data profile of the wellness economy for each region. Through an expanded dataset, which includes a breakdown of the eleven wellness sectors by region and country, GWI enables a comparative examination of the size and composition of the wellness economy across different regions worldwide.

Table 5: Wellness Economy and Size: Top Twenty Markets, 2020

Country	Wellness Economy Size		Gross Domestic Product (GDP)		Population		GDP Per Capita	
	US\$ billion	Rank	US\$ billion	Rank	US\$ billion	Rank	US\$ billion	Rank
United States	\$1,215.7	1	\$20,893.8	1	329.5	3	\$59,886	8
China	\$682.7	2	\$14,866.7	2	1,402.10	1	\$8,760	76
Japan	\$303.6	3	\$5,045.1	3	125.8	11	\$38,903	25
Germany	\$223.9	4	\$3,843.3	4	83.2	18	\$44,637	18
United Kingdom	\$158.4	5	\$2,709.7	5	67.2	21	\$40,350	23
France	\$133.1	6	\$2,624.4	7	67.4	20	\$40,054	24
Canada	\$95.1	7	\$1,644.0	9	38	34	\$45,192	17
South Korea	\$94.1	8	\$1,638.3	10	51.8	27	\$31,601	30
Italy	\$91.8	9	\$1,884.9	8	59.6	23	\$32,649	29
Australia	\$84.4	10	\$1,359.4	13	25.7	46	\$55,915	11
Brazil	\$82.6	11	\$1,444.7	12	212.6	6	\$9,978	70
India	\$77.6	12	\$2,660.2	6	1,380.00	2	\$1,981	128
Russia	\$71.4	13	\$1,478.6	11	144.1	9	\$10,724	66
Spain	\$62.6	14	\$1,280.5	14	47.4	29	\$28,197	34
Mexico	\$46.5	15	\$1,073.9	15	128.9	10	\$9,343	73
Netherlands	\$41.0	16	\$913.1	17	17.4	54	\$48,800	13
Taiwan	\$38.4	17	\$668.2	22	23.8	47	\$25,062	38
Switzerland	\$38.2	18	\$751.9	19	8.6	78	\$83,700	2
Indonesia*	\$36.4	19	\$1,059.6	16	273.5	4	\$3,885	108
Türkiye*	\$34.6	20	\$719.9	20	84.3	16	\$10,629	67

Source: Global Wellness Institute Report February 2022. Note: * OIC member countries

The report ranks 150 countries based on the size of their wellness economies, compares wellness to the overall size of each country's economy, and investigates per capita spending on wellness. Employing basic statistical analysis, depicted through scatterplot diagrams, the study explores various country-level characteristics that exhibit a strong correlation with higher levels of expenditure on wellness. These characteristics include factors such as GDP, population size, per capita income, and the degree of tourism dependence.

According to GWI's Global Wellness Economy February 2022 report, Asia-Pacific, North America, and Europe together account for 90% of the global wellness economy, and all but two (Brazil and Mexico) of the twenty largest wellness markets are located in those regions. The United States is by far the largest market, at \$1.2 trillion in 2020 – nearly double the size of the second largest market (China, at \$683 billion). In fact, the United States accounts for 28% of the entire global wellness economy in 2020. The top ten markets represent 71% of the global total (Table 5).

Table 6: OIC Countries Wellness Economy Size and Rankings

OIC Countries Wellness Economy Size and Rankings Time Series						
Country	2019			2020		
	US\$ billion	Global Ranking	OIC Ranking	US\$ billion	Global Ranking	OIC Ranking
Indonesia	\$40.6	18	1	\$36.4	19	1
Türkiye	\$39.9	21	2	\$34.6	20	2
Malaysia	\$28.7	25	3	\$24.4	26	3
Saudi Arabia	\$16.0	39	5	\$15.2	35	4
UAE	\$17.8	34	4	\$13.9	38	5
Egypt	\$13.7	46	6	\$12.0	43	6
Iran	\$11.5	50	8	\$11.9	45	7
Nigeria	\$12.6	48	7	\$11.4	47	8
Algeria	\$7.1	57	10	\$6.4	56	9
Bangladesh	\$6.2	63	14	\$6.2	57	10

Source: Global Wellness Institute Report February 2022

Among the OIC countries, only Indonesia (17th) and Türkiye (20th) were listed in the top 20 of this ranking. Additional six more OIC countries were placed in the top 50 in the global ranking. These OIC countries are Malaysia (26th), Saudi Arabia (35th), UAE (38th), Egypt (43rd), Iran (45th) and Nigeria (47th). These OIC countries have a number of commonalities. They have a relatively well-developed healthcare system and functioning health infrastructure. Besides, the number of trained health personnel is relatively high in these OIC countries as shown by OIC Health Report 2019 (SESRIC, 2019). Furthermore, while these countries, which are the cradles of many civilizations, have rich natural resources, they also offer wellness tourism opportunities in many areas with their different customs and traditions, cultural texture and social life, and rich history (Table 6).

2.2 Recent Trends in the World

The surge in demand for health services is a key trend influencing the growth of health tourism. While healthcare costs may be prohibitive in some countries, more affordable options are available in other nations. Consequently, health tourism presents an appealing choice for individuals seeking to reduce expenses and improve access to high-quality healthcare. The COVID-19 pandemic has also impacted the health tourism industry, leading to a temporary decline in international travel for medical purposes. However, as travel restrictions ease and vaccination rates increase, the industry is expected to rebound and experience renewed growth. The global medical tourism market is projected to reach a value of \$273.72 billion by 2027, growing at a CAGR of 12.8% from 2019 to 2027, according to a report by Allied Market Research (2020).

Technological advancements constitute another trend that impacts health tourism. The development of medical technologies and treatment methods enables people to access more effective and reliable healthcare services. Due to pandemic, the integration of technology in healthcare, such as telemedicine and virtual consultations has accelerated. In a survey conducted by McKinsey, 76% of respondents expressed interest in telehealth services, highlighting the growing acceptance and demand for remote healthcare options (Bestsenyy, Gilbert, Harris, & Rost, 2021). Moreover, innovations like robotic surgery, laser treatments, and genetic testing are among the preferred

services sought by health tourists. These technological advancements encourage individuals to embark on health tourism journeys.

The trends in medical tourism are influenced by the types of treatments and services that are in high demand among international patients worldwide. In COMCEC (2020) report, these trends can be grouped into distinct categories based on their shared characteristics. For instance, certain procedures may be necessary due to health conditions, while others may be sought after primarily for cosmetic reasons. Additionally, there are cases where medical needs coincide with cosmetic procedures, such as in dental treatments and plastic surgeries. Therefore, medical tourism trends can be classified into three main categories: trends driven by medical necessities, trends driven by cosmetic preferences, and trends that combine both medical and cosmetic motivations (Table 7).

Table 7: Trends in Medical Tourism

	Medically Driven Trends	Cosmetically Driven Trends	Medically and Cosmetically Driven Trends
Surgical Procedure	<ul style="list-style-type: none"> • Cardiology • Neurology • Orthopedy 	<ul style="list-style-type: none"> • Facelift • Hair transplant 	<ul style="list-style-type: none"> • Eye surgery (Lasics, etc.) • Dental surgery (Impant, etc.)
Non-Surgical Procedure	<ul style="list-style-type: none"> • Cancer Treatment • Burn treatment 	<ul style="list-style-type: none"> • Botox and Filing 	<ul style="list-style-type: none"> • Eye consultation • Dental consultation
Top Destinations	USA, Canada, India, Malaysia, Turkey, Mexico, Costa Rica	Turkey, Germany and Spain	Thailand, Brazil, Poland, Czech Republic and Turkey
Nationality of Patients	Middle East, Africa and North America	Middle East and Europe	USA, Gulf countries, and Europe (especially from the UK), Nordic countries and Scandinavia

Source: International Medical Travel Journal PwC Analysis

Not only the medical tourism is on the rise but also the global wellness tourism market grows at a rapid pace. The Global Wellness Summit's Future of Wellness Report (2023) predicts the newest directions in wellness, has identified 12 wellness trends for 2023. Some of the key trends are: wellness & gathering, wellness & travel, wellness & workplace and wellness & cities. The report highlights several overarching themes, including a notable change in consumer values. There has been a significant shift away from a focus on self-centered wellness, with a growing demand for scientifically proven solutions that actually deliver results. Additionally, there is a renewed interest in exploring the fundamental aspects of wellness, albeit in a reimagined manner.

These points provide an understanding of the economic impact and growth potential of health tourism globally, as well as specific country examples within the OIC region. The figures highlight the significance of health tourism as a thriving industry and its continued expansion despite temporary setbacks due to the COVID-19 pandemic.

2.2.1 Global Trends

The global health tourism industry has witnessed several trends that have shaped its development and potential. Understanding these trends is crucial for both OIC and non-OIC countries to capitalize on emerging opportunities. Some of the notable trends include:

i. Technological advancements: Advancements in technology have facilitated the growth of telemedicine and telehealth services. Patients can now consult with doctors remotely, access medical records online, and even receive certain treatments without the need for physical presence. The COVID-19 pandemic has accelerated the adoption of telemedicine and virtual consultations. WTO's "Trade in Services for Development Report" (2023) suggests the utilization of telemedicine holds immense potential to address challenges faced by developing countries, particularly in remote and underserved regions, by mitigating human resource and infrastructure limitations and enhancing accessibility to high-quality healthcare services. The effective implementation of telemedicine services depends significantly on the reliability and quality of internet connectivity and telecommunications infrastructure. Furthermore, telemedicine offers convenience, reduces travel costs, and improves accessibility to healthcare, making it an attractive option for health tourists.

ii. Demand for Elective and Specialized Treatments: As a rapidly expanding sector within the realm of health tourism, medical tourism enables individuals to seek medical treatment abroad. This branch of healthcare services encompasses a wide range of options, including elective procedures, necessary and specialized treatments, major and minor surgeries, and even routine medical examinations (Izadi et al., 2013). Patients are increasingly seeking elective procedures, such as cosmetic surgery, fertility treatments, and dental procedures, which are often not covered by insurance in their home countries. They often seek these treatments abroad due to cost savings, accessibility, and availability of highly skilled specialists. Additionally, there is a growing demand for specialized treatments, including cardiovascular surgeries, orthopaedic procedures, and cancer treatments.

iii. Personalized Healthcare Experiences: The enhancement of healthcare services within the tourism sector presents opportunities to not only benefit local residents but also to bolster the provision of personalized services tailored specifically for tourists (Yuan, 2017). Patients now expect personalized healthcare experiences tailored to their individual needs. This includes customized treatment plans, personalized care coordinators, and concierge services that cater to the unique requirements and preferences of health tourists. Personalization enhances patient satisfaction and outcomes, leading to positive word-of-mouth recommendations and repeat visits.

iv. Safety and Hygiene: With the Covid-19 pandemic, there has been a heightened focus on safety and hygiene protocols in healthcare facilities. Health tourists prioritize destinations and facilities that adhere to stringent safety measures, including enhanced sanitation, social distancing, and infection control practices. Such measures provide reassurance and give confidence in patients seeking medical treatments abroad (Jaiwilai, 2023).

v. Advanced Medicine: Advances in genomic medicine have opened up new possibilities for personalized healthcare. Genetic testing and precision medicine approaches are increasingly being incorporated into health tourism offerings. Patients seek countries and facilities that provide tailored treatments in order to optimize the effectiveness and outcomes of medical procedures. According to Tyagi and Lama (2016), among the treatments most sought after by medical tourists in India are alternative medicine, bone marrow transplants, cardiac bypass surgery, eye surgery, and orthopaedic surgery. India has gained recognition, especially in the fields of heart surgery, hip resurfacing, and other advanced medical practices. State-of-the-art diagnostic equipment is employed for all medical examinations and treatments, ensuring the utilization of the latest technological advancements.

Through rigorous quality assurance measures, dependable and timely test results of superior quality are consistently maintained.

vi. Wellness and Holistic Health: The demand for wellness tourism continues to grow, with travellers seeking holistic health experiences. Wellness retreats, spa treatments, yoga and meditation programs, and mindfulness practices are increasingly integrated into health tourism offerings. Health tourists are looking for destinations that provide a comprehensive approach to well-being, encompassing physical, mental, and emotional health. Increasing consumer interest in wellness is being fuelled by rising incomes and education levels, as well as growing concerns regarding chronic diseases and environmental issues (GWI, 2018).

vii. Integrative Medicine: The integration of conventional medicine with complementary and alternative therapies is gaining traction in health tourism. Integrative medicine combines evidence-based practices with holistic approaches, including naturopathy, acupuncture, herbal medicine, and mind-body therapies that is type of patient treatment, incorporating not only physical aspects but also spiritual, emotional, mental, and environmental element (Ganotta, 2018). Health tourists are seeking destinations that offer a range of treatment options, combining the best of conventional and alternative medicine. In particular, according to the World Health Organization (WHO, 2013), there was a notable increase of over 30% in visits to traditional and complementary medicine (T&CM) practitioners and practices in Australia between 1995 and 2005. In a study conducted in Saudi Arabia by Albedah et al. (2013), it was observed that individuals spent approximately \$ 560 per year on T&CM. Additionally, Nahin et al. (2009) found that in 2008, citizens of the United States collectively spent \$ 14.8 billion on personal natural product purchases.

viii. Focus on Mental Health and Wellness: Mental health and wellness have become significant considerations for health tourists. Destinations that offer mental health treatments, stress management programs, and mindfulness-based therapies are gaining popularity. The COVID-19 pandemic has further emphasized the need for mental health support, driving the demand for wellness experiences that address psychological well-being. According to a recent survey conducted in the UK, over 33 % of consumers now consider health and wellbeing to be an essential aspect of their lives, compared to 23 % prior to the pandemic. The study also revealed that nearly half of the respondents expressed a strong desire for breaks to alleviate the mental health stress caused by the pandemic. Out of those surveyed, 42 % indicated that their primary goal for post-COVID-19 holidays would be to rejuvenate and relax (Boutique Hotelier, 2020).

ix. Collaboration between healthcare providers and travel agencies: To tap into the potential of health tourism, collaborations have emerged between healthcare providers and travel agencies. According to Fundeanu (2015), the collaborative efforts between public authorities, the business community, academics, and healthcare and tourism specialists have facilitated the merging of theoretical knowledge and practical implementation. Figure 2 displays the various stakeholders in Malaysia that work for the development of health tourism as an example. This successful partnership among various stakeholders offers comprehensive packages that include medical treatments, travel arrangements, accommodation, and local experiences, providing a seamless experience for health tourists.

Figure 2: Malaysia Health Travel Council and Stakeholders



Source: Malaysia Healthcare Travel Council

2.2.2 Trends in OIC Countries

As OIC countries have been actively leveraging their unique healthcare offerings and cultural assets to attract health tourists, trends in health tourism have become a subject of great interest in this region. This emerging trend has led to the expansion of specialized healthcare services, such as Islamic (Halal) medicine, Muslim-friendly facilities and traditional healing practices, which cater to the specific needs and preferences of visitors seeking healthcare services within OIC member countries. The main health tourism trends in OIC countries are;

i. **Advanced Health Facilities:** OIC countries have been investing in state-of-the-art medical infrastructure and technology to attract international patients. This includes the establishment of modern hospitals, specialized clinics, and medical centres with advanced equipment and facilities. To ensure the service quality of medical procedures, the US based international healthcare accrediting institution, Joint Commission International (JCI) that is recognized as the global leader in healthcare accreditation and covers over 44 countries, provides accreditation for hospitals which are eligible for international patients.

Table 8: Number of JCI Accreditations in OIC

Country	Number of Accredited Organizatons
UAE	217
Saudi Arabia	112
Türkiye	35
Indonesia	23
Qatar	23
Malaysia	18
Egypt	12
Kazakhstan	9
Jordan	8
Oman	8
Pakistan	7
Palestine	6

Source: Joint Commission International

Recently, the number of JCI accredited healthcare organizations located in OIC countries have increased rapidly. Among them, UAE has the highest number of JCI accreditation with 217 (ranks 1st) organizations, while Saudi Arabia has 112, Türkiye hosts 35, Indonesia and Qatar have 23, and Malaysia is home to 18 accredited organizations (Joint Commission International, 2023) (see Table 8).

ii. **Affordable Healthcare:** Several OIC countries often provide more cost-effective healthcare options compared to developed countries. This affordability factor makes them attractive to patients from countries with high healthcare costs or those seeking affordable treatment without compromising quality. Jordan, Egypt, Azerbaijan, Türkiye and Malaysia are some of the most well-known affordable destinations. In particular, Jordan is a competitive destination for medical tourism, offering relatively low-cost treatment and highly qualified doctors (SESRIC, 2017). For instance, cataract surgery costs around \$1,200 in Jordan whereas \$3,500 in the US and \$2,700 in South Korea, kidney transplant costs about \$30,000 in Jordan, compared to \$100,000 in the United States. Medical procedures in Jordan are 50 to 60 % less costly than in Gulf countries. This is due to a number of factors, including the country's strong healthcare system, highly qualified doctors, and relatively low cost of living. As a result, Jordan is a popular destination for medical tourists from especially Gulf countries, who are looking for high-quality care at an affordable price (International Medical Travel Journal, 2018).

iii. **Growing Reputation in Specialized Treatments:** OIC countries have gained recognition for specialized medical treatments. For example, countries like UAE, Malaysia, and Indonesia have become popular destinations for cosmetic surgery, dental procedures, and fertility treatments. These countries have developed expertise in specific medical and healthcare fields, attracting patients seeking high-quality care at competitive prices. According to Government of Dubai Media Office (2023), Dubai's medical tourism industry experienced remarkable growth in 2022. The number of medical tourists visiting Dubai increased by 10%, from 612,000 in 2021 to 674,000 in 2022 and medical tourism revenues increased by 26% from AED760 million to AED992 million in the same period. Among these patients, the three most popular demanded medical specialties were dermatology, dentistry, and gynaecology. Medical tourists from Asia, Europe, Africa, GCC, and Arab countries also visited Dubai for treatment in the fields of orthopaedics, plastic surgery, ophthalmology, fertility treatments, hospitalisation, and recovery.

iv. **Dental Tourism:** OIC countries, such as UAE, Malaysia, and Türkiye have been witnessing a fast-paced growth in dental tourism. These countries offer high-quality dental treatments, including cosmetic dentistry, dental implants, and orthodontics, at internationally competitive prices. Dental tourists often seek affordable, high-quality dental care coupled with the opportunity to explore the cultural attractions of OIC destinations. For instance, Antalya, Türkiye's top tourism region with the most hotels, specializes in dental treatment and treats approximately 100 thousand patients annually. Treatment for a full set of "Türkiye teeth", perfect pearly whites start at \$ 3,935. And these prices are inclusive, typically covering four- or five-nights Bed & Breakfast in a decent hotel and all transfers as well as, often, a cheeky extra like facial filler or blemish removal at no extra cost. By comparison, a new set of teeth starts at least from \$ 14,756 in the UK (The Telegraph, 2023).

v. **Cosmetic Surgery:** OIC countries have seen a rise in medical tourists seeking cosmetic procedures such as hair transplant, rhinoplasty (nose surgery), liposuction, breast augmentation, and facelifts. These countries are known for their skilled surgeons, affordable prices, and well-equipped cosmetic surgery centres. For example, in Türkiye, some of the average cosmetic surgery prices as follows; rhinoplasty \$2,500, facelift \$3,200, eyelid surgery \$2,000 and Tommy tuck³ \$2,500. On the

³ A tummy tuck — also known as abdominoplasty — is a cosmetic surgical procedure to improve the shape and appearance of the abdomen.

other hand, patients need to pay \$7,000 for facelift in UK and \$8,000 in USA, and eyelid surgeries costs around \$4,000 in these countries (Medical Tourism Review, 2023).



Por Los Pelos

Türkiye's increasing fame in this field has also made its way into the cinema. The Spanish movie "Por Los Pelos" which was produced by Warner Bros and released in 2022, tells the story of three friends who travelled to Türkiye for a hair transplant.

Photo: The Movie Database

vi. Integration of Traditional Medicine: OIC countries often have a rich heritage of traditional medicine practices, such as Ayurveda, Unani, and Traditional Medicines. The OIC countries are capitalizing on their cultural and historical assets by integrating traditional medicine with modern healthcare offerings. Health tourists seeking alternative or complementary treatments are drawn to OIC countries for their diverse healing traditions.

Traditional medicine encompasses a body of knowledge and practices employed in the diagnosis, prevention, and treatment of diseases. Utilizing medicinal plants offers substantial benefits in managing various chronic conditions. For instance, in Nigeria, *Rauvolfia vomitoria* is traditionally used for hypertension and nervous disorders, while *Ocimum gratissimum* is employed for treating diarrheal ailments.

vii. Rehabilitation and Medical Wellness: OIC countries are focusing on rehabilitation and medical wellness tourism. These countries provide specialized rehabilitation programs, such as physical therapy, post-surgery recovery, and sports injury rehabilitation. Additionally, medical wellness programs targeting chronic conditions like obesity, diabetes, and cardiovascular health are gaining prominence.

viii. Wellness Tourism and Halal Spas: OIC countries are developing wellness tourism offerings that align with Halal principles. Halal spas, wellness retreats, and rejuvenation centers that provide gender facilities, Halal-certified services, and privacy options are gaining popularity. Muslim health tourists seeking relaxation, rejuvenation, and spiritual experiences are drawn to these destinations. Vichy Thermalia Spa Hotel Moulay Yacoub (Morocco), Pino Nature Hotel (Bosnia and Herzegovina), Grand Millennium Tabuk (Saudi Arabia), Marjan Island Resort & Spa (Oman), Royal Teos Thermal Resort Clinic & Spa (Türkiye), etc. are some of the spa centers offering Halal services to their customers (Halal booking, 2023).

Muslim-friendly spas are a growing trend in the spa industry, as they cater to the specific needs of Muslim consumers. These spas offer a variety of services that are in accordance with Islamic law, such as separate facilities for men and women, halal-certified products, and prayer rooms. There are a number of factors that have contributed to the growth of Muslim-friendly spas. One factor is the increasing number of Muslims worldwide, as well as the growing trend of Muslim-friendly tourism.

Another factor is the increasing awareness of the importance of halal products and services among Muslims (Jamaluddin, 2018).

ix. Islamic Medical Tourism: OIC countries are capitalizing on the growing demand for Islamic medical tourism, which involves providing healthcare services adhering to Islamic principles and values. Facilities offering Halal-certified treatments, gender facilities, and prayer facilities are attracting Muslim health tourists from around the world. Rahman and Zailani (2017) identified four characteristics that Muslim-friendly hospitals should have: 1) Separate wards for patients of different sexes and for different diseases; 2) Separate nurses and other ancillary staff for male and female patients; 3) Unrestricted water supply and sufficient facilities for baths, so that Muslims can perform wudu' before praying; 4) Prayer facilities and copies of the Holy Quran.

x. Halal-friendly tourism services: OIC countries recognize the importance of providing Halal-friendly services to Muslim health tourists. This includes adhering to Halal dietary requirements, offering prayer facilities, and ensuring gender accommodations and healthcare providers. The provision of Halal-friendly services enhances the appeal of OIC countries as preferred destinations for Muslim health tourists. Recent examples of Halal-friendly services (COMCEC, 2016); The establishment of halalbooking.com-style online reservation platforms, operators such as Etihad and Turkish Airlines providing halal food on their flights and strictly complying with the halal criteria, the implementation of the "Shariah-compliant hotel" concept in some hotels in a Far East country such as Indonesia, banning smoking in some hotels at Qatar as well as alcohol within the scope of the halal concept.

xi. Halal Gastronomy and Culinary Tourism: Tourists who are dissatisfied with the food service at a destination are more likely to be dissatisfied with their overall tourism experience. This dissatisfaction can lead to tourists not returning to the destination in the future (Kannan & Sugasri, 2019). OIC countries are promoting their diverse Halal gastronomy as part of health tourism experiences. Culinary tourism that highlights local Halal cuisine, food festivals, and cooking classes is attracting health tourists interested in exploring the unique flavours and culinary traditions of OIC countries.

xii. Collaboration and Partnerships: OIC countries are actively collaborating with international healthcare providers, travel agencies, and tourism boards to develop comprehensive health tourism packages. These partnerships aim to streamline the patient journey, combining medical treatments with travel arrangements, accommodation, and local experiences. Collaborations facilitate seamless experiences for health tourists and boost the overall competitiveness of OIC countries in the health tourism market. For instance, currently Dubai Health Authority is implementing seven Public-Private Partnerships (PPP), where the focus is on supporting the development of Dubai's health ecosystem in the short to mid-term (Dubai Health Authority, 2023). So far, within these projects a diagnosis center and Dubai Physiotherapy & Rehabilitation Center are developed and there are ongoing projects for cardiology center, long term care center and post-acute healthcare management facility. (Dubai Health Investment Guide, 2023)

By keeping up with these global and OIC-specific trends, OIC countries can position themselves as leading destinations for health tourism. They can attract a diverse range of health tourists by offering personalized, integrated, and culturally sensitive healthcare experiences that cater to the evolving needs and preferences of international patients. All these trends contribute to the global growth of

health tourism. The future is expected to bring further innovations and advancements in this field, making health tourism increasingly popular worldwide.

Concluding Remarks

The state of health tourism in OIC countries is promising, with substantial growth potential. The leading countries in this field have the necessary healthcare infrastructure, competitive pricing, and diverse tourism offerings to attract health tourists from around the world. The availability of high-quality medical facilities, combined with the cost advantage, positions these OIC countries as viable destinations for health tourism.

In order to fully unleash the tourism potential in OIC countries through health tourism, it is essential to stay updated on the recent trends shaping the global health tourism industry. The increasing demand for elective and specialized treatments, the rise in wellness and preventive healthcare, and the integration of technology in healthcare delivery are key trends to consider. Additionally, focusing on personalized healthcare experiences and fostering collaborations between healthcare providers and travel agencies can further enhance the attractiveness of OIC countries as health tourism destinations.

Some policy implications for OIC countries related with trends in health tourism:

- **Investing in healthcare and wellness infrastructure:** OIC countries should invest in building new hospitals, clinics and wellness centres, as well as upgrading existing facilities. This will help to meet the growing demand for high-quality medical care and attract health tourists from around the world.
- **Promoting wellness and wellness care:** OIC countries should promote wellness and wellness care through public awareness campaigns and specialized wellness programs and services. This will help to attract health tourists who are looking to improve their overall health and well-being.
- **Adopting technology:** OIC countries should embrace technology to improve the efficiency and quality of their healthcare delivery. This includes using telemedicine, electronic health records, and other digital tools. This will help to make it easier for patients to travel to OIC countries for medical care and receive high-quality treatment.
- **Focus on personalized healthcare experiences:** OIC countries should focus on providing personalized healthcare experiences to their patients. This means tailoring treatment plans to individual needs and preferences, and providing a high level of customer service. This will help to ensure that patients have a positive experience and are likely to return to OIC countries for future medical care.
- **Fostering collaboration between stakeholders:** OIC countries should foster collaboration between healthcare providers and travel agencies. This will help to make it easier for patients to travel to OIC countries for medical care. This includes developing joint marketing campaigns and providing travel assistance to patients.

By taking these steps, OIC countries can position themselves as leading destinations for health tourism in the global market.

Chapter 3

3. INVESTMENT ECOSYSTEM IN HEALTH TOURISM

In recent years, the health tourism industry has experienced remarkable growth, attracting individuals in search of top-notch medical services and rejuvenating experiences at affordable prices in foreign destinations. This thriving trend has given rise to a complex investment ecosystem, where various stakeholders, including healthcare providers, hospitality industries, technology firms and government bodies, converge to capitalize on the vast potential and opportunities offered by this transformative sector. However, as the industry continues to evolve, it faces a set of critical challenges that demand thoughtful consideration and strategic planning for boosting investments. This chapter explores the investment ecosystem of health tourism, identifying key issues and opportunities that shape its trajectory, while shedding light on the essential aspects that investors must navigate to ensure sustainable growth and long-term success.

3.1 Investment Ecosystem and Key Issues

The investment landscape in health tourism is a rapidly evolving and dynamic domain, driven by the convergence of healthcare and tourism industries. Investors are drawn to this burgeoning sector due to the rising demand for medical services and the desire for leisure and wellness experiences among patients. Nevertheless, this promising investment opportunity also presents a number of critical issues that necessitate attention of various stakeholders including policymakers and investors. These concerns encompass patient safety, quality of care, regulatory compliance, ethical considerations, cultural sensitivity, and the effective integration of healthcare with hospitality services. As the industry continues to undergo rapid changes, investors must grasp and address these pivotal matters to flourish and contribute positively to the transformative growth of health tourism.

3.1.1 Investment Ecosystem Stakeholders

The tourism sector faces transformative challenges and exciting prospects due to shifting consumer behaviours and expectations, the advantageous role of technology, and the pressing demand for enhanced sustainability. As a result, these dynamics prompt a re-evaluation of current business models and create promising opportunities for investors interested in this industry (WTO, 2021). The investment ecosystem in health tourism is comprised of multiple stakeholders, each playing a crucial role in shaping the industry's dynamics. These stakeholders include government & regulatory bodies, IPAs, medical facilities, insurance companies, tourism boards and etc. (Figure 3).

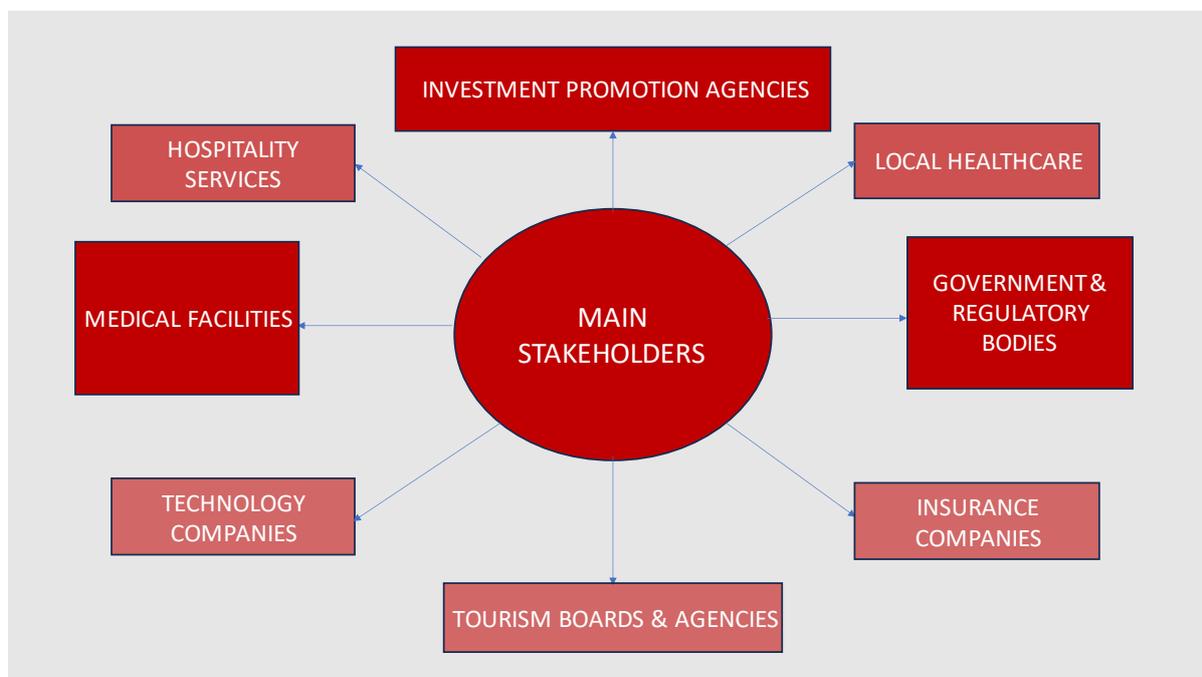
Foreign Direct Investment (FDI) in the health sector encompasses various forms, including FDI, venture capital, private equity, and non-equity arrangements, as well as different modes of market entry like mergers and acquisitions, greenfield projects, and joint ventures. These investments are directed towards two main segments (OECD, 2020):

- **Healthcare goods and technology:** This segment covers pharmaceuticals, medical technology (including biotechnology), and medical devices, along with their components. Key investment activities in this area include research and development, manufacturing, and distribution.
- **Healthcare infrastructure and services:** This segment involves the establishment and operation of private hospitals, clinics, medical offices, medical and diagnostic laboratories, and nursing

homes. Key investment activities related to this segment are focused on construction and professional services.

FDI in the health tourism encompasses a wide range of investment types and market entry approaches, targeting both healthcare and tourism infrastructure and services as well as healthcare goods and technology.

Figure 3: Main Stakeholders in Investment Ecosystem in Health Tourism



Source: Authors' Analysis

In order to attract new investments and retain the existing ones, investors need to interact directly or indirectly with many stakeholders that government and regulatory bodies including Investment Promotion Agencies (IPAs) that will be the main contact point. The governance of policymaking in health tourism requires the involvement of a number of Ministries in countries. For example, the Ministry of Health, Ministry of Tourism, Ministry of Finance, Ministry of Foreign Affairs and Ministry of Economy are some of the main actors in three countries namely Thailand, India and Türkiye in health tourism FDI projects (Hafizan, et al. 2018). The substantial contribution of these agencies in health tourism lies in their ability to establish favourable policies and regulations that attract foreign investment, prioritize patient safety, and endorse ethical conduct within the sector.

At the heart of health tourism lies the foundation of high-quality medical facilities and proficient healthcare providers. The presence of hospitals, clinics, and specialized medical centres offering cutting-edge treatments and procedures becomes a magnet for international patients seeking cost-effective solutions. This, in turn, positively influences investor perception, as they recognize the potential for lucrative opportunities within the thriving health tourism industry. Increasing health tourism services also attract investors to invest in facilities such as hospitals and clinics or to build them in new markets/regions. Tax exemptions and investment incentives to be applied on such investment projects will increase the interest of investors.

Collaboration between local tourism boards and agencies with medical facilities plays a pivotal role in positioning their countries as appealing health tourism destinations. Their joint efforts are centred

around showcasing the nation's distinct medical offerings, exceptional hospitality, and captivating tourism attractions. In particular, insurance companies play a crucial role by providing specialized health travel policies that cover potential medical complications during or after treatment, addressing the complexities that can arise when patients seek medical care in foreign countries.

Moreover, technology companies have significantly contributed to the growth of health tourism by introducing advancements in telemedicine and digital health solutions. These innovations enable remote consultations, pre- and post-treatment care, and ongoing patient management, making health tourism more accessible and convenient for both patients and healthcare providers. The presence of robust insurance coverage and the integration of technology in health tourism have both attracted the interest of investors.

Table 9: Health Tech Unicorns by Country

Country	Num. of Unicorns
Canada	2
China	21
Finland	1
France	3
India	3
Ireland	1
Singapore	2
South Korea	1
Sweden	1
Switzerland	2
United Kingdom	1
United States	98
Other	2
Total	138

Health tech companies are positively affected by the global investment environment. The great breakthrough in the field of technology and the increasing demand for health services have led to the emergence of many unicorns in the field of health tech. As of 1 February 2023, there are 138 Health Tech Unicorns⁴ around the world who are now collectively valued at more than \$ 320 Billion. United States stands first with the most health tech unicorns, 38, and followed by China with 21 unicorns. India, France, Canada, Switzerland and Ireland are among other countries having unicorns in this field. (Holon IQ, 2023) (Table 9).

Source: Holon IQ (2023)

In OIC countries, there are a number of health-tech startups. Arab News (2022) has shared a list of the top 10 most funded health-tech startups in the Middle East and North Africa region. Vezeeta, Egypt based tele health company offering appointment management software for doctors and healthcare providers, stands as the leader with a total funding of 73 million US Dollars. Atlibbi, UAE based digital platform, has more than 10.000 doctors in its platform which allows users to receive remote medical consultations and connect with professionals via calls and text chats, received \$44 million in a series B⁵ round and total of \$52.5 million funding in March 2022 (Table 10).

Efficient transportation options are crucial in health tourism, enabling patients to access healthcare facilities easily and reducing travel-related stress for medical appointments. Similarly, top-notch hospitality services, such as accommodation in reputable hotels or specialized medical tourism

⁴ In the tech industry, a unicorn is a privately held startup company with a valuation of over \$1 billion. The term was first coined by venture capitalist Aileen Lee in 2013, who chose the mythical animal to represent the rarity of such successful ventures.

⁵ Series B rounds are about taking businesses to the next level, past the development stage. Investors help startups get there by expanding market reach.

facilities, are essential to ensure patient satisfaction and support their well-being and recovery during the treatment period.

Table 10: Top 10 Most Funded Tech Startups in the MENA Region

Company Name	Headquarters	Total Funding	Service
Vezeeta	Egypt	\$73 million	Appointment management software for doctors and healthcare providers
Altibbi	UAE	\$52.5 million	Remote medical consultations
Bayzat	UAE	\$31 million	Health insurance platform and app
GluCare Health	UAE	\$20 million	Diabetic care
Selfologi	UAE	\$18 million	Online platform for aesthetic medical treatments
Okadoc	UAE	\$12 million	Appointment booking platform
Yodawy	Egypt	\$8.5 million	Virtual pharmacy marketplace
Aumet	Saudi Arabia & Jordan	\$8.5 million	B2B marketplace for healthcare providers to buy supplies
Webteb	Jordan	\$5.1 million	Online health news and medical information platform
Health at Hand	UAE	\$4 million	Virtual consultation app

Source: Arab News (2022)

In this respect, investments also play a vital role in improving transportation and hospitality aspects of health tourism. By injecting funds into the development and modernization of transportation infrastructure, connectivity and accessibility to medical centres can be significantly enhanced. Simultaneously, investing in the hospitality sector can lead to the establishment of high-quality medical tourism facilities catering to the needs of international patients, making their stay comfortable and supportive throughout their health tourism journey.

Regulating and prioritizing investment will boost health tourism's appeal to international patients, resulting in increased patient flow and revenue for medical facilities and the destination as a whole. Moreover, enhanced facilities and services will attract more investors to the health tourism sector, recognizing its potential for sustained growth and profitability. This cycle of investment and development will lead to a thriving health tourism industry benefiting patients, medical facilities, the hospitality sector, and the host country's economy alike.

3.1.2 Elements of the Health Tourism Investment Ecosystem

The health tourism investment ecosystem is a complex system that fosters the development and continuity of FDI in the industry. It encompasses various interconnected elements, each playing a crucial role in enhancing the appeal and prosperity of health tourism locations. In order to attract investment in health tourism, these elements must be sustained and managed to work harmoniously. The main ones are:

i. Healthcare Facilities: The backbone of health tourism lies in the availability of world-class healthcare facilities and services. Modern hospitals, specialized medical centers, and wellness retreats must continuously try to maintain state-of-the-art medical technology, employ highly skilled healthcare professionals, and adhere unwaveringly to strict international quality standards. The continuous improvement and expansion of medical offerings are vital to keep up with the evolving demands and expectations of health tourists.

Recently, one of the biggest investments has occurred in the health sector that Singapore-based sovereign wealth fund, Temasek Holdings, has completed a substantial acquisition, spending nearly \$2 billion to obtain a majority stake in Manipal Health Enterprises, India's second-largest hospital chain. With a stellar global reputation, Manipal Hospitals stands among India's leading healthcare providers, attending to over 4.5 million patients annually (Business Today, 2023).

ii. Government Incentives and Policies: Government authorities play a pivotal role in creating a conducive investment environment. Through forward-thinking policies, proactive regulatory measures, and targeted incentives, they can attract private investors and healthcare providers to invest in the development and enhancement of health tourism infrastructure. Collaborative efforts between public and private sectors foster innovation and sustainability in the industry.

Malaysia's approach to leveraging its growing prominence in medical tourism encompasses a multifaceted strategy. One notable facet is the government's utilization of double tax exemptions for hospitals that achieve Joint Commission International (JCI) accreditation. By intertwining tax incentives with healthcare sector expansion, the government actively fosters the growth of medical institutions. Additionally, Malaysia's visa policy emerges as a pivotal tool in attracting foreign patients. Under the 'Malaysia, My Second Home' initiative, foreign visitors are granted a five-year multiple entry visa, cultivating an environment conducive to health tourism. Notably, Malaysia has tailored a special 30-day visa for select countries, facilitating seamless entry for medical tourists. The Healthcare Traveler Programme further streamlines entry procedures, introducing the e-Visa (Medical) online platform. This platform empowers healthcare travellers with effortless and secure access to Malaysia's healthcare services, exemplifying the nation's commitment to enhancing the medical tourism experience (COMCEC, 2020).

Regional & free trade agreements are another means of attracting FDI. The main reason for this is the growth of the market with the agreements, the removal of barriers to trade and investments, and the increase in flexibility in policy measures (Welde & Nair, 2006).

iii. Tourism Infrastructure: A well-developed tourism infrastructure is essential to cater to the diverse needs of health tourists and their accompanying companions. Investing in the tourism sector of a host country heavily relies on the quality of infrastructure, given its significant cost implications for potential investors. Infrastructure encompasses various man-made establishments, such as domestic and international airports, roads, border checking points, as well as transportation facilities like power stations, dams, bridges, and more. These essential components collectively shape the attractiveness and feasibility of tourism investments in the region (FaladeObalade & Dubey, 2014).

iv. Key Partnerships: Investors acknowledge the crucial importance of strategic partnerships in the health tourism sector. These collaborations among healthcare providers, tourism agencies, and local authorities play a pivotal role in curating a smooth and all-encompassing patient experience. Such partnerships are designed to cater to diverse healthcare needs while simultaneously providing a holistic tourism adventure for the patients.

For instance, Health Management International (HMI Group) and Siemens Healthineers - have formed a groundbreaking 5-year strategic partnership aimed at advancing healthcare delivery in Southeast Asia. This unique collaboration involves HMI Group's commitment to invest over SGD 32 million in introducing innovative medical technologies and digitalization platforms. The partnership will also focus on enhancing clinical education and further developing Centers of Excellence in critical clinical

areas such as cancer, neuroscience, and cardiovascular diseases. This significant investment is an integral part of HMI Group's ongoing expansion endeavours across StarMed Specialist Centre in Singapore, as well as their tertiary hospitals in Malaysia -- Mahkota Medical Centre in Melaka and Regency Specialist Hospital in Johor (Siemens Healthineers, 2021).

v. Technological Advancements: Remaining at the forefront of medical technology is indispensable for attracting health tourists seeking advanced treatments and procedures. Investors must allocate resources towards acquiring state-of-the-art equipment and fostering research partnerships to offer innovative and exclusive medical services. To give an idea, availability of medical technologies such as telemedicine, model-based therapy, in-vitro diagnostics (IVD) and regenerative medicine are among the items Germany uses as a marketing tool in health tourism (COMCEC, 2020).

vi. Skilled Workforce and Language Proficiency: A well-trained, multilingual and culturally sensitive workforce is crucial to delivering personalized care and wellness services for health tourists. Healthcare professionals who possess a deep understanding of cultural nuances and are fluent in multiple languages can effectively communicate with international patients, thereby fostering a deeper sense of trust, empathy, and comfort throughout the health tourism journey. Investments in health sciences and medical education hold the potential to elevate the country's standing in the world of healthcare provision by leveraging its resources and knowledge.

vii. Effective Marketing and Promotion: The success of a health tourism destination heavily relies on effective marketing and promotional strategies. By strategically positioning themselves as premier health tourism hubs, destinations can attract a steady influx of health tourists. Collaborative marketing initiatives between healthcare and wellness providers as well as tourism boards and IPAs not only boost visibility but also highlight the unique strengths and advantages of the destination, leading to a competitive edge in the global health tourism market. In particular, the Tourism Authority of Thailand took a proactive step in endorsing health tourism by establishing 15 offices abroad to provide support in 1999. The government initiated promotional campaigns, with the 'Amazing Thailand' campaign being particularly noteworthy, showcasing the appeal of spas, hospitals, and herbal products as significant attractions (Alberti et al., 2014). Furthermore, countries like India, Thailand, Singapore, Malaysia, Costa Rica, Mexico, USA, Spain, Hungary, and Germany have achieved remarkable success in health tourism, largely due to the implementation of government support and incentives (Sancar, 2023).

3.1.3 The Role of Regulations and Legal Framework in Attracting FDI into Health Tourism

A robust and transparent regulatory and legal framework is instrumental in creating an investment-friendly environment for health tourism. According to (Stojanović, Stanišić, 2015), enhancing the legal framework to facilitate a seamless inflow of capital will promote direct investments in underdeveloped regions of the economy. The following factors are critical factors in the decision-making process of investors:

a) Regulatory Bodies and Accreditation Agencies: Regulatory bodies and accreditation agencies control the implementation of quality standards, ensuring patient safety and instilling confidence in medical tourists.

- i. Licensing:** Strict licensing processes are essential to verify the competence of healthcare facilities and guarantee adherence to international healthcare standards.

- ii. **Laws and Liability:** Clearly defined regulations concerning medical malpractice, liability, and patient rights safeguard the interests of medical tourists and healthcare providers alike. The development of health tourism is fostered by ensuring accountability for malpractice and safeguarding the rights of not only investors but also all stakeholders in the host country.

b) Professional Associations and Medical Societies: Professional associations and medical societies facilitate networking, knowledge exchange, and continuous improvement within the healthcare industry, benefitting both providers and investors. These institutions will also enable the development of an invisible monitoring mechanism of hospitals, clinics and other stakeholders.

In particular, Malaysian Tourism Centre and the Malaysian Association of Tour and Travel Agents operate under the Ministry of Tourism to actively participate in the legislative process governing the Malaysian medical tourism industry. Their role involves overseeing and coordinating various medical tourism-related activities. Similarly, in Türkiye, the Ministry of Health and the Turkish Medical Association collaborate to establish local standards and guidelines, ensuring the provision of high-quality healthcare services. These standards are followed by hospitals, healthcare facilities, and medical practitioners, complemented by the prestigious JCI accreditation. Meanwhile, in Azerbaijan, the Medical Support and Thermal Tourism Association collaborates with the Ministry of Health to develop action plans and supportive regulations for the medical tourism sector (COMCEC, 2020).

c) Medical Visas and Travel Regulations: Streamlined visa processes and travel regulations ensure hassle-free entry and stay for medical tourists seeking treatment abroad.

d) Intellectual Property Protection: Ensuring robust intellectual property protection encourages medical innovation and the advancement of medical technologies.

3.1.4 Challenges and Issues in Health Tourism Investments

While health tourism presents lucrative investment opportunities, several challenges and issues warrant attention to ensure sustained growth and ethical practices:

a) Quality Assurance and Standardization: The quality and safety of medical services abroad are paramount concerns for health tourists. Therefore, for investors, it is vital to ensure that the healthcare facilities they invest in strictly adhere to internationally recognized quality and safety standards. Obtaining accreditation from reputable organizations plays a crucial role in gaining the trust of potential patients and upholding a positive reputation within the industry.

Within the realm of international medical tourism, a range of certifications, both from private enterprises and professional bodies such as Joint Commission International, Accreditation Canada International, Trent, Medical Travel Quality Alliance, and ISO, play a pivotal role. These certifications collectively serve as defining cornerstones, offering comprehensive guidelines for both potential patients and facilitators (UNWTO, 2018).

b) Regulations & Laws: For investors in health tourism, dealing with the diverse regulatory and legal frameworks in different countries can present significant challenges. The regulatory landscape for health tourism varies from one country to another, making it difficult for investors to determine the most suitable investment destinations. To mitigate potential legal risks and ensure compliance, it is crucial for investors to have a comprehensive understanding of local healthcare regulations, licensing prerequisites, and liability considerations.

Moreover, it is essential that the legal rules in the country provide adequate protection for the rights of investors. These rules should be designed in a way that offers long-term stability and does not lead to unforeseen changes or adverse consequences for investors in the future.

c) Ethical Considerations: Health tourism can raise ethical dilemmas, such as "medical tourism exploitation" in some cases. Investors should be vigilant in selecting partners that prioritize patient welfare over financial gain and ensure transparent pricing and informed consent procedures.

d) Infrastructure Development and Capacity Building: Recognizing and resolving infrastructure deficiencies, particularly in underdeveloped areas, is crucial to cater to the needs of medical tourists. The absence of efficient infrastructure, including hotels and lodging facilities, transportation and communication networks, and tourism information services, poses a significant obstacle in fostering a sustainable tourism industry. This hinders the ability to deliver tourists with the expected international standards of high-quality tourism facilities and services. Instances of malpractices or negative experiences arising from infrastructure-related issues can significantly tarnish the tourism image of a country (SESRIC, 2020).

e) Healthcare Costs and Affordability: Balancing healthcare costs and quality to attract budget-conscious medical tourists while maintaining excellent patient outcomes is crucial. Healthcare expenses can be a deterrent for some health tourists, so investors must ensure that their services are affordable for the target market.

For example, Türkiye's advancement in health tourism is further bolstered by substantial incentives extended by the Ministry of Trade. A tangible illustration of this lies in the establishment of preliminary diagnosis centers abroad, where, subject to meeting specified conditions, the Ministry extends support by covering 60% of facility rents for four years. Advertisement and marketing expenses are also covered in the subsidy scheme that an additional 60% nonrefundable grant for these expenses is made available for the subsequent four years (Bağcı, 2022).

f) Reputation Management: The success of health tourism investment heavily relies on positive word-of-mouth and online reviews. Prioritizing patient satisfaction and investing in initiatives to build a trustworthy and esteemed brand within the health tourism sector are essential.

g) Travel and Accessibility: Investors should consider the accessibility and ease of travel to the destination country. Efficient transportation connections and streamlined visa procedures contribute to attracting more health tourists, enhancing the overall experience and appeal of the destination.

For instance, Türkiye promotes its accessibility by marketing that patients from over 48 countries can conveniently access Türkiye within a short 4-hour flight, while direct flights to numerous other countries further enhance its appeal as a favourable destination. Turkish Airlines, renowned for its extensive global coverage, provides flights to 299 cities across 120 countries from Türkiye (COMCEC, 2020).

3.2 Recent Developments in the World and OIC Countries

In recent years, there has been a noticeable increase in Foreign Direct Investment (FDI) in the health tourism sector. Several factors are driving this growth. One key factor is the aging population in many developed countries, leading to an increased demand for healthcare services (COMCEC, 2020). Additionally, the rising cost of healthcare in developed nations has made it more affordable for

patients to seek treatment abroad. Furthermore, the availability of high-quality healthcare services in developing countries has attracted foreign patients (WTO, 2019).

According to the Business Research Company (2023), the health tourism market was valued at \$ 35.8 billion in 2022 and is projected to reach \$ 54.4 billion by 2026. Developing countries, such as India, Thailand, Malaysia and UAE have become major recipients of FDI in the health tourism sector. These countries offer various advantages to foreign investors, including lower labour costs, less strict regulatory requirements, and a pool of skilled medical professionals.

Recent FDI and investments in health tourism have primarily focused on establishing new hospitals and clinics designed to cater specifically to foreign patients in developing countries. Additionally, existing medical tourism providers are expanding into new markets and technological advancements such as telemedicine and medical transcription services, are being leveraged to facilitate health tourism (Zimmy, 2011). The growth of FDI in this sector is expected to continue as more patients seek high-quality and affordable healthcare abroad.

A recent trend in health tourism is the development of medical tourism clusters—geographic areas specifically aimed at attracting foreign patients. These clusters typically include hospitals, clinics, hotels, and other amenities, making it convenient for patients to travel and receive treatment. Successful examples of such clusters include Kvarner Health Tourism Cluster (Croatia), Spaincares - Spanish Cluster of Health Tourism, Baltic Health Tourism Cluster (Estonia, Latvia and Lithuania), Alpine Wellness (Austria) and Nordic Wellbeing (Nordic Countries) (UNWTO, 2018).

Apart from traditional medical tourism, there is also a rising interest in wellness tourism, where people travel to destinations offering various health and wellness services. These services can range from spa treatments to activities promoting physical and mental well-being, such as yoga and meditation. Popular wellness tourism destinations include Indonesia, Morocco, Germany, and the Baltic Countries.

It is not possible to provide a proper analysis on health tourism FDI due to the lack of comparable data. Yet, trends in global tourism FDI could provide some insights.

Table 11: Global Tourism FDI 2017-2021

Year	Investment (\$bn)
2017	22.1
2018	70.8
2019	59.3
2020	16.4
2021	9.5
Total	178.2

Source: fDi Markets

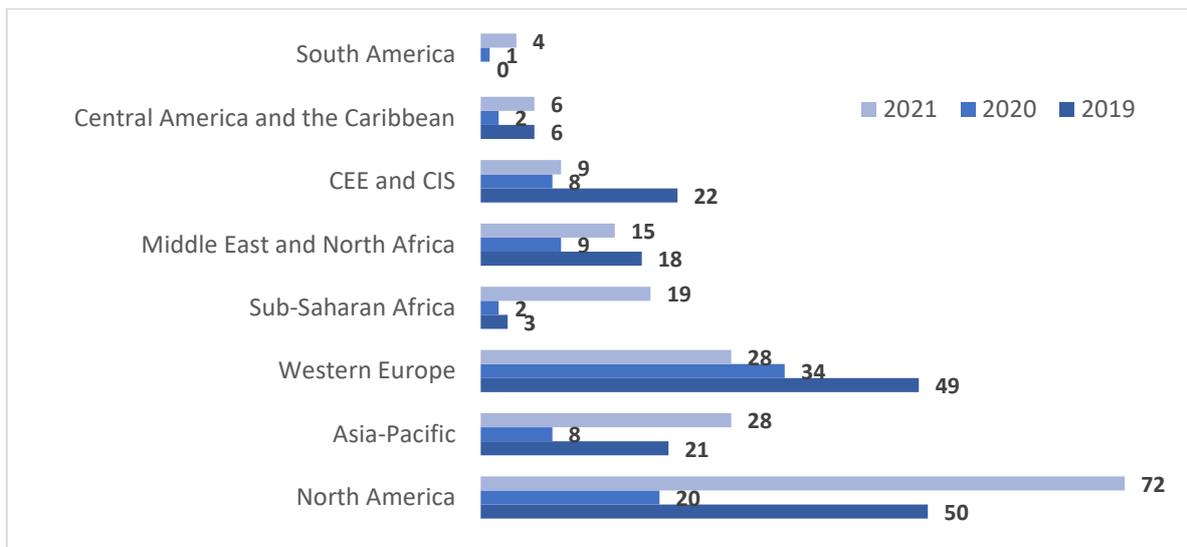
Between 2017 and 2021, foreign investors realized a total of 2,232 foreign direct investment (FDI) projects in the tourism sector, as reported by fDi Markets. These projects involved a collective capital investment of \$178.2 billion and led to the creation of more than 381,000 jobs (Table 11). However, despite the resurgence of international travel in 2021, FDI in the tourism sector remained subdued due to the lasting impacts of the coronavirus pandemic and economic instability. In 2021, the number of FDI projects in the tourism cluster decreased by an additional 8%, from 271 investments in 2020 to 250 in 2021 (UNWTO, 2022). In terms the total number of tourism FDI projects, the UAE placed among top-ten countries in the world with a total number 87 projects over the period 2017-2021. During

the period from 2017 to 2021, Indonesia also attracted 30 tourism investments, which accounted for 5.7% of all FDI projects in Asia. On the other hand, Türkiye emerged as the leading destination market for tourism investments in emerging Europe, securing 45 projects. These investments amounted to a total capital investment of \$332.5 million and contributed to the creation of 2,200 new jobs. In 2021, Saudi Arabia received \$518 million in tourism capital investment, ranking second in the MENA region in terms of capital investment.

Notably, the UAE was the primary source country for tourism investments between 2017 and 2021, contributing to 63 outward FDI tourism projects, representing 55% of the market share in the region. Additionally, the UAE led in outward capital investment with \$3.9 billion and played a significant role in creating more than 9,000 tourism jobs. Following closely behind the UAE in outward tourism capital investment and job creation was Qatar (UNWTO, 2022).

Based on the Investment Monitor’s (2023) report on GlobalData's FDI Projects Data, the healthcare sector witnessed significant growth in FDI projects during 2021. The number of FDI projects in healthcare rose to 181, compared to 84 in the previous year, and it surpassed the 169 recorded in 2019, indicating a rebound in the industry post the Covid-19 pandemic. Among these 181 FDI projects, 90% were entirely new ventures, while the remaining 10% represented expansions of existing healthcare facilities.

Graph 3: Breakdown of FDI Projects in Healthcare by Destination Region



Source: GlobalData's FDI Projects Database. Note: CEE and CIS stand for Central and Eastern Europe and the Commonwealth of Independent States.

North America emerged as the leading region in attracting FDI projects in healthcare during 2021, with 40% of all global projects being announced or established there. The region saw a notable increase, attracting 72 projects in 2021, up from just 20 in 2020. Additionally, Asia-Pacific and western Europe also remained popular destinations for healthcare FDI. Asia-Pacific experienced growth, attracting 28 projects in 2021 compared to 20 in the previous year, whereas western Europe saw a slight decline, receiving 28 projects in 2021, down from 34 in 2020. (Graph 3).

The United States retained its position as the top destination country for healthcare FDI in 2021. It attracted 71 inbound healthcare projects, more than triple the number from 2019. For instance, Eugenix Hair Transplant Sciences, a hair restoration clinic based in India, announced plans to open a

new clinic in the US during 2021. India and Germany were also significant players in attracting healthcare FDI projects in 2021. Among the OIC countries, the UAE ranked fourth, and Egypt ranked ninth in the list of top 10 FDI destinations. The UAE received seven projects in 2021, which was lower than its 2019 figures, while Egypt attracted three projects (Table 12).

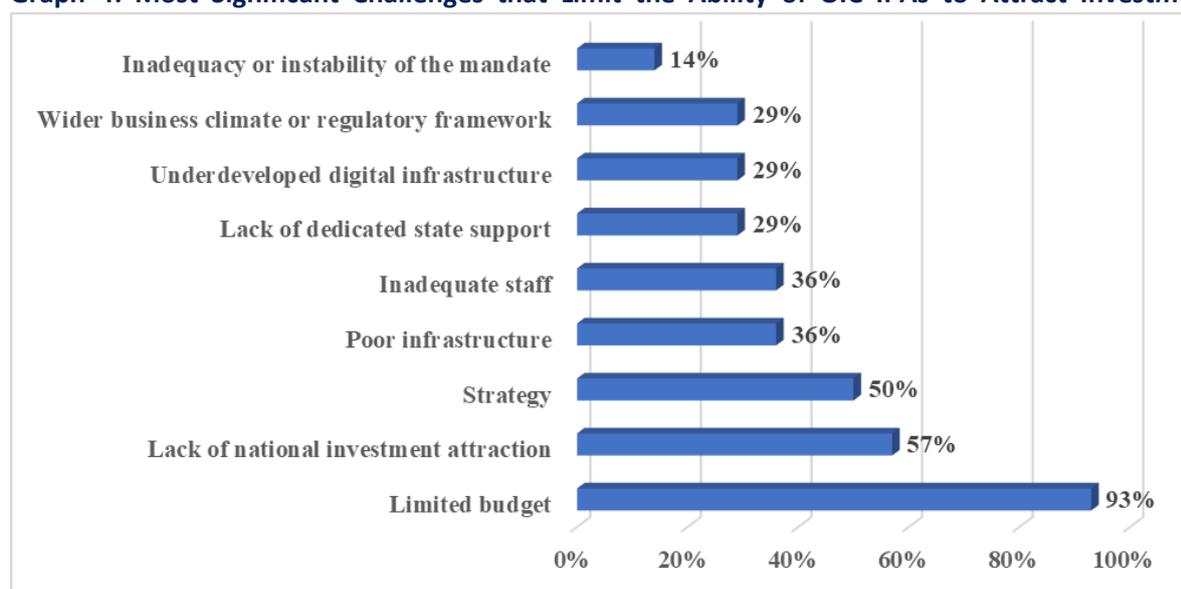
Table 12: Breakdown of FDI Projects in Healthcare by Destination Country

Country	2019	2020	2021
US	49	20	71
India	7	0	14
Germany	4	12	13
UAE*	13	5	7
UK	20	6	5
Australia	5	1	4
Spain	10	1	4
China	5	1	3
Egypt*	1	2	3
Kenya	1	0	3

Source: GlobalData's FDI Projects Database. Note:* OIC Member Countries

On the other hand, although some of the OIC countries are very good at in attracting FDI such as UAE, Malaysia, Qatar, unfortunately, still many OIC countries are struggling to attract foreign investors. According to the ICDT survey on challenges in investment, several recurring themes emerge. A constrained budget is the most frequently cited challenge, accounting for 93% of responses. Image-related issues rank second at 57%, encompassing concerns about political stability, security, lifestyle, and more within their respective nations.

Graph 4: Most Significant Challenges that Limit the Ability of OIC IPAs to Attract Investment



Source: ICDT survey of Investment Promotion Agencies (2022)

These concerns extend to the potential propagation of a negative country image by investors within their professional networks. In light of these circumstances, policymakers could pivot their efforts toward refining the overall business climate and the nation's image, rather than allocating resources to expensive promotional campaigns. Lack of long-term strategy, poor infrastructure and inadequate staff are the other main challenges in attracting investment in OIC countries (Graph 4) (ICDT, 2022).

Moreover, the digitalization status pertaining to the investment and establishment processes of foreign affiliates reflects a dissatisfactory state. The findings of a survey conducted by ICDT reveal a conspicuous absence of digitalization, emerging as a prominent obstacle within the investment landscape. Notably, eight OIC IPAs have conveyed that a mere fraction of procedures can be accessed online within their respective nations. This digital gap is starkly evident in Chad, where the entirety of the process mandates physical engagement. Notably, among the surveyed IPAs, ANPI-Gabon stands as the sole entity reporting a comprehensive digitalization of the business establishment and investment process. The survey underscores that Nigeria, Pakistan, Somalia, and Sudan exhibit substantial online availability of requisite procedures and prerequisites, as per respondents' accounts. (ICDT, 2022).

3.3 Successful Examples in Attracting FDI in Health Tourism

Foreign direct investment (FDI) is a significant driver of economic growth and development in many countries. In the health tourism sector, FDI can create jobs, and improve the quality of healthcare services as well as stimulate the growth.

There are many examples of successful FDI initiatives in OIC Countries. Some selected examples are as presented below:

Saudi Arabia

In alignment with Vision 2030, Saudi Arabia has taken measures to boost Foreign Direct Investment (FDI) inflows in recent years. To achieve this, the country introduced the National Investment Strategy (NIS) in October 2021. The NIS sets a ambitious goal of attracting \$103.5 billion in FDI annually by 2030. To attract investments, the strategy focuses on key sectors such as manufacturing, renewable energy, transport and logistics, tourism, digital infrastructure, and healthcare (Arabnews, 2021). Under Vision 2030, the Saudi Arabian Government plans to invest over \$65 billion to develop the country's healthcare infrastructure. In addition, it aims to increase private sector contribution from 40 % to 65 % by 2030, targeting the privatization of 290 hospitals and 2,300 primary health centers (The International Trade Administration – Saudi Arabia Commercial Guide, 2022).

The Tourism Development Fund of Saudi Arabia has entered into a partnership agreement with London-based Ennismore and Al-Rajhi Capital to create a SR1.5 billion (\$400 million) investment fund focusing on the hospitality sector. The primary goal of this collaboration is to promote lifestyle hotels and enhance tourist destinations across the Kingdom of Saudi Arabia. Under this agreement, the Tourism Development Fund will provide investments into the newly established fund, while Ennismore will take the lead in developing and operating projects under its portfolio of lifestyle brands. Al-Rajhi Capital will assume the role of managing the investment fund and attracting additional investments for the venture. The collective efforts of these entities aim to further boost the growth and attractiveness of the Saudi Arabian hospitality industry.

Jordan based investment company, Arcapita invested Saudi NuYu, Leading Women's Fitness Chain in Saudi Arabia, to expand its network of boutique gyms from the existing seven to over 30 locations throughout the Kingdom, with an investment totalling SAR 250 million (\$67 million). This expansion is expected to generate hundreds of job opportunities and, importantly, offer women access to fitness facilities in areas that are currently underserved. The investment comes at an opportune time as the General Sports Authority recently made a ground-breaking decision to grant licenses for female boutique gyms (PRNewswire, 2018).

Health-tech company Aumet, based in Saudi Arabia, has successfully secured \$7 million in a pre-Series A funding round. The investment comes from various entities, including AAIC, a healthcare-focused venture capital firm from Tokyo, Swiss private equity firm AIJ Holdings, the Hamad Ali Sagri family office, Tijah Holdings, Cigalah Group, and existing investor Shorooq Partners. Aumet operates an innovative artificial intelligence (AI)-driven business-to-business (B2B) healthcare platform that delivers tailored solutions to healthcare providers (Wamda, 2023).

United Arab Emirates

The United Arab Emirates (UAE) healthcare sector attracted foreign direct investments amounting to \$ 784 million between August 2016 and August 2021 (InvestEmirates, 2023). In the UAE there are 157 hospitals and 5369 health centres. The country is divided into 53 public hospitals and 104 private hospitals (UAE Statistical Annual Report, 2020).



Image: Sheikh Shakhbout Medical City. Source: ssmc.ae

Mayo Clinic, US based company, invested \$50 million in a 741-bed hospital opening in the United Arab Emirates. The Sheikh Shakhbout Medical City in Abu Dhabi is a joint venture between Mayo Clinic and the Abu Dhabi Health Services Co. This is the first Mayo Clinic hospital project outside of the U.S. (Post Bulletin, 2020).

Cleveland Clinic Abu Dhabi is a multi-specialty hospital located in Abu Dhabi, United Arab Emirates. The 364-bed luxury hospital is staffed by over 1,500 physicians and nurses. Cleveland Clinic Abu Dhabi is a joint venture between Cleveland Clinic Foundation-USA and Mubadala Development Company-UAE (Cleveland Clinic Abu Dhabi, 2023).

Alma Health, a digital healthcare company based in the UAE, has successfully raised \$10 million in a Series A funding round, which was co-led by Knuru Capital and Hambro Perks Oryx Fund. The funding round saw the participation of other investors, including e& Capital, S3 Ventures, Pinnacle Capital, and Khwarizmi Ventures, with KCP Capital acting as the company's financial advisor (Crunchbase, 2023).

Asan Medical Center, in collaboration with Scope Investments and the support of the Dubai Health Authority, aims to establish the first integrated gastroenterology hospital in Dubai, United Arab Emirates. This hospital will have a capacity of 65 beds and will serve as a valuable addition to the

specialized healthcare services available to both local and international patients. This initiative represents a significant step in advancing specialized healthcare offerings in the Emirate of Dubai and is expected to meet the growing demand for gastroenterological services within the region (Emirates 24/7, 2023).

Jordan

In 2018, there were 116 private, semi-public healthcare institutions and public hospitals in Jordan that provide 14,741 beds (COMCEC, 2020). The public sector -Royal Medical Services, Jordan University Hospitals, King Abdullah Hospital are included- accounts for the majority (%60) of these hospital beds, the rest is provided by private hospitals. The number of private hospitals in the country is increasing regularly due to private investments and public private partnerships. Jordan has adopted liberal economic policies and the free market economy since 1998, so private investment in healthcare has become prevalent. Since then, privately owned hospitals have been actively promoting Jordan as the ultimate medical tourism destination in the region (Al-Maaitah, 2016).

With the effect of wellness tourism in Jordan, the Dead Sea region attracts thousands of tourists every year. For this reason, international hotel chains such as Hilton, Mövenpick, Kempinski and Ramada have also moved their activities to this region and offer wellness services as well as tourism (Booking Holdings Inc., 2023).



*Image: Hilton Hotel Resort & Spa Dead Sea
Source: TripAdvisor*

Malaysia

The government of Malaysia encourages private sector investment by contracting several services including hospital services and drug distribution and continues to corporatize some institutions (e.g. National Heart Institute). The participation of private sector in terms of the number of hospitals and capacity regarding the number of beds display a rising trend as opposed to public sector (COMCEC, 2020). As of January 2019, nearly 69 % of clinics (7571 clinics) and 55 % of hospitals (200 hospitals with 14,799 beds) are privately owned while there are 144 public hospitals and nine specialist public medical institutions (Ahmad, 2019).

IHH Healthcare Berhad, an international private healthcare group focused on upmarket health services and is Asia's largest private healthcare group, which is owned by Malaysian investment firm Khazanah, acquired Parkway Holdings in Singapore and Acibadem Hospitals (60% for \$ 1.25 billion).

(Khazanah Nasional, 2008; Milliyet 2011) Parkway Holdings operates a comprehensive healthcare service network in Singapore, Malaysia, China, Brunei, and India. With an integrated approach, the company runs approximately 20 hospitals that offer a wide range of medical services, including emergency and acute care, general medicine, diagnostics, primary and dental care, as well as rehabilitative services.

Egypt

The Egyptian Aviation Company and the Arab Investors Union have entered into a strategic agreement aimed at fostering therapeutic tourism in Egypt while fostering cooperation between Arab and African nations. This collaboration is expected to bolster religious tourism, enhance air traffic, open up new markets for air transport, and attract increased investments for the country (The North African Post, 2023).

DM Development Company has entered into a memorandum of understanding (MoU) with the German Group Apleona to create the inaugural destination for recreational medical tourism in Egypt and the Middle East. The development is set to be located in Ain Sokhna "Al Galala" and will entail investments amounting to LE 300 million (approximately \$ 10 million). The primary objective of this collaboration is to cater to a new segment in the tourism and leisure industry by offering specialized services at The Grove Resort (Ain Sokhna-Al Galala) and establishing a pioneering health destination with an associated private hotel. The purpose of this health destination is to fulfil the health tourism requirements of the resort's visitors (Egypt Today, 2022).

Concluding Remarks

The investment ecosystem in health tourism offers promising prospects for OIC countries to enhance their healthcare infrastructure, attract foreign direct investment, and capitalize on the burgeoning demand for medical and wellness services. The analysis of the investment ecosystem and key issues has underscored the significance of well-thought-out policy decisions in fostering an enabling environment for investments in the health tourism sector.

Recent global developments and those specific to OIC countries have evidenced a growing interest in health tourism, primarily driven by escalating medical costs in developed nations, advancements in healthcare technology, and an increasing emphasis on wellness and preventive care. Given their diverse cultural heritage, abundant natural resources, and well-established medical expertise, OIC countries are strategically positioned to capitalize on the thriving health tourism market.

The policy implications for OIC countries entail the formulation and effective implementation of targeted strategies to attract and facilitate foreign investment in health tourism. Central areas of focus should encompass the enhancement of healthcare infrastructure, streamlining regulatory and licensing processes, promoting international accreditation of medical facilities, investment in research and development, and augmenting marketing efforts to showcase the distinctive offerings of each country.

Moreover, fostering public-private partnerships (PPPs) emerges as a pivotal means of strengthening the investment ecosystem in health tourism. Collaborative efforts between governments, healthcare institutions, and private investors can lead to the establishment of cutting-edge medical facilities, innovative treatments, and specialized services catering to the specific needs of international patients.

OIC countries may consider the following policy options to bolster their investment ecosystem in health tourism:

- i. Streamlining Regulatory Processes:** Streamlining licensing and accreditation procedures for medical facilities can entice more foreign investors to establish healthcare centres in OIC countries. Establishing a transparent and efficient regulatory environment will bolster confidence in investors and attract reputable healthcare providers.
- ii. Investing in Healthcare Infrastructure:** Allocating funds for the development and modernization of healthcare infrastructure can substantially enhance the quality and accessibility of medical services. Consideration should be given to the establishment of specialized medical zones catering exclusively to health tourism.
- iii. International Accreditation and Quality Standards:** Encouraging healthcare facilities to seek international accreditation and adhere to globally recognized quality standards can bolster the reputation and reliability of OIC countries as esteemed health tourism destinations.
- iv. Incentives for Foreign Investors:** Offering appealing financial incentives and tax benefits to foreign investors seeking to invest in the health tourism sector can serve as a powerful incentive to attract higher levels of foreign direct investment. Such incentives may encompass reduced corporate tax rates, customs exemptions, or financial support for infrastructure development.
- v. Public-Private Partnerships (PPPs):** Actively promoting and facilitating PPPs between the government and private healthcare providers can lead to the establishment of state-of-the-art medical facilities and services. These collaborations leverage the expertise of the private sector while ensuring affordability and accessibility for local and international patients.
- vi. Health Tourism Marketing Campaigns:** Investing in targeted marketing campaigns that showcase the unique medical offerings, cultural experiences, and tourist attractions of OIC countries can create a robust brand presence in the health tourism market, attracting a broader international clientele.
- vii. Research and Development Grants:** Providing grants and incentives for research and development in healthcare and medical technology can encourage innovation and attract cutting-edge medical treatments and procedures to OIC countries.
- viii. Medical Training and Education:** Enhancing medical training and education programs ensures a skilled workforce that meets the demands of international patients. This may include specialized training for medical professionals in areas relevant to health tourism.
- ix. Visa Facilitation:** Implementing streamlined visa procedures for medical tourists can remove barriers and simplify travel, making OIC countries more appealing destinations for international patients seeking medical treatment.

Chapter 4

4. DIGITALIZATION IN HEALTH TOURISM

Digitalization has sparked a profound transformation in the health tourism industry, ushering in a new era of boundless opportunities. In this transformative phase consumers are increasingly seeking active involvement through digital mechanisms. These digital tools in the healthcare domain are driven by several key objectives, including augmenting communication and interaction between healthcare providers and patients, facilitating seamless access to clear and comprehensive information, empowering patients to make well-informed decisions, and ensuring the provision of secure treatments. Moreover, these technological advancements also play a crucial role in supporting the rehabilitation process once the patient has concluded their medical intervention and returned home (Goel, 2019).

Against this background, this chapter explores the role of digitalization in the advancement of health tourism, starting with an overview of new technologies and their integration. Then, it looks at the role of digitalization in the development of the health tourism experience, followed by examples of good practices in digital health tourism. The chapter will conclude with remarks on the policy implications of digitalization for OIC countries.

4.1 New Technologies and Digitalization

Technologies such as telemedicine, virtual reality, and artificial intelligence have emerged as key drivers, revolutionizing the efficiency, effectiveness, and accessibility of health tourism services.

Table 13: Digital Technologies in the Healthcare Sector

Technology	Description	Features	Platforms
Electronic Health Records	Digital systems that store and manage patient health information	Secure sharing of information between healthcare providers	Modernizing medicine, Greenway health, GE centricity, and NextGen healthcare
Medical imaging	Digital methods for visualizing and analyzing medical images	Integration with Electronic Health Records (EHRs) and remote monitoring	Cloud-based platforms, Mobile devices and Wearables
Artificial intelligence	Machine learning to enhance health outcomes	Predictive analysis and early detection of potential health issues	Health applications and portals for patients and healthcare providers
Blockchain	Technology for secure health data management through distributed ledgers	Eliminates the need for a central authority to manage the data	Ethereum, hyperledger, and corda
Telemedicine	Remote medical treatment through technology	Tracking essential vital signs, blood pressure, heart rate, and oxygen levels	Web-based portals
mHealth	Mobile technology used for health monitoring, diagnosis, and treatment	Remote monitoring and data management and analysis	iOS, Android, and Web-based
Wearable Devices	Health-tracking devices worn on the body	Continuous monitoring of vital signs as well as health and fitness tracking	Apple WatchOS, Google Wear OS, and FitbitOS
Robotic process automation	Automation of routine tasks in healthcare	Real-time data processing and analysis	UiPath, Automation Anywhere, Blue Prism, WorkFusion
Federated learning	Preserving data privacy and reducing communication costs	The model can be updated in real-time, as new data is collected from the devices	TensorFlow Federated (TFF), PySyft

Source: Paul, M. Et al. (2023)

The utilization of these technologies holds significant pertinence and efficacy in the realm of health tourism, specifically in enhancing the pre- and post-operative care processes, encompassing both medical and customer service dimensions (Medical Tourism Magazine, 2020). Remote tele-

consultations enable anaesthesiologists and surgeons to assess the healing progress and wound recovery of health tourists, even when they are situated in their home country. Additionally, mobile healthcare fosters advancements in correlated digitalized products, such as wearables, digital sensors, and biotelemetry (Wong & Hazley, 2020). Table 13 presents selected essential digital technologies in the healthcare sector from electronic records to mhealth applications.

4.1.1 Definition of Digitalization

Digitalization refers to leveraging digital technologies to transform a business model and create fresh avenues for generating revenue and value. It involves the transition towards operating as a digital business (Gartner, 2023). In recent decade, digitalization has become a fundamental strategy for organizations seeking to stay competitive and relevant. By digitalization, digital technologies are integrated into various aspects of a business or industry to enhance efficiency, accessibility, and user experience. Businesses that are embracing digitalization, can unlock unprecedented opportunities for growth, innovation and competitive advantage (OECD, 2020).

In the context of health tourism, it involves employing digital technologies to streamline healthcare services, improve communication between healthcare providers and patients, and devise innovative solutions to patient outcomes. Moreover, digitalization in health tourism enables seamless communication, remote access to medical expertise, enhanced patient care through real-time information, and personalized services, benefiting both patients and providers by improving outcomes, efficiency, and global visibility. These developments have resulted in a more convenient, personalized, and cost-effective experience for both service providers and patients, creating unprecedented prospects for growth. Notably, in OIC countries the digital revolution could offer a strategic pathway to boost health tourism and enable attracting visitors from all over the world.

4.1.2 New Technologies and Digitalization in Health Tourism

The rapid digitalization and technological innovations have facilitated the exchange of information among various stakeholders, including healthcare providers and patients, leading to improved care coordination and optimized treatment outcomes. Moreover, they have played a pivotal role in fostering seamless communication between patients and healthcare providers, thereby enriching the overall patient experience and bolstering accessibility to healthcare services. Furthermore, the integration of digital technologies has empowered patients by granting them access to educational resources pertaining to their health conditions and available treatment options, thus facilitating well-informed decision-making. Notably, these advancements have also streamlined appointment booking and payment processes, ultimately enhancing the overall operational efficiency of the health tourism sector. These technologies and digitalization tools also play a vital role in enhancing the health tourism experience, providing convenience, accessibility, and personalized care for health tourists seeking medical treatments or wellness-focused journeys.

The key technologies that could boost health tourism can be listed as follows:

- i. **Telemedicine:** Telemedicine plays a crucial role in virtual medical tourism platforms by facilitating remote consultations between patients and healthcare providers through communication technology. Secure video conferencing and real-time communication enable health tourists to interact with doctors and specialists in their destination country before physically traveling for treatment. This digitalization of medical consultations empowers patients to make informed decisions, gather

essential information, and even receive initial diagnoses without the need for physical presence, thereby enhancing convenience and accessibility.

The implementation of telemedicine marks an initial stage of IT-enabled collaboration in the healthcare industry, and its benefits have been widely appreciated by healthcare professionals, especially in managing chronic diseases (Wong & Hazley, 2020; WTO, 2023).

ii. Big Data: The integration of big data and analytics has brought about a revolutionary change in the healthcare industry, enabling it to harness patient information effectively for personalized care. In the context of health tourism destinations, data analytics can play a crucial role in offering tailor-made treatment plans, predicting patient needs, and optimizing resource allocation, resulting in a more efficient healthcare system. Big data-based prevention and treatment plans hold significant benefits for medical and wellness tourism providers and their guests alike. However, with the advancement of IT, new challenges such as cybersecurity and data protection issues must be addressed (UNWTO, 2018).

iii. Blockchain Technology: The utilization of blockchain technology to enhance the security and efficient utilization of health data within the health tourism sector has garnered significant attention in recent years (Iryo.network, 2018). Blockchain, also known as distributed ledger technology, appears to be inherently well-suited for this industry, offering immutable, transparent, secure, trustworthy, and interoperable solutions (Balasubramanian, S., 2020). The adoption of blockchain by healthcare providers has the potential to enhance key aspects highly valued by medical tourists, including quality, accessibility, affordability, transparency, and security (Rejeb, et al., 2019). Moreover, by leveraging blockchain, the medical tourism industry can address prevailing challenges and inefficiencies.

iv. Electronic Health Records (EHRs): Digital transformation is significantly advancing healthcare data record management, transitioning from traditional paper-based systems to EHRs, digital version of the patients' medical records. This shift is a driving force in the digital revolution within the healthcare sector (Medical Tourism Magazine, 2020). EHRs offer numerous benefits, including increased transparency for health tourists, allowing access to their healthcare records from anywhere in the world (Tyan, I., et al., 2020). These digital records provide real-time and secure access to patients' medical information, treatment plans, and medications for healthcare providers. To enhance patient confidence, many health tourism travel agencies emphasize sharing EHRs with remote physicians.



*Image: Holoeyes VR Platform- Dubai-Tokyo-VR-Telesurgery
Source: Abdul Lateef Jameel Health*

v. Virtual Reality (VR) Applications: VR refers to a head-mounted computer that generates simulated experiences using auditory, visual, and haptic feedback (Egliston & Carter, 2021). This technology finds applications in the medical tourism and hotel industries, where hypervisor rooms, virtual strategies, and virtual reservation interfaces are commonly used. For instance, virtual treatment tours in the form of 3D videos allow clients to explore a hospital's surroundings and services in real time (Barnes, 2016).

During the pandemic, the World Health Organization (WHO) utilized augmented reality to teach COVID-19 participants and mental health professionals how to use virtual reality for treating patients with mental illnesses and emotional problems. The integration of Metaverse⁶ seems promising in assisting medical practitioners in various aspects of their work that involve these technologies (Ahmadi et al., 2022). In the USA, Stanford University's Medicine School introduced a novel software system that combines imaging data from MRIs, CT scans, and angiograms to create three-dimensional models. Physicians and patients can interact with these models similar to a virtual reality game. This system aids in resident training, surgical planning, patient education, and also provides guidance to surgeons during operations in a three-dimensional space (Stanford Medicine, 2017).

vi. Artificial Intelligence (AI): AI has significantly impacted the landscape of health tourism, leading to improved patient care and efficient resource allocation. The integration of AI technologies facilitates seamless interactions between healthcare professionals and medical tourists, even across geographical distances, enabling effective treatment recommendations and communication (Luxton, 2016). AI-driven chatbots and virtual assistants play a crucial role by offering real-time responses to frequently asked questions, guiding patients throughout the medical tourism process. Moreover, AI algorithms can efficiently analyse big datasets, tailoring treatment plans to individual patients, predicting outcomes, and elevating the overall quality of medical services in this domain. Additionally, AI and machine learning applications extend their benefits beyond clinical aspects, enhancing various health tourist activities, such as facilitating ticket acquisition, ensuring reliable transportation services, assisting with hotel accommodation, dining recommendations, providing tour guidelines, pictures taking and many other services (Osman, et.al., 2021).

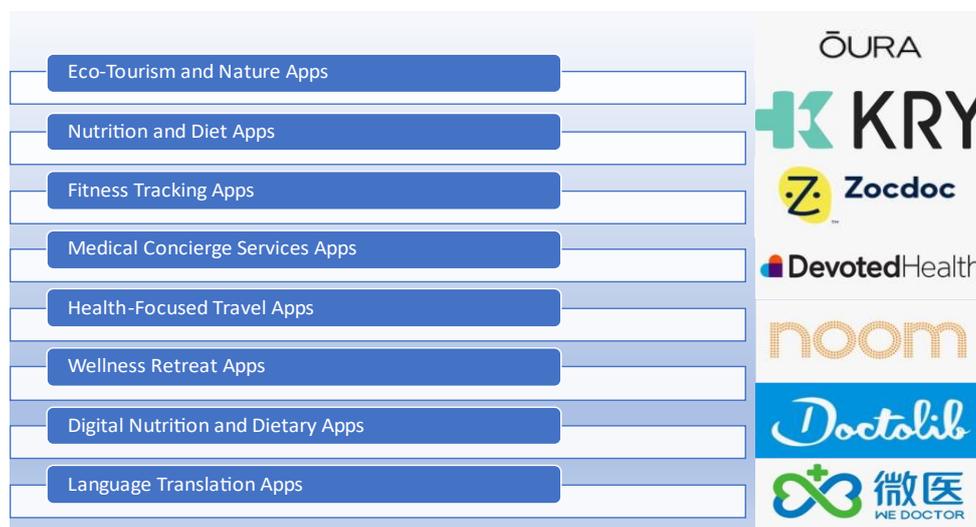
vii. Mobile Health (mHealth) Applications: The proliferation of smartphones and tablets, offering enhanced communication and computing capabilities, has sparked a significant rise in the adoption of mHealth solutions in the market. These mHealth systems play a crucial role in enhancing patient well-being and healthcare by facilitating seamless communication between medical practitioners and patients (Zapata et al., 2015). The World Health Organization (WHO) in 2011 defined mHealth as the utilization of mobile devices to support medical practices.

mHealth applications provide health-related services that are easily accessible to patients both in their homes and while on the move, enabling them to access information on demand, manage health records, and monitor chronic conditions such as diabetes, asthma, stress, and nutritional requirements in real-time (Klasnja & Pratt, 2014; Martin et al., 2014). These mobile apps also enable patients to search for medical facilities, compare treatment options, read reviews, and conveniently

⁶ The term "Metaverse" pertains to the domain of computer-generated, networked extended reality, often abbreviated as XR, which encompasses augmented reality, mixed reality and virtual reality (Anderson & Rainie, 2022).

schedule appointments. Moreover, they offer personalized health and wellness recommendations, empowering individuals to effectively manage their health during and after medical treatments.

Graph 5: Examples of mHealth Apps



Source: Authors' Analysis

These apps focus on various aspects of health tracking, including fitness, weight, diet, sleep, stress levels, fat loss, and skincare, among others. Self-health management is promoted through functionalities that monitor vital signs like blood pressure, heart rate, and breath rate, while also raising awareness about potential health risks, facilitating health record keeping, and more (Jusoh, 2017). Some examples of mHealth Apps are presented in Graph 5. Additionally, the integration of mHealth apps into smartphones encourages patients to proactively monitor their health conditions, generating substantial medical data that can be processed by computer systems. This has the potential to enhance the quality and efficiency of existing healthcare delivery models, transforming medical diagnostics and monitoring from human-centric practices to software-driven processes (Topol, 2015).

viii. Digital Platforms: Digital platforms play a crucial role in the domain of health tourism by offering a range of services such as remote consultations, virtual tours of medical facilities, and seamless data sharing for informed decision-making. These platforms enable patients to pre-book medical appointments, access wellness retreats and spa treatments, and engage in wellness events and educational content as well as they contribute to enhanced care coordination by securely sharing health information among various healthcare facilities. Overall, these digital platforms enhance the accessibility, efficiency, and empowerment of patients engaging in health tourism. Private health insurance companies are progressively embracing digital platforms, which include wearable devices and sensors for wellness plans and chronic disease management (Medical Tourism Magazine, 2018).

Virtual Health Platforms provide doctors with access to patients' medical data, enabling communication with specialists from the destination country where the patient intends to undergo the medical procedure through the Teleconsultation module. Essential tests, images, and pre-surgery information can be securely sent using the Virtual Health Platform. Patients can also use the platform to select their accommodation in the foreign country. During the patient's stay in the foreign country, their health status can be regularly monitored at the hotel before and after the operation. In case of emergencies, the patient's basic medical data can be retrieved from their USB device. After the patient

returns to their home country, their Personal Health Record will be updated with all relevant tests, images, and post-surgery information (Martinez, et. al., 2008).

A successful implementation of digital platforms in health tourism can significantly improve and facilitate communication among diverse healthcare institutions, including hospitals, clinician offices, and other organizations, thereby establishing an interoperability model in an international context and ultimately enhancing healthcare assistance for patients. These platforms can contribute to the diversification of tourism offers, all-in-one options for patients instead of booking hotels, treatments, flights, etc. separately and promote high-quality medical tourism in different international destinations. Moreover, the implementation of these platforms facilitates the free movement of patients across international borders, enabling them to seek medical services in various countries with ease and convenience.

These technologies and digitalization tools play a vital role in enhancing the health tourism experience, providing convenience, accessibility, and personalized care for health tourists seeking medical treatments or wellness-focused journeys.

4.2 The Role Digitalization in the Development of Health Tourism

The health tourism sector has experienced a remarkable transformation due to the rapid advancements in digitalization. This convergence of technology and healthcare has not only revolutionized the administration of medical treatments but has also profoundly restructured the entire health tourism panorama. As the momentum of digitalization continues to surge, its influence on this industry deepens, heralding a novel era characterized by improved accessibility, convenience, and excellence in global healthcare standards. This discourse explores the diverse ways in which digitalization propels the evolution of health tourism, spanning from enriching patient experiences and elevating treatment outcomes to streamlining cross-border healthcare solutions. In this section, the effect of digitalization in health industry and on its development, and future of digitalization in health industry is analysed.

The digital transformation has had a profound impact on many industries, including health tourism. Digital technologies have made it easier for people to access information about health tourism destinations and providers, book appointments, and track their health progress. This has led to an increase in the number of people who are interested in health tourism, as well as the number of destinations and providers that offer health tourism services. The integration of digital technologies in health tourism has brought about significant changes in the industry. Some of these key changes are as follows:

- i. **Improved access to information:** Digital technologies have significantly facilitated individuals' access to information concerning health tourism destinations and service providers. Research within the tourism sector emphasizes the profound influence of technology and contributes to the ongoing formulation of strategies aimed at enhancing the satisfaction of medical travellers. For instance, information technology has emerged as a pivotal element in granting foreign health tourists' effortless access to comprehensive details about treatments, procedures, expenses, and credentials (Lebevre & Bochatan, 2002). Additionally, technologies such as smartphones, social platforms, and web applications have introduced new options for patients to actively monitor their well-being and obtain an augmented wealth of information (Tech Target, 2021). In the domain of health tourism, various digital tools can be profitably integrated, point-of-sale systems tailored for cosmetic services, EHR

systems, and websites managed by destination management organizations (Cosmetisuite, 2019; Rezaei-Hachesu et al., 2017; Qi, Law, & Buhalis, 2008).

ii. Increased convenience: The appearance of digital technologies has substantially enhanced the convenience with which individuals can secure medical appointments and monitor their healthcare journeys. This encompassing advancement encompasses the online scheduling of appointments, the continuous tracking of medical interventions through web-based portals, and the facilitation of communication with healthcare providers via email or video conferencing modalities. This heightened level of convenience has notably amplified the allure of health tourism, particularly among individuals burdened by time constraints or geographical remoteness from established health tourism hubs.

iii. Improved Efficiency and Cost Savings: Digital health records and telemedicine have significantly enhanced administrative efficiency and reduced documentation burdens within the health tourism sector. The integration of digital health tools holds the potential to enable health systems to provide higher quality care more swiftly and affordably, thus optimizing constrained resources, including the scarcity of healthcare professionals. Furthermore, the utilization of virtual consultations and remote monitoring translates to financial benefits for both patients and healthcare providers, as they decrease the necessity for physical infrastructure and personnel. For instance, the use of technology may decrease in-person appointments for health tourists, particularly for follow-up sessions after returning to their home country, and thus results in more convenient and cost-effective experience. McKinsey (2023) projects that by 2030, widespread adoption of digital tools has the potential to unlock substantial savings: \$400 million to \$2.5 billion in Kenya (4 to 14% of total projected healthcare spending), \$700 million to \$3.3 billion in Nigeria (4 to 10% of total projected healthcare spending), and \$1.9 billion to \$11 billion in South Africa (6 to 15% of total projected healthcare spending).

iv. Personalized Healthcare Solutions: Personalized healthcare takes into account the unique genetic and biological characteristics of each patient before devising suitable treatment approaches. Cutting-edge tools like wearable devices and DNA sequencing have empowered medical professionals to pinpoint potential predispositions to diseases, catch illnesses in their early stages, and mitigate their impact. Leveraging artificial intelligence and data analysis further enables the tailoring of treatment strategies based on individual patient data, resulting in more favourable outcomes and enriched patient experiences. The integration of personalized health guidance through mobile applications also empowers patients to proactively manage their well-being.

v. Quality of Care and Patient Safety: The integration of digitalization has yielded comprehensive developments in care quality and patient safety within the realm of health tourism. Security imperatives within the healthcare domain revolve around safeguarding patient data, upholding privacy and confidentiality, and upholding the robustness and unaltered state of healthcare systems. The fulfilment of these security objectives assumes paramount significance in assuring the sanctity and security of patient information, thereby fostering reliance on this burgeoning technological landscape (Paul, M. et al., 2023).

vi. Marketing Opportunities: The rise of digital technologies has opened up new ways to promote health tourism destinations and providers. This involves using tools like social media, online

ads, and search engine optimization. These modern marketing methods have helped reach a bigger audience and attract more people to health tourism.

The upcoming years will witness a dynamic transformation in the healthcare sector as digitalization and health tourism intersect. With technology advancing rapidly and the world becoming more interconnected, the future of health tourism will be defined by unparalleled accessibility, convenience, and individualized care. The integration of digitalization, including telemedicine, data analysis, virtual reality, and blockchain solutions, is poised to reshape how people access healthcare while on the move.

4.3 Selected Good Practices

The intersection of healthcare and technology has led to a transformative shift in the landscape of health tourism that is analysed in the previous sections. As countries and companies recognize the immense potential of digitalization, innovative practices have emerged that not only enhance the quality of medical services but also streamline the overall patient experience. This section explores some of the noteworthy strategies adopted by various nations and organizations to harness the power of digitalization in the realm of health tourism.

4.3.1 Selected Practices from Countries

i. United Arab Emirates

a. **Dubai Health Authority (DHA) App:** The Dubai Health Authority (DHA) serves as the governing body overseeing the healthcare landscape in Dubai. DHA is responsible for establishing regulations, policies, and strategies that uphold the standard of healthcare, encompassing both public and private facilities. The DHA App emerges as an innovative initiative, consolidating all DHA services within a single smart application. This platform empowers users to access DHA's Smart Services, including managing appointments, retrieving lab results, and monitoring medications. Additionally, users can track their Medical Fitness Application Status, enrol as blood donation volunteers, and access the app in both English and Arabic (DHA, 2023).



Photo: DHA website home page. Source: dha.gov.ae/en

b. **Dubai Health Experience:** The Dubai Health Experience (DXH), conceptualized by the DHA, acts as a brand aimed at promoting DHA-licensed healthcare facilities and their services. Its goal is to establish Dubai as a prominent destination on the global health tourism map. Over 100 healthcare facilities are part of the 'DXH Group' program, each presenting their specialized services, expert doctors, and healthcare packages through the DXH website. This platform also aids health tourists

with valuable information, such as treatments, prices, contact information various visa types including medical tourism visas, travel and healthcare facilitators and hotel partners (DXH, 2023).

ii. Egypt

a. E-Health: In partnership with e-finance, Egypt's Universal Health Insurance Authority (UHIA) has introduced a novel venture called e-Health. This newly established company is dedicated to spearheading the advancement, administration, and execution of health technology and digital solutions. e-Health serves as a pivotal link within Egypt's health, medical, and insurance sectors, fostering collaborations that are comprehensive, cooperative, and sustainable, both within the nation and on an international scale. The primary objective of this endeavour is to leverage the digital platform of the Universal Health Insurance program to fulfil its mission. Aligned with Egypt's 2030 Sustainable Development Vision, the overarching goal is to attain universal health insurance coverage for every Egyptian citizen by 2030 through an innovative digital ecosystem (E-Health, 2023).

b. Telemedicine: The Telemedicine initiative, led by the Information and Communications Technology Trust Fund, aligns with Egypt's Vision 2030 and aims to enhance healthcare quality and accessibility in remote and underserved regions through technological solutions. Collaborating with global and local health stakeholders, the project implements cloud-based telemedicine solutions, expands the health service network, and strengthens training capabilities within the healthcare sector (MCIT, 2023). This comprehensive approach addresses citizens, medical professionals, and healthcare infrastructure, mitigating costs, reducing travel, and promoting medical technological solutions through remote telemedicine units. An electronic database for medical records improves resource management, allowing patients to seek medical advice using applications with assistance from mediators or physicians at equipped diagnosis units (Nader, 2022).

iii. Türkiye

a. e-Nabız: e-Nabız (e-Pulse), an initiative by the Turkish Ministry of Health, stands as Türkiye's reliable personal health record platform, designed for the efficient management of individual health data. This application facilitates citizens and healthcare practitioners in accessing health-related information obtained from various medical institutions through both internet and mobile devices. Whether medical examinations and treatments occur at diverse locations, this personalized health record system empowers patients to oversee their complete health profile and retrieve medical history from a singular, user-friendly interface. Notably, the Turkish Ministry of Health touts it as the world's most extensive and advanced healthcare information infrastructure, enabling patients to securely access their health records online. This endeavour not only expedites the diagnostic and treatment procedures but also fosters seamless communication between patients and their chosen physicians (e-Nabız 2023).

b. Türk Telekom – Healthverse PanoramicWeb Partnership: Türk Telekom, a prominent technology and communication state owned company in Türkiye, has joined forces with Healthverse PanoramicWEB to unveil an advanced telehealth digital platform. This platform brings together advisors, doctors, and patients in a virtual environment, marking a significant stride in the healthcare landscape. The collaboration introduces this cutting-edge solution at Liv Hospital, a leading private hospital group in Türkiye. Healthverse PanoramicWEB serves as a bridge between patient advisors, medical professionals, and patients in a digital realm. It empowers healthcare practitioners to fulfil their responsibilities within the hospital premises even when they're physically absent. This

remarkable achievement is made possible through the software's ability to replicate the hospital's interior in a digital format (Daily Sabah, 2023).

Liv Hospital anticipates substantial outcomes from their adoption of Healthverse PanoramicWEB. They expect both Türkiye's health tourism sector and the hospital's proportion of foreign patients to potentially double within a year due to the platform's capabilities (Liv Hospital, 2023).

iv. Digital Health Projects in Africa

a. African Digital Health Library: The African Digital Health Library (ADHL) constitutes a digital repository accessible through open channels, thereby ensuring universal availability and unfettered accessibility to a compendium of health-related knowledge and pertinent information. This repository encompasses contributions from participating nations within the Sub-Saharan African region, catering to the discernment of scholars, policymakers, practitioners, and the wider populace. The collaborative initiative materializes through a partnership involving the University of Florida and an online medical library based in Zambia. The crux of this collaboration resides in the facilitation of medical information dissemination, specifically tailored to the medical fraternity in Southern Africa (WTO, 2023).

In parallel, the Digital African Health Library takes the form of an integrated, smartphone-centric, point-of-care decision support system. This resource offers a reservoir of empirically substantiated, locally pertinent decision support tools and health-related information. Efficacious utilization of this resource has been evidenced to manifest in more judicious and informed patient care practices (Spider Center, 2023).

b. Africa Tele dermatology Project: The Africa Tele dermatology Project has been devised to provide comprehensive support to professionals and patients within the realm of dermatology across Africa. This support encompasses a diverse array of services, encompassing online consultation provisions, deliberations concerning the diagnosis and management of individuals afflicted with dermatological conditions, provision of educational resources, and facilitation of access to a specialized dermatologic curriculum tailored to African settings. Noteworthy African states engaged in this initiative comprise Botswana, Burkina Faso, Eswatini, Lesotho, Malawi, and Uganda (WTO, 2023). The Telemedicine initiative targets diverse beneficiary demographics, ranging from adolescents to the elderly, including healthcare professionals and self-utilizing individuals, employing a range of e-health applications for information access, diagnostics, treatment aid, disease surveillance, patient monitoring, and telemedicine services (ITU, 2023).

v. Singapore

a. HealthHub: HealthHub stands as a digital healthcare companion tailored for Singaporeans, offering comprehensive access to their personal medical records, connections to healthcare services and institutions, along with relevant information and tools to empower them in managing their health effectively. Functioning as a unified platform, HealthHub provides users the convenience of retrieving personal hospital records, lab test results (pertaining to chronic conditions), medical appointments, and referral letters from public healthcare establishments including polyclinics and hospitals. Furthermore, users can access immunization records for themselves and their children, dental health information, medication records, and even set up reminders for medication schedules. Through the Caregiver Access module, users can grant caregivers access to their health records and appointments (Smart Nation, 2023).

vi. United Kingdom

The NHS App offers a secure and convenient method for individuals to access a variety of NHS services via their smartphone or tablet. It encompasses all General Practitioner (GP) practices in England and the Isle of Man, establishing a comprehensive network of connectivity (NHS Digital, 2023).

With complete verified access, users are empowered to perform several essential functions. They can easily request repeat prescriptions and select a preferred pharmacy for collection, schedule and oversee appointments, review their GP health record containing details such as allergies and medications (if granted access to their comprehensive medical record, they can also view particulars like test results), arrange and manage COVID-19 vaccinations, obtain the NHS COVID Pass, record their organ donation preference, control data usage preferences by the NHS, retrieve their NHS number, and utilize NHS 111 online for prompt answers and medical advice localized to their vicinity (NHS UK, 2023).

vii. Croatia

The forthcoming establishment of ZagrebMed, an innovative digital platform in the realm of health tourism, is ready to make its debut in October of the present year. This initiative, conceived with the principal aim of advancing medical and health tourism, is strategically tailored to bolster the prominence of Zagreb, the capital city of Croatia. The platform is slated to encompass a consortium of approximately 20 leading healthcare establishments spanning diverse medical services (LaingBuisson, 2022).

ZagrebMed is set to empower patients with a direct channel for engaging with clinics and medical practitioners featured on the platform. By means of this interface, patients will readily access pertinent information and pricing particulars pertaining to their prospective treatment regimens. Moreover, the platform affords the capacity for patients to accord their assent to devised itineraries through the system. It is noteworthy that ZagrebMed operates in collaboration with affiliated hospital entities within the consortium, in addition to forging partnerships with Croatia Airlines for air travel provisions and Obzor Holidays for local travel and accommodations (ZagrebMed, 2023).

4.3.2 Practices from Companies

These brief snapshots offer insights into various entities within the healthcare and medical services sector, providing an overview of innovative solutions that cater to medical needs and improve patient care while creating a more enabling environment for the development of health tourism.

i. **Bookimed:** Bookimed, headquartered in Ukraine, stands as a prominent global digital platform that offers the means to search for medical facilities and arrange treatments for individuals across the globe. The company, founded in 2014, has evolved into one of the foremost medical tourism providers worldwide. With a monthly influx of over 300,000 users visiting their website seeking assistance, Bookimed has carved its reputations (Crunchbase, 2023).

ii. **Booking Health:** Booking Health functions as a portal enabling direct bookings for treatments in leading global clinics at affordable rates. The platform showcases over 250 highly accredited clinics around the world. Operating in 11 languages, Booking Health caters to patients from 75 countries, facilitating services related to diagnosis, treatments, rehabilitation, rejuvenation, and recreation. (Booking Health, 2023).



Photo: Booking health website home page. Source: bookinghealth.com

iii. **WhatClinic:** Dublin-based WhatClinic.com, established in 2006, operates with a workforce exceeding 60 employees, including remote staff from diverse locations. The company extends its services to help patients identify, compare, and book suitable clinics in over 135 countries. With an extensive database featuring more than 120,000 clinics encompassing medical practitioners, dentists, cosmetic surgery specialists, physiotherapists, fertility experts, and more, WhatClinic.com caters to a wide spectrum of medical needs. Every month, over 1.5 million patients utilize the platform to locate and evaluate clinics (WhatClinic, 2023).

iv. **RealSelf:** Operating from Seattle, RealSelf serves as a healthcare marketplace where individuals explore aesthetic treatments and connect with medical practitioners. The platform primarily focuses on plastic surgery, dermatology, and minimally-invasive procedures (RealSelf, 2023). The site boasts a registry of 30,000 registered doctors and practices, housing over 2 million reviews and having received 94 million visitors in 2017 (Soper, 2019).

Concluding Remarks

As technology changes rapidly, the way people travel for medical and wellbeing reasons has evolved. Technology is now integrated to health services. It is easier for patients to get good care, make things work more smoothly, and change how healthcare works. Countries have started to new technologies such as video appointments with doctors, exchange of data to understand health trends, and developing new ways to use technology. These developments increasingly allow patients and visitors to get help from doctors all around the world. It also helps doctors learn about new medical solutions and techniques.

The advent of digitalization has exerted a profound influence on the domain of health tourism, precipitating significant transformations in patient encounters, healthcare provider interplay, and fiscal ramifications. Understanding key trends and new developments in digitalization could up new avenues for development of health tourism in the OIC countries. To this end, the following policy implications could be considered by OIC countries:

- **Establishing a national health digitalization strategy:** Defining a comprehensive strategy is essential for effectively integrating digital technologies into health tourism. This strategy should

outline goals, action plans, and timelines, ensuring that digitalization aligns with broader national healthcare and economic objectives.

- **Creating a National Digital Health Tourism Brand and Increasing Brand Awareness:** Developing a distinct brand identity is crucial to showcase the unique offerings of the country's health tourism sector. Through a well-defined brand, OIC countries can project their strengths, such as advanced medical facilities, skilled healthcare professionals, and cultural experiences, to potential health tourists. Increasing brand awareness through targeted marketing campaigns will help attract a wider audience.

- **Official Health Tourism Website:** The creation of a dedicated website serves as a centralized platform where international patients can access comprehensive information about medical facilities, available treatments, pricing, and patient testimonials. A user-friendly website enhances transparency, establishes credibility, and assists potential health tourists in making informed decisions.

- **Promotion of the Brand via Social Media:** Social media platforms provide a powerful avenue for showcasing the country's health tourism brand. Engaging content, success stories, patient testimonials, and informative posts can reach a global audience, fostering engagement and building trust.

- **Attending & Organizing Events:** Participating in international health and tourism events allows OIC countries to showcase their capabilities to a broader audience. Moreover, hosting events related to health tourism not only attracts attention but also provides a platform to highlight the country's expertise, services, and opportunities for collaboration (i.e. OIC Health Tourism Expo).

- **Creating a regulatory and legal framework:** A clear and robust regulatory framework is essential to ensure the safety and integrity of health tourism services. By establishing rules governing digital health practices, patient data security, and ethical standards, OIC countries can improve trust for patients and healthcare providers.

- **Encourage public-private partnerships:** Collaborations between public healthcare systems and private sector entities can leverage each other's strengths. Public-private partnerships facilitate the exchange of expertise, resources, and innovative solutions, accelerating the growth of digital health tourism.

- **Investing in digital infrastructure:** A strong digital infrastructure, including high-speed internet connectivity and secure data systems, forms the backbone of effective digital health tourism. Adequate investments in these areas enable seamless telehealth services, data exchange, and efficient communication between patients and healthcare providers.

- **Digital skills training programs:** Equipping healthcare professionals with the necessary digital skills is vital for delivering high-quality virtual care. Training programs should cover the use of telemedicine platforms, data security protocols, and effective communication in the digital realm.

- **Promoting the use of digital marketing tools and e-health platforms:** Encouraging healthcare providers to utilize digital marketing strategies and adopt user-friendly e-health platforms enhances their visibility and accessibility to potential health tourists. Such platforms can provide detailed information about services, facilitate appointment scheduling, and enable remote consultations.

- **Innovation hubs:** Innovation hubs serve as collaborative spaces where experts from the technology and healthcare sectors work together to develop cutting-edge solutions. These hubs can foster the creation of novel technologies, applications, and services that enhance the health tourism experience.

- **Support research and development:** Investing in research and development projects related to digital health tourism fosters innovation. Such initiatives can result in the development of new technologies, processes, and practices that enhance the quality of care and patient experiences.

- **Digital health tourism startups:** Nurturing a startup ecosystem in the digital health tourism sector encourages entrepreneurial endeavours. Providing resources, mentorship, and incentives to startups can drive the creation of innovative solutions that address specific challenges within the industry.

- **Incentive Programs for Health Tech Companies:** Developing incentive programs that offer benefits to health technology companies can encourage them to invest in creating solutions tailored to health tourism needs. These incentives can range from financial support to streamlined regulatory processes.

- **Provide tax incentives and funding opportunities:** Offering tax incentives and funding opportunities for health technology companies can attract investment and stimulate the development of new digital health solutions. Additional incentives can be implemented in health tourism related investments.

- **Simplify regulations for tech companies:** Streamlining regulatory processes for technology companies looking to contribute to the health tourism sector can reduce barriers to entry and accelerate the pace of innovation.

- **Partnerships between start-ups and businesses:** Fostering partnerships between startups and established businesses can lead to a collaborative exchange of ideas, expertise, and resources. This synergy can result in the creation of innovative solutions that benefit health tourism.

- **Promote international collaboration:** Collaborating with other countries in the OIC and beyond can facilitate knowledge-sharing, best practice dissemination, and the establishment of common standards for digital health tourism.

- **Sharing of data and best practices among stakeholders:** Creating platforms for the exchange of data, experiences, and successful strategies among healthcare providers, regulators, and technology companies can drive continuous improvement and innovation.

- **Monitoring and evaluating:** Continuously assessing the effectiveness of digital health tourism initiatives through data-driven evaluations allows for necessary adjustments to strategies, ensuring optimal outcomes and patient satisfaction.

- **E-Visa Agreements for health tourists Between Members:** Streamlined e-visa agreements between OIC countries can simplify the process for health tourists and promote easier travel for medical purposes.

- **Data Analytics for Improved Decision-Making:** Utilizing data analytics to analyze patient preferences, treatment outcomes, and market trends empowers policymakers and healthcare providers to make informed decisions that enhance the health tourism experience.
- **International Collaboration and Standardization:** Collaborating with other countries on developing international standards ensures consistent quality, safety, and interoperability of digital health tourism services. This collaboration fosters trust among health tourists and contributes to the industry's growth.

Chapter 5

5. REVIEW OF EXPERIENCES OF THE SELECTED OIC COUNTRIES IN HEALTH TOURISM

This chapter examines the current state of health tourism in six selected member countries of the OIC. Specifically, these countries - Tunisia and Qatar from the Arab region, Türkiye and Malaysia from Asia, and Senegal and Mozambique from Africa - collectively represent the OIC's regional diversity. With a mutual commitment to economic progress and cooperation, OIC countries increasingly acknowledge health tourism as a promising avenue to achieve their developmental aspirations in tourism and beyond.

5.1 Selected Country Experiences

5.1.1 Mozambique

i. Current Situation

As a member of the OIC, Mozambique is both a coastal paradise – with around 2,500 km of white-sand beaches and a unique coastline offers touristic attraction sites. It is also a wildlife utopia, with conservation projects covering approximately 15% of the country's surface area. While the country has untouched beaches, unspoiled nature along with a rich historical landscape of architecture, the country's tourism sector has untapped potential. Yet, this has started to change in recent years as the country starts offerings in niche tourism segments like health and spa & wellness tourism. With the emergence of such niche tourism segments in the country, the tourism sector started to grow rapidly in recent years. This also helped the country in the recovery phase following the pandemic.

In 2019, before the outbreak of the pandemic, it hosted more than two million international tourists that generated a revenue of \$ 324 million (SESRIC, 2022). WTTC (2023) estimated that the contribution of the travel and tourism sector in the country was around \$ 700 million, made up 4.1% of its annual GDP, that generated employment for more than a half million people in the country in 2021.

Not only by diversifying its offerings but also Mozambique has increased its popularity as a destination by means of improvements in the readiness of Information and Communication Technologies (ICTs), resulting from increased use of digital booking platforms such as Trip Advisor, booking.com, use of social networks for advertising, tax reduction and taxes on air transport (Deloitte, 2018).

In particular, Mozambique is increasingly becoming an attractive destination for international travellers seeking medical treatments and wellness services. Mozambique, located in south-eastern Africa, boasts a diverse landscape and rich cultural heritage, making it an appealing choice for health tourists. A number of factors contribute to Mozambique's potential as a health tourism hub:

- **Healthcare Infrastructure:** Mozambique has made significant strides in improving its healthcare infrastructure. Major cities like Maputo, Beira, and Nampula offer modern healthcare facilities equipped with state-of-the-art medical equipment and qualified healthcare professionals.
- **Increasing Accessibility:** The country has experienced steady economic growth, leading to improvements in transportation and connectivity. The availability of international flights to key cities in Mozambique makes it easier for health tourists to access the country and its major cities.

- **Natural Resources:** Mozambique is renowned for its exotic beaches and pristine wildlife reserves, making it a perfect destination for wellness tourism. Tourists can combine medical treatments with leisure activities, such as spa retreats, yoga, and eco-tourism, to promote overall well-being.

- **Political will:** Mozambique has acknowledged the importance of health tourism as a niche market to support the growth of the tourism industry. To this end, policies and strategies were put in practice to reflect the existing political will to practice and provide an enabling environment for stakeholders.

ii. Strengths of Mozambique in Health Tourism

The Mozambican government has recognized the potential of health tourism and has taken steps to promote the industry. In particular, in cooperation with the UNWTO, Mozambique developed the “Strategic Tourism Development Plan 2015-2024” that provides a detailed strategy and action plan for directing government and private sector interventions in the tourism sector. The development of such a plan is a strong signal for potential investors as well as tourism stakeholders that could enable the growth of the tourism sector.

The government of Mozambique has streamlined the visa process for medical travellers and implemented policies to facilitate international medical collaborations and partnerships with private healthcare providers. To harness the potential of health tourism fully, Mozambique has engaged in strategic marketing campaigns to position itself as a premier health tourism destination. These efforts focus on promoting the country's unique healthcare offerings, coupled with its natural beauty and cultural heritage. The government has encouraged partnerships between local healthcare providers and international medical institutions.

iii. Investment Opportunities

Traditionally Mozambique hosts international travellers from South Africa the most. Around half of international travellers arrive from South Africa. Besides, international arrivals from three developed countries namely Portugal, the United States and the United Kingdom made around 15% of all arrivals in 2021 (WTTC, 2023). This structure of international arrivals has a great potential as tourists with relatively more per capita income could be directed to health and wellness tourism in Mozambique, if properly promoted and managed. This could also offer a great potential for investors in medical and wellness tourism.

In 2019, the President launched the “One District, One Hospital” initiative, aimed at providing quality health care and the provision of essential services to the population over a period of five years. Moreover, the initiative aimed to establish well-equipped hospitals in 154 districts with the following facilities: operating room, orthopaedics, laboratory, radiology, and blood bank (Club of Mozambique, 2019). Investing in the expansion and modernization of healthcare facilities would enhance the country's medical tourism potential.

Developing wellness retreats and spa centres that incorporate traditional Mozambican healing practices can attract tourists seeking relaxation and rejuvenation. In particular, a number of high-end hotels and resorts in Mozambique have already incorporated spa and wellness facilities into their offerings. These establishments provide a range of treatments, including massages, yoga sessions,

meditation, and other holistic therapies, attracting tourists seeking to de-stress and rejuvenate. Their positive experiences could attract new investors to the country.

Mozambique's diverse cultural heritage has contributed to a variety of traditional healing practices. Wellness tourists can experience these ancient remedies, such as herbal medicine and rituals, as part of their wellness journey, adding a unique cultural dimension to their experience. Activities like nature hikes, beach yoga, and marine-based therapies (e.g. swimming with dolphins) promote well-being while fostering a connection with nature. These unique offerings also make Mozambique an attractive destination for investors.

iv. Investment Opportunities

Mozambique's government has enacted the Investment Law and Regulations with the primary objective of fostering and attracting both domestic and foreign investments across various economic sectors. These strategic incentives aim to stimulate the development of essential infrastructures, boost rural trade and industry, support manufacturing and assembly industries, enhance the agricultural and fishing sectors, and promote the growth of the hotel and tourism industry. Additionally, these incentives extend to science and technology parks, mega projects, fast-development zones, industrial free trade zones, and special economic zones, underlining the government's commitment to economic diversification and expansion. (ICLG, 2023)

One of the key incentives offered is the exemption of taxes and customs duties, creating a favourable investment climate. Furthermore, investors can benefit from the flexibility to repatriate their funds and expand their workforce by hiring more expatriate workers than previously permitted by law. These incentives are tailored to the specific economic and industrial activities, as well as the geographic location of the investment project. This comprehensive framework under the Investment Law contributes to making Mozambique an increasingly attractive destination for investors, further driving economic growth and diversification in the region.

In particular, investments made in Maputo City stand to gain from a unique incentive - a 5% deduction on the total real investment for activities within the project scope for a period of five fiscal years. This investment tax credit encourages the growth of the urban economy and contributes to the city's development. Mozambique's investment incentives, grounded in a range of tax and customs benefits, free funds repatriation, and sector-specific advantages, position the country as an enticing destination for both domestic and foreign investors, ultimately fostering economic progress and enhancing the nation's business landscape. (Apiex, 2023)

v. Lessons Learned

Mozambique has a number of advantages that make it a promising destination for health tourism. The government is committed to developing the industry, and there are a number of investment opportunities available.

Mozambique's journey in developing health tourism provides valuable lessons for other countries aspiring to tap into this lucrative industry. First and foremost, there is a will to unleash the tourism potential of the country by exploring authentic experiences and niche tourism markets including medical and wellness tourism. The availability of visa free arrival from many countries around the globe and warm hospitality makes the experience of international tourists more relaxing in Mozambique. Besides, Mozambique has worked with various stakeholders and prominent

international institutions including UNWTO to unleash its tourism potential and realize its objectives. This successful strategy enabled the take-off of various tourism services and offerings particularly wellness and spa tourism in the country.

Overall, Mozambique's growing appeal as a health tourism destination is a result of its improving healthcare infrastructure, government initiatives, and natural beauties (Deloitte, 2018). By capitalizing on these strengths and investing in targeted areas, Mozambique can host a growing number of medical tourists and establish itself as a prominent player in Africa and beyond.



Photo: A view from Machangulo Beach Lodge, Maputo, Mozambique.

5.1.2 Senegal

i. Current Situation

Senegal, situated in West Africa along the Atlantic Ocean coast, is recognized for its stability on the African continent since its establishment in 1960. Bordered by Mauritania, Mali, Guinea, and Guinea-Bissau, Senegal covers nearly 197,000 sq. km. and has a population of approximately 17 million. Due to its geographical proximity to Europe and the Americas, Senegal is perceived as an entry point to Africa, offering a diverse landscape and political stability that appeal to tourists and investors alike. The Senegalese economy benefits from the travel and tourism industry, which contributed significantly to the GDP through both domestic and international spending, amounting to \$800 million directly and \$2.2 billion indirectly. This sector represented 9% of the total GDP in 2019 and supported 369,000 jobs. The utilization of digital platforms to align with market preferences and competitors' strategies is anticipated to enhance Senegal's destination competitiveness and market share, fostering potential gains beyond baseline growth (Tourism Economics, 2021).

Air arrival data from 2016 provided by the Ministry of Tourism reveals that neighbouring countries, including Guinea-Bissau and Mali, accounted for 24,345 and 14,636 tourists, respectively. Furthermore, European nations notably contribute to Senegal's tourism demand, with France leading the list at 171,138 visitors, followed by Benelux countries, Spain, Italy, and other European nations (Ba, et al., 2023).

Senegal's public sector encompasses state-funded health facilities, encompassing hospitals, health centers, and health posts, primarily concentrated in urban areas, particularly Dakar (Brunner et al., 2016). The private sector, constituted by for-profit clinics, NGOs, faith-based organizations, and civil society entities, is also prevalent, albeit in fewer numbers than the public sector (Brunner et al., 2016). Traditional medicine providers, numbering around 1000, operate across both sectors (WHO, 2019). Despite being recognized as a West African health services hub, medical tourism is a developing one in Senegal. Notwithstanding, the country's technical facilities and medical expertise stand out, driving

its attractiveness for investments in the health sector. Specialized clinics, notably in Dakar, are emerging to provide quality care, reducing overseas medical treatments, and positioning Dakar as a sub-regional medical hub (Apix Senegal, 2023).

ii. Strengths of Senegal in Health Tourism

Senegal has emerged as a prominent destination for health tourism, attracting patients from several ECOWAS countries. The country possesses substantial attributes that lend themselves to further advancing its health tourism appeal and attracting a broader base of health tourists. Noteworthy among these attributes are its strategic geographical position and openness, enhancement of its medical technological infrastructure, establishment of numerous private clinics, a distinguished medical corps, and a prestigious medical faculty with recognition as a regional reference and hosting a CAMES (Conseil Africain et Malgache pour l'Enseignement Supérieur) aggregation preparation center. Multiple factors contribute to Senegal's potential as a hub for health tourism (Apix, 2023):

Strategic Geographical Position: Senegal enjoys inherent advantages conducive to its emergence as a competitive hub for investment in the services sector, particularly health tourism. These advantages encompass an annual abundance of 3,000 hours of sunshine, oceanic temperatures hovering around 25°C, an expansive 700-kilometer coastline, proximity to key source markets, a profoundly rich historical and cultural heritage, and a diverse array of natural and cultural assets.

Botanical Resources: The country benefits from a diverse array of botanical resources with potential medicinal applications. A nearly one hundred-strong repository of medicinal plants coupled with expertise in phytotherapy underpins the foundation for cultivating medical tourism that capitalizes on Senegal's natural resources.

Specialization: The emergence of specialized medical clinics catering to diverse fields of medicine, notably sought after by individuals from neighbouring regions such as Mauritania, Gambia, and Mali, underscores Senegal's growing prominence in the medical domain. Advanced domains encompassing medical imaging, nephrology, mammography, and biomedical analyses have exhibited significant expansion over the past decade.

Microclimate: The presence of a distinctive microclimate fostering a sense of freshness within the Saloum islands, characterized by islets surrounded by mangrove ecosystems and numerous inlets, has facilitated the establishment of hotels and picturesque tourist camps that offer rejuvenating treatments such as mud baths and thermotherapy, capitalizing on the region's unique ecosystem and mineral-rich environment.

Human Capital: Senegal's robust expertise in the healthcare sector is widely acknowledged, epitomized by accomplished medical practitioners proficient in their respective domains. Furthermore, the country's medical faculty plays a pivotal role in the region, educating individuals from the neighbouring sub-region and the Maghreb.

Infrastructure: The well-developed infrastructure encompasses an extensive network of private clinics and specialized centres offering a diverse spectrum of treatments, as well as state-of-the-art diagnostic facilities and modern laboratories for comprehensive analyses.

iii. Investment Opportunities

Senegal is targeting to position itself as an investment hub within the health sector. However, for the expansion of its service offerings in this sector, a strategic elevation to the higher echelons is imperative. This strategic shift is envisioned to beckon investors in advanced fields such as medical biotechnology, cancer institutes, and pharmaceutical analysis laboratories. To solidify its stature as the preferred health services hub in the sub-region, Senegal is compelled to diversify its opportunities to become a more attractive destination. Considering the ongoing investments and initiatives within the nation:

The hospitality industry assumes a prominent role in attracting foreign investments, evident in the pipeline of developmental projects. Notable among these is the inauguration of establishments such as a Golden Tulip (Hotel Chain) with 118 rooms, Days Hotel & Suites boasting 84 rooms, and the Hyatt Centric featuring 150 rooms, all in 2019. The trajectory continues into 2020 with the Movenpick, a 460-room facility, announced by Accor and set to open at the airport. Additionally, a midmarket hotel, developed by Mangalis, is also in development. In the foreseeable future, a substantial influx of approximately 3,200 new rooms is anticipated. This encompasses diverse projects such as an Azalai property along the Corniche, the Sheraton/Aloft duo in Almadies, Dakar, the forthcoming largest seaside resort in West Africa by Club Med, and the establishment of two new hotel clusters – one at Pointe-Sarène comprising 1,600 rooms focused entirely on resorts, and the other at Lac Rose with 1,000 rooms catering to mixed business and leisure (Dot News, 2019).

The Ministry of Tourism and Leisure in Senegal orchestrated a series of events under the "Ñu Dem Ndar" campaign, translating to "Let's go to Ndar" in Wolof, signifying the old town of Saint-Louis. This initiative, launched in March, underscores the nation's commitment to promoting its rich tourism heritage not just to international visitors but also its citizens. The campaign serves a dual purpose: showcasing the nation's diverse attractions and products while concurrently enhancing local expertise in the tourism sector. This specific endeavour spotlighted the captivating natural sites and indigenous products of the Saint-Louis region, epitomizing the nation's holistic approach to tourism promotion (African Business, 2023).



A view from Petite Cote Beach, Senegal. Source: Discover Senegal

Aligned with Senegal's strategic goals, the Tourism and Enterprise Development Project is designed to foster private investment within the 'Saly' area, thereby bolstering enterprise growth across the nation. In harmony with the Government of Senegal's aspiration to elevate the country to an emerging economy by 2035, as delineated in its strategic plan, the project signifies a commitment to catalyzing inclusive growth, spurring job creation, and augmenting the investment climate's allure. This

multifaceted initiative seeks to enhance competitiveness, stimulate private investment, foster enterprise establishment and expansion, boost exports, and ultimately establish Senegal as a pivotal regional tourism nucleus, consequently amplifying employment opportunities (World Bank Group, 2023).

iv. Investment Incentives

Senegal's Investment Code offers various investment incentives, such as temporary exemptions from customs duties and income taxes, based on several factors. Eligibility for these incentives depends on factors like the size of the firm, the nature of the activity, the potential investment amount, and the project's location.

To qualify for significant investment incentives, companies must invest an amount exceeding CFA 100 million (approximately \$165,000) or engage in activities that result in a 25 percent or greater increase in productive capacity. Investors can also deduct up to 40 percent of their retained investment over a five-year period. Under the "Common Regime", investments can enjoy two years of import duty exemption for goods not locally produced (for small and medium-sized enterprises) or three years for others. Additionally, there is an exemption from direct and indirect taxes during the same period.

Investors who utilize local resources for at least 65 percent of their total inputs within a fiscal year can be exempt from the Minimum Personal Income Tax and Business License Tax. Furthermore, enterprises located in less industrialized areas of Senegal may benefit from an exemption of the lump-sum payroll tax of three percent, with the exemption period ranging from five to 12 years, depending on the investment's location. The Investment Code also allows for a phased-out exemption from income tax, duties, and other taxes during the last three years of the relief period. (US Department of State, 2023)

v. Lessons Learned

Effective development of health tourism requires close collaboration between the government, private sector, and healthcare professionals. To establish credibility among health tourists, adhering to international quality standards and obtaining relevant accreditations is crucial. Diversifying the range of medical treatments, wellness services, and cultural experiences can attract a wider spectrum of potential visitors.

Regarding the progression of health tourism in Senegal, it is evident that concentrating efforts on wellness tourism is more viable than focusing on medical tourism due to the latter's dependency on advanced and sophisticated technological infrastructure. This perspective was shared by stakeholders within Senegal's sector and regions actively involved in pioneering this emerging tourism facet. The dearth of essential infrastructure, materials, and medical equipment impedes the introduction of health tourism, even within labour-intensive domains. Consequently, in Senegal's context, wellness tourism appears to be the more attainable option for near and medium-term progress, diverging from South Africa's emphasis on medical tourism (Ba., et al., 2023). Despite encountering challenges, targeted investments, stringent quality assurance measures, and strategic marketing endeavours have the potential to elevate Senegal's health tourism sector.

5.1.3 Qatar

i. Current Situation

Qatar, situated on a peninsula extending into the Arabian Gulf, is rapidly advancing in the Middle East through progressive investments, modernization endeavours, and regulatory facilitation. Its strategic location is bordered by Saudi Arabia to the south and the United Arab Emirates to the west. The estimated population in 2023, as per Worldometer data, stands at 2.716 million, with a predominant expatriate presence.

The government's substantial investments in tourism infrastructure, encompassing hotels, resorts, and attractions, underscore Qatar's commitment to development. Renowned cultural landmarks, such as Souq Waqif, the Museum of Islamic Art, and the National Museum of Qatar, augment the country's attraction. A remarkable stride in Qatar's tourism trajectory was the successful hosting of the 2022 World Cup. This monumental event, executed flawlessly, not only heightened visitor contentment but also enhanced Qatar's global reputation. Strategically located within a convenient hour's commute from central Doha, all eight cutting-edge stadiums were seamlessly accessible via metro, bus, and taxi services. The FIFA World Cup 2022™ drew more than 1.4 million enthusiasts worldwide (Qatar2022, 2023). Social media was abuzz with the event, recording 93.6 million posts across platforms, reaching an aggregated audience of 262 billion, and garnering 5.95 billion engagements (FIFA, 2023). The World Cup played a pivotal role in reviving Qatar's tourism sector, evidenced by a remarkable surge in international visitors in 2022—exceeding 2.6 million and marking an astonishing 319% growth compared to 2021.

In the healthcare domain, Qatar stands as a beacon of progress in the Middle East and North African (MENA) region. With rapid strides, the nation transitioned to offer universal healthcare to its citizens and legal residents, embracing the coexistence of both public and private sectors. With an annual healthcare expenditure exceeding \$3 billion, Qatar ranks among the highest healthcare spenders per capita in the Gulf and the Middle East (Patricia, 2022). Qatar's ascent as a global healthcare frontrunner is propelled by substantial public investment, modern facilities, and an innovative medical technology sector.

The Ministry of Public Health (MoPH) spearheads policy and strategy formulation, aligned with Qatar National Vision 2030's vision for a modern healthcare system grounded in global standards (Oxford Business Group, 2020). Guided by the National Health Strategy (NHS) 2018-2022, Qatar aims to bolster information sharing among healthcare providers, building upon past accomplishments.

Public healthcare is mainly delivered by two government entities: the non-profit HMC and the independent PHCC. These entities serve over 90% of the populace, with PHCC focusing on primary care and HMC on inpatient services. HMC's 12 hospitals include specialized and community facilities, with a cumulative bed count of around 2500. The PHCC operates 27 health centers, including the Qatar University Health Centre (QUHC), designed to accommodate 35,000 individuals with diverse medical services (Oxford Business Group, 2020). Qatar's private healthcare landscape encompasses six hospitals and over 200 polyclinics and medical centers, with an anticipated 25% increase in private hospital beds by 2022 (Oxford Business Group, 2020). Notable private providers like Sidra Medical and Research Centre (SMRC) play a vital role in tertiary care, contributing significantly to patient treatment capacity (Oxford Business Group, 2020).

ii. Strengths of Qatar in Health Tourism

With its highly developed infrastructure, well-educated and youthful workforce, supportive business environment, and exceptional quality of life as the world's safest country with a top-notch healthcare system, Qatar stands out as a prominent healthcare provider in the Middle East's business arena. Some of the key strengths of Qatar in health tourism:

- **Economic Stability:** The Qatari economy demonstrates stability and resilience, evident through a consistent annual GDP growth of around 4.8% since 2009. This growth is complemented by a moderate average inflation rate of 1.26% spanning from 2010 to 2022. Notably, Qatar ranks fourth globally in terms of GDP per capita (World Bank, 2022).

- **High-quality healthcare:** Qatar boasts a world-class healthcare system characterized by cutting-edge hospitals and clinics equipped with the latest technological advancements. The nation has instituted a robust regulatory framework to uphold the quality and safety of medical services for health tourists. Oversight from the Qatar Council for Healthcare Practitioners (QCHP) ensures the licensing and accreditation of healthcare professionals. Rigorous regulations are in place to uphold elevated standards of care while safeguarding patient rights. Presently, Qatar is home to 23 organizations accredited by the Joint Commission International (JCI), attesting to its commitment to excellence.

- **Convenience:** Qatar's compact size facilitates easy navigation, contributing to an uncomplicated and accessible experience for medical tourists. The nation's efficient transportation system further enhances convenience. With Hamad International Airport as a bustling gateway, a remarkable around 100 thousand passengers journey to over 160 destinations daily, streamlining travel arrangements for visitors.

- **Safety:** With a notably low crime rate, Qatar stands as a secure and secure destination, instilling confidence among medical tourists concerned about their well-being. The country's commitment to safety provides an environment conducive to focused medical care and a worry-free experience

- **Geographical Location:** Strategically located at the crossroads of East and West, Qatar maximizes its geographical advantage to connect with over 2 billion individuals across more than 25 economies, contributing to a combined GDP of \$6 trillion, all within a 3,000-kilometer radius. The country nurtures an environment conducive to entrepreneurship, aligning with its global ranking of the fourth-highest GDP per capita (World Economic Forum, 2022).

- **Infrastructure:** Qatar's evolution into a thriving hub combines forward-looking infrastructure, enduring hospitality, and unmatched connectivity, making it an appealing arena for potential investors. The synergy of substantial resources, forward-thinking infrastructure, and exceptional connectivity generates a landscape full of opportunities (Ministry of Commerce and Industry, 2021).

- **Telemedicine:** Qatar emerges as a pioneer in telemedicine, trailblazing the concept of virtual consultations, allowing patients worldwide to access medical expertise from Qatari physicians regardless of their location. Demonstrating its dedication to innovation, Qatar leads in the development of artificial intelligence (AI)-powered healthcare solutions aimed at improving the quality and affordability of care (Qatar Computing Research Institute, 2021).

- **Legal Framework:** In safeguarding the rights of medical tourists, Qatar has established a robust legal framework. This framework includes measures to protect medical records' privacy and prevent discriminatory practices against medical tourists. The nation's flexible visa policies,

particularly beneficial for individuals facing visa limitations in regions like the US and Europe, streamline entry procedures (Ministry of Public Health, Qatar, 2021).

iii. Investment Opportunities

Qatar's prominence in the global medical sector is underscored by its fourth-ranking position, as assessed by Invest Qatar. With an initial investment outlay of \$5.8 billion and a commitment to further infusion into the market, Qatar's trajectory aligns with the Qatar National Vision 2030. This expansion of investments not only reflects the nation's economic resilience but also signifies its dedication to fostering the health and well-being of its citizens and residents. The concerted efforts to propel healthcare systems forward have propelled Qatar to a noteworthy status among the world's premier medical sectors. According to the Global Health Security (GHS) Index, Qatar's health industry has witnessed a remarkable ascent of 16.9 % since 2019 (The Peninsula, 2022).

- **Qatar Health 2022 Strategy:** Unveiled by the Qatari government, this strategy serves as a cornerstone for enhancing healthcare services, research, and education. Its overarching aim is to elevate Qatar's standing as a regional healthcare hub (Ministry of Public Health of Qatar, 2018).

- **Public Projects:** public sector endeavours in 2020 encompassed the expansion of HMC facilities and the establishment of new health centres. Additionally, the 2020 budget bolstered ongoing plans for constructing new laboratories and developing five health centres in Al Wakrah, Al Mashaf, Al Saad, Al Khor, and Ain Khaled (Oxford Business Group, 2020).

iv. Investment Incentives

Qatar, a nation known for its rich population, is aiming to bolster its healthcare industry in line with its National Vision 2030 (QNV 2030) initiative, concentrated on fostering a knowledge-based and diversified economy. In pursuit of this vision, the Qatari government has recently undertaken significant reforms to its foreign investment and property ownership regulations, permitting 100 percent foreign ownership in various sectors and designated real estate areas. These reforms aim to entice foreign investors and fortify Qatar's standing as a preferred investment destination. (US-Qatar Business Council, 2022)

In its quest to attract foreign capital, Qatar offers variety of compelling incentives. Notably, non-Qatari investors may enjoy a tax exemption for up to a decade, a considerable enticement. Moreover, they can benefit from customs duty waivers on imported machinery and equipment essential for their projects, further facilitating the investment process. The Qatari government extends its support by providing long-term, renewable land leases of up to 50 years, offering a stable foundation for foreign ventures. Furthermore, in pursuit of bolstering the industrial sector, customs fees are waived for non-Qatari investors importing raw materials or semi-finished goods necessary for production, fostering an environment conducive to growth.

General privileges are offered to non-Qatari investors include the liberty to conduct wealth transfers related to their investments from abroad into Qatar in any convertible currency. This flexibility, coupled with the assurance that foreign investments will not face expropriation or similar actions, as per the regulatory framework, gives confidence in investors. Notably, non-Qatari investors can also transfer ownership of their investments to other non-Qatari or national investors, thereby providing flexibility and ease of operations. In this fervent pursuit of economic diversification and the

fortification of the healthcare sector, Qatar's strategic incentives and regulatory amendments beckon foreign investors to partake in the nation's promising economic landscape. (Qatar Chamber, 2023)

v. Lessons Learned

Qatar emerges as a prospective destination for health tourism. Anchored by a superlative healthcare infrastructure, cost-efficient living conditions, and an environment characterized by safety, Qatar's intrinsic attributes position it favourably for health tourism. The governmental authorities are proactively enacting a series of strategic measures to stimulate the propagation of health-related tourism. Projections indicate a sustained upward trajectory for health tourism in Qatar over the forthcoming years. Moreover, the proficient promotion of health tourism has evidenced tangible success in the attraction of overseas patients. The amplifying impact of the World Cup 2022 on Qatar's national image and reputation further augments its allure in the international context.

Furthermore, Qatar's potential to assimilate novel and pioneering global technologies locally, notably encompassing M-Health and Patient Disease Monitoring Solutions, underscores the commitment to elevate healthcare outcomes. The adoption of such innovations is poised to catalyse enhanced health services, thus aligning with the nation's trajectory of progress.

In order to fortify its tourism sector, it is imperative for Qatar to channel its efforts toward the cultivation of premier health tourism products of utmost quality. This strategic emphasis on product development holds the key to augmenting Qatar's standing as an alluring health tourism destination.

5.1.4 Türkiye

i. Current Situation

Türkiye borders with eight countries Bulgaria, Greece, Georgia, Armenia, Azerbaijan, Iran, Iraq, and Syria. According to the UNWTO Tourism Database, Türkiye welcomed a staggering 50.4 million tourists in 2022, securing its position as the third most-visited country globally, marked by a remarkable 68% surge from 2021. The country, blessed with a full spectrum of seasons, is geographically endowed with historically and culturally rich sites like Istanbul, Cappadocia, Göbeklitepe, and the ancient city of Ephesus. It also boasts picturesque coastal areas with splendid beaches in destinations like Antalya, Marmaris, and Bodrum.

Türkiye has been progressively establishing its presence in the global health tourism arena. While Istanbul caters to a wide array of health tourism services, Izmir and its environs specialize in aesthetic services, and the Antalya region excels in dental treatments. The statistics for 2022 reveal that 1.2 million patients availed themselves of health tourism services, amounting to a revenue of \$2.1 billion. The first and second quarters of 2023 saw a total of 740 thousand individuals seeking health services in Türkiye, generating an income of \$1.03 billion. The most sought-after medical branches by international patients include gynaecology, internal diseases, ophthalmology, medical biochemistry, general surgery, dentistry, orthopaedics and traumatology, infectious diseases, and otorhinolaryngology (USHAŞ, 2023). Türkiye's successful foray into health tourism can be attributed to several factors:

- **Affordable Prices:** Renowned for its blend of affordability and top-notch healthcare services, Türkiye stands out against its developed counterparts.

- **Experienced Medical Professionals:** The country boasts a pool of skilled medical practitioners. Currently, there are 118 medical schools and the total number of students in these faculties in Türkiye in 2022 is 112,058 (Odabaşı, 2023). Moreover, 151 nursing schools are accepting around 13,000 students every year.
- **High-Quality Medical Facilities:** Türkiye's hospitals uphold exemplary standards of quality. Currently, there 36 JCI accredited organizations in Türkiye.
- **Reduced Waiting Times:** Unlike the lengthy waiting periods in the EU and the US, Türkiye offers prompt medical attention. For instance, surgical procedures are often completed within two weeks, whereas knee surgery in the EU and the US may require waiting up to 18 months.
- **Comprehensive Health Tourism Packages:** Türkiye's health tourism offerings encompass a range of services, ensuring a hassle-free experience for visitors. These packages include accommodation, meals, VIP transfers (and sometimes flights), personal guides, and more.
- **Convenient Accessibility:** Türkiye's strategic location bridging Europe and Asia facilitates effortless travel for medical tourists from various regions, minimizing logistical complexities.
- **Governmental Support:** The government's robust backing of the health tourism sector, including policies, incentives, and infrastructure development, fosters an environment conducive to effectively catering to international patients.

ii. Strengths of Türkiye in Health Tourism

Türkiye's prominence in the realm of health tourism is underscored by a range of compelling advantages that position it as a sought-after destination for global medical travellers:

Global Diaspora Connection: Türkiye's extensive and diverse global population serves as a valuable asset, forming a broad network of diaspora communities that effectively function as conduits for the promotion of health tourism and the attraction of visitors.

Abundant Skilled Workforce: Supported by a robust healthcare infrastructure, Türkiye boasts a considerable reservoir of proficient medical professionals who deliver exemplary medical care and specialized treatments to international patients, ensuring world-class healthcare services.

Strategic Health Tourism Promotion: Dynamic marketing initiatives and precisely targeted promotional strategies spotlight Türkiye's adept medical capabilities, modernized facilities, and appealing health tourism packages, effectively reaching and engaging potential health tourists on a global scale.

Technological Excellence: Through the adoption of cutting-edge medical technologies and advanced treatment methodologies, Türkiye positions itself as a hub for pioneering medical procedures, captivating tech-savvy medical tourists who seek the latest innovations and advancements in healthcare.

Internationally Accredited Hospitals: The escalating count of globally accredited hospitals in Türkiye guarantees the provision of healthcare services adhering to universally recognized standards, thus nurturing confidence and reliance among health tourists.

Halal-Certified Offerings: With a commitment to meeting the needs of Muslim patients, Türkiye provides a comprehensive range of halal-certified services, encompassing food, amenities, and prayer facilities, ensuring heightened comfort and contentment for health tourists.

Synergy with Other Tourism Domains: Capitalizing on its rich historical legacy, cultural diversity, and breath-taking natural landscapes, Türkiye provides an alluring backdrop for health tourists to seamlessly blend medical treatments with leisure pursuits, facilitating a well-rounded and immersive experience.

iii. Investment Opportunities

In an endeavour to fortify health tourism, Türkiye has undertaken a series of strategic investments and initiatives, driven by governmental support and collaborative efforts that also make it an attractive destination for investors.

Governmental Support and Incentives: Health institutions and enterprises with an International Health Tourism Authorization Certificate are recipients of Ministry of Commerce-sponsored support. These incentives encompass advertising, international promotion and marketing, provision of airline tickets for patients arriving in Türkiye, agency commissions, call center staff recruitment, overseas unit rental fees, participation in events like fairs and symposiums, trademark registration, protection expenses, and activities related to international certification (Bağcı, 2022).

USHAŞ (International Health Services Inc.): Established in 2018 by the public sector, USHAŞ serves as a catalyst for international health services. It coordinates and bolsters activities of both public and private sectors, offers recommendations to the Ministry concerning international health services, and contributes to the formulation of policies, strategies, service standards, and accreditation criteria. USHAŞ facilitates the information dissemination to health tourists seeking medical care in Türkiye, providing services like airport pickup, translation, transfer, proper routing to healthcare providers, appointment scheduling, preliminary examinations, and medical second opinions. Initiatives like the HealthTürkiye Portal and the International Patient Tracking System underscore its digital endeavours.

International Collaborations: Türkiye has established crucial international agreements, including an International Patient Protocol with the Nigerian Embassy, a Patient Transfer Agreement with the General Directorate of Gabon Port Operations, and a Cooperation Agreement with Balalar Qo'llab Quvvatlash Markazi (Children's Foundation). Collaborations regarding drugs, medical devices, and medical supplies have been formed with the Ministry of Health of the Republic of Sudan. Additionally, significant events like the AZMEDICA Azerbaijan-Türkiye Health Business Forum and Fair in Baku, as well as the PAKMEDICA Medical, Health, Cosmetics Forum and Fair in Pakistan, were organized in 2022 (USHAŞ, 2023).

City Hospitals: A recent milestone in Türkiye's health sector is the implementation of the city hospitals project. These extensive healthcare complexes, dispersed across various regions, provide an array of health services with cutting-edge technology. They collaborate with USHAŞ to cater to health tourism patients. Operating under the build-operate-transfer model, there are presently 20 city hospitals in 18 cities, collectively offering 28,564 beds, with 13 hospitals in the construction phase (Ministry of Health, 2023).

Istanbul Airport: This brand-new airport, operational since 2019, accommodates 86 airlines that serve 309 destinations. Istanbul Airport ranked seventh globally with 64.3 million passengers in 2022,

showcasing a remarkable 73.8% increase, and is fifth in terms of international passengers with 48.5 million (ACI, 2023). Turkish Airlines' extended reach due to the new airport has positively impacted health tourism by boosting arrivals from regions like Africa, South America, and the Far East.



Photo: A view from AZMEDICA B2B Event in Baku

Overseas Expansion: Health institutions within Türkiye have exhibited an accelerated proclivity towards expanding their presence within foreign markets, a strategic manoeuvre intended to enhance patient acquisition endeavours. A notable exemplar in this context is the Medipol Health Group, a vanguard entity within the healthcare domain, which has inaugurated medical facilities across 10 distinct countries, encompassing locales like Azerbaijan, Russia, Germany, and England. In a similar direction, the Acibadem Group has undertaken a comprehensive internationalization strategy, disseminating its medical units across a substantial 29 countries, encompassing not only territories with varying geopolitical characteristics such as Kyrgyzstan, Cameroon, and Ethiopia, but also extending its reach to encompass western nations like Germany and England. Beyond these conglomerates, specialized service providers like Cliniccenter (specializing in Hair Transplantation), Dentakay (focusing on Dental services), and Bahçeci (pioneering in IVF treatments) have further expanded their purview, establishing clinics and representative enclaves in foreign locales. This pronounced trend of internationalization underscores the strategic pursuit of enhanced medical outreach on a global scale, signalling a seminal development in the evolution of Türkiye's healthcare sector.

iv. Investment Incentives

Türkiye offers various incentives to foreign investors across multiple sectors. These incentives primarily include exemptions and support mechanisms such as Value Added Tax (VAT) exemption, customs duty waiver, tax deductions, social security premium support for both employees and employers, income tax withholding reductions, interest rate subsidies, land allocation, VAT refunds, and Research and Development (R&D) incentives.

Under the VAT exemption, machinery and equipment purchased domestically or internationally within the scope of an investment incentive certificate are exempt from paying VAT. Similarly, for machinery and equipment acquired from abroad, customs duties are waived when operating under an investment incentive certificate. Tax deductions are calculated based on the investment contribution ratio until the total reduced tax amount equals the investment contribution ratio, which represents

the taxable portion of the total fixed investment amount. Additionally, Türkiye provides social security premium support for labour costs, covering the legal minimum wage amount for newly created jobs resulting from investments under the investment incentive certificate. This support has no upper limit and extends for a period of ten years. The state also covers the employer's portion of social security premiums for these new jobs. Income tax withholding is reduced for additional employment generated by investments, with no specified upper limit and a ten-year duration.

Furthermore, Türkiye offers interest rate subsidies for investment loans with a minimum maturity of one year. These subsidies cover a portion of the interest or profit share payments on loans used for up to 70% of the registered fixed investment amount specified in the investment incentive certificate for the first five years. Land allocation is possible, subject to availability, based on the regulations of the Ministry of Finance, for qualifying investments. For strategic investments exceeding a minimum fixed investment amount of 500 million Turkish Lira, the collected VAT on building and construction expenses is refunded. Moreover, specific incentives are provided for research and development activities, where a minimum of 15 employees for R&D centers and 10 employees for design centers are required. These incentives, valid until 2024, include full deduction of R&D expenses from the tax base, exemption from stamp duty for related documents, and waiver of customs duties on products imported for R&D projects. In summary, Türkiye's comprehensive investment support framework covers various aspects of financial, tax, and operational incentives to attract foreign investors and foster economic growth. (Invest in Türkiye, 2023)

v. Lessons Learned

Türkiye has emerged as a prominent destination in the realm of health tourism, capitalizing on a confluence of factors that set it apart. Geographical and cultural proximity to Europe, coupled with the pressing issue of inadequate healthcare resources to cater to the growing elderly population in the continent, has positioned Türkiye as a frontrunner. The escalating waiting times for medical procedures in many European countries have paved the way for Türkiye to offer efficient and quality medical services, thus addressing a critical need. Moreover, the provision of Halal services tailored to the requirements of the Muslim population demonstrates Türkiye's commitment to inclusivity and cultural sensitivity, making it an attractive destination for a wide range of visitors seeking healthcare services. Beyond just medical facilities, Türkiye's robust tourism infrastructure further bolsters its appeal, promising a holistic experience for patients and their accompanying family members. The growing international recognition of Türkiye's prowess in health tourism is a testament to its dedication to excellence and is a valuable lesson for other countries seeking to tap into this burgeoning industry.

In light of Türkiye's remarkable success in health tourism, several essential lessons emerge for nations aiming to replicate its achievements. Firstly, recognizing the potential of aligning geographic and cultural proximity with healthcare needs can offer a strategic advantage. Addressing the challenge of meeting healthcare demands in neighbouring regions can lead to mutually beneficial outcomes, stimulating economic growth while simultaneously providing much-needed medical relief. Secondly, the importance of efficiency cannot be overstated. By investing in infrastructure and optimizing resource allocation, nations can markedly enhance their appeal to health tourists. Thirdly, Türkiye's demonstration of cultural inclusivity, such as offering Halal services, highlights the significance of tailoring healthcare offerings to diverse populations. This practice fosters goodwill and facilitates a sense of belonging, contributing to a positive patient experience. Lastly, the success of Türkiye

underscores the interplay between healthcare and tourism infrastructure. Enriching the overall journey for patients and their companions with accessible accommodations, transportation, and recreational activities can elevate a country's health tourism proposition, ultimately attracting a broader demographic of visitors.

5.1.5 Tunisia

i. Current Situation

Situated as the northernmost African nation, Tunisia shares borders with Algeria, Libya, and the Mediterranean Sea. Encompassing an area of 165,000 square kilometres and home to a population slightly exceeding 11.78 million, Tunisia boasts over 1200 kilometres of coastline on its northern and eastern flanks. Its unique geographical features encompass desert expanses and oases to the west, granting it a temperate Mediterranean climate. Flaunting more than 30,000 archaeological sites scattered across its landscape, the country offers a diverse range of options for tourism. While it occupies a smaller portion of the Atlas Mountain range, Tunisia's allure as a premier tourist destination stems from its perpetual sunshine and inviting sandy beaches. The southern region embraces the vast expanse of the Sahara Desert, with fertile pockets dispersed throughout the remainder of the land (Medical Tourism, 2023).

The Tunisian economy finds tourism to be a pivotal component, infusing essential foreign currency. This sector significantly influences the domestic market, contributing approximately 8% to the GDP. Moreover, it serves as a source of employment for an estimated 400,000 individuals, of which roughly 85,000 are engaged directly. Notably, employment figures exhibit a pronounced seasonal bias (Oxford Business Group, 2019). Tunisia witnessed a peak of 9.5 million visitors in 2019 and then confronted the impact of the Covid-19 pandemic like all countries. Consequently, the tourist count dwindled by 2 million in 2020. The gradual recovery from the pandemic is underway and the country hosted 6.5 million tourists in 2022. Concurrently, tourism revenue for the same year amounted to \$1.7 billion (UNWTO Tourism Dashboard).

Analysing the tourist influx based on their countries of origin, proximate nations assume the lead. Algeria holds the top spot, accounting for 2.7 million visitors in 2018, constituting 39% of the total. In second place, Libya contributes 22% to the mix. From the European continent, major sources of tourists include Germany, Belgium, France, and the United Kingdom. The heightened arrival of tourists corresponds with a surge in overnight stays, as non-resident hotel reservations witnessed a 30% upswing (Oxford Business Group, 2019).

ii. Strengths of Tunisia in Health Tourism

Strategically located and known for its accessible healthcare system, Tunisia is a sought-after medical destination in the region. About 500,000 foreign patients seek inpatient care annually, and 2 million to 2.5 million use outpatient services. Popular treatments include cosmetic surgery, dental procedures, cardiology, orthopaedics, and more. Many patients come from neighbouring Libya and Algeria, and the country's reputation benefits from its proximity to European and Arab markets. Tunisia is also a preferred spot for Europeans seeking cosmetic surgery (Oxford Business Group, 2019).

Tunisia's healthcare system consists of public, private, and public-private sectors with various levels of care. The public sector accounts for 79% of hospital capacity, managed by the Ministry of Health and the Central Pharmacy of Tunisia. There are extensive health centers in both sectors, and hospital

capacity grew from 25,830 in 2016 to 26,715 in 2017. The nation's skilled medical workforce comprises 14,896 doctors, with a doctor-to-population ratio of 130 per 100,000 inhabitants.

According to a Global Wellness Institute (GWI) report, Tunisia hosted 577,300 wellness tourists in 2017, spending \$313.8 million. Wellness travellers in the region spend 44% more on average than typical tourists. Hot springs and seawater treatments are popular, and Tunisia's legislative framework ensures high wellness standards. Plans are underway to privatize thermal centers and establish 54 new facilities by 2020 to tap into the growing wellness market.

Tunisia's achievement in the field of health tourism is the result of several important factors that are:

Quality Healthcare: The Tunisian government invests significantly in upholding high medical facility standards for international patients. Hospitals offer comprehensive facilities and advanced technology procedures performed by experienced medical professionals.

Advanced Hospitals: Tunisia's healthcare system encompasses both public and private sectors. Well-equipped hospitals across the country boast the latest technologies and equipment. These facilities deliver cost-effective medical treatments, with physicians trained in Europe and America, ensuring top-tier patient care.

Wellness and Rehabilitation: Beyond medical procedures, Tunisia provides wellness and rehabilitation programs that capitalize on its diverse natural landscapes. Coastal areas like Hammamet and Sousse are sought-after spots for spa treatments and thalassotherapy. The Sahara Desert offers a unique setting for wellness retreats and holistic therapies, promoting a holistic approach to health.

Affordable Medical Treatments: Tunisia offers medical treatments, particularly cosmetic surgeries, at 40-50% lower costs compared to Europe. For instance, a facelift surgery in the USA costs around \$8,000-9,000, while the same procedure in Tunisia is priced at approximately \$3,000-3,500.

Touristic Attractions: Tunisia boasts numerous captivating tourist sites, including vibrant medinas, UNESCO World Heritage Sites, and local traditions. This enriches the health tourism experience, allowing visitors to explore places like El Djem Amphitheater, The National Bardo Museum, Sidi Bou Said, Grand Erg Oriental, and Sousse Medina after their treatments.

Specialized Procedures: Tunisia is renowned for its specialized medical procedures, attracting medical tourists seeking cosmetic and plastic surgery, dental procedures, ophthalmology, fertility treatments, and orthopaedic surgeries. These treatments are offered at a fraction of the cost compared to other countries, without compromising quality.

Accessibility and Connectivity: Positioned strategically in North Africa, Tunisia enjoys easy accessibility for visitors from Europe, the Middle East, and beyond. Well-connected airports and modern transportation networks facilitate seamless travel for health tourists seeking medical treatments or wellness experiences.

iii. Investment Opportunities

In Tunisia's vibrant tourism scene, a new wave of health tourism is taking place. This shift is driven by creative ideas, smart investments, and teamwork. This transformation is marked by visionary projects, tech progress, and partnerships. It does not only help improving Tunisia's competitiveness in health

tourism but also highlights its dedication to top-notch healthcare and well-being. These efforts show how Tunisia is using its strengths to welcome medical tourists and those looking for holistic wellness.

Tunisia Economic City: At the forefront of Tunisia's health tourism transformation is the visionary Tunisia Economic City project. Situated in Enfedha, this project aims to create a comprehensive modern city that intertwines culture, education, tourism, and commerce. This metropolis is envisaged as a pivotal hub connecting diverse regions of the world for economic, educational, and cultural exchange. A cornerstone of this initiative is the Healthcare City, designed to introduce cutting-edge medical practices from across the globe and standardize Tunisia's health sector to unprecedented international standards (Tunisiaec, 2023).

E-Health Solutions: Embracing the digital era, Tunisia is embracing e-health solutions to expand healthcare accessibility. A collaboration with the French Development Agency underscores this commitment, facilitating the implementation of a digital information system encompassing electronic medical records, digital archives, and digital medicines distribution. This digital transformation is set to enhance medical services and streamline healthcare processes, catering to both domestic and international patients. The incorporation of telemedicine further underscores Tunisia's focus on leveraging technology to revolutionize healthcare accessibility (European Commission, 2023).

Open Sky Agreement: Recognizing the economic significance of aviation relations, Tunisia's Open Sky Agreement with the European Union augments its status as an essential partner in the Mediterranean aviation landscape. This comprehensive agreement paves the way for increased direct flights, fostering heightened trade and tourist flows between Tunisia and the EU (Oxford Business Group, 2019).

Quality Tourism Tunisia: Enhancing visitor experiences, Tunisia introduced the "Quality Tourism Tunisia" label, an emblem of superior service and commitment. By upholding specific criteria, including courteous reception, clear information provision, unique experiences, and competent teams, this initiative raises the bar for hospitality stakeholders across sectors (Autre Tunisie, 2023).

Tunisia Health Alliance: Collaboration forms the bedrock of Tunisia's health tourism growth, characterized by the Tunisia Health Alliance. This alliance of 15 healthcare companies seeks to extend a comprehensive and high-quality healthcare proposition to African markets. Comprising clinics, medical assistance, device companies, and pharmaceutical industries, this collective aims to become a key stakeholder on regional and international scales. By forging strong and sustainable relationships, the alliance endeavours to address the diverse needs of healthcare practitioners and patients alike (Tunisia Health Alliance, 2023).

iv. Investment Incentives

The Tunisian economy has undergone significant changes in recent years, characterized by a growing emphasis on liberalization, increased integration into the global economy, and improved competitiveness. These transformations have been accompanied by the introduction of a new regulatory and tax incentive framework designed to attract foreign investment. The central element of this framework is the Investment Law, which came into effect on April 1, 2017, and offers a wide range of benefits to investors.

Under the new Investment Law, foreign companies enjoy substantial privileges, including the ability to have full ownership in offshore ventures. Additionally, there is a simplified authorization process,

greater ease of acquiring land for investment purposes, and strong investor protections in line with international standards on fair and equitable treatment and intellectual property rights. The law also facilitates the transfer of funds abroad, including profits, dividends, and assets. Foreign executives can be easily employed, allowing up to 30% during the initial three years through a simple declaration, and 10% thereafter, with a minimum of four foreign executives in all cases.

Moreover, the law provides financial and tax incentives to promote investment. This includes reducing income tax rates to 10% for companies engaged in total exports. There is a complete exemption from Value Added Tax (VAT) and customs duties on inputs used for products destined for re-export. Companies operating in regional development zones may benefit from a total tax exemption on profits for up to 10 years, along with specific investment grants available to cover up to 30% of investment costs, capped at 3 million Tunisian dinars. Additional incentives encompass support for priority sectors, value chains, economic yield grants for intangible investments, research and development expenses, as well as subsidies for employers' contributions to mandatory schemes and expenses related to training programs leading to certification.

The law establishes two categories of regional development zones for industrial, craft, and service sector investments. Each zone offers distinct incentives, with the second group being particularly advantageous for investors. Financial benefits in the form of subsidies, including revolving capital up to 10% of the project cost, can range from 15% to 30%. Businesses operating in these zones may deduct 100% of their generated revenues or profits during the first ten years of operation, with a 10% deduction thereafter. Additionally, there is full coverage of the employer's contribution to the social security legal scheme for a period of 5 to 10 years. (Invest in Tunisia)

v. Lessons Learned

In light of these innovative ventures, Tunisia's health tourism sector is undergoing a remarkable transformation, where strategic planning, technological integration, and cross-sector collaboration converge to create an environment that caters to diverse healthcare needs and wellness aspirations. Tunisia has already identified health tourism a niche market to invest in and to become an attractive destination in the region. The government has designed policies and projects to support the position of the country as a regional health tourism centre and paved way for effective collaboration.

Beyond medical tourism, Tunisia is a wellness haven. Its Mediterranean climate, aromatic flora, and water therapies like thalassotherapy attract visitors. The country ranks second globally for thalassotherapy, with around sixty centers along its coast. Hotels offer various wellness treatments, including thalasso centers and luxury spas (Discover Tunisia, 2023). Foreign investment in wellness, exemplified by a partnership between the Tunisian Sovereign Wealth Fund and Dogan Geothermal Group, is shaping this sector (AA, 2019). In this respect, Tunisia has not only limited its journey in health tourism only with medical tourism but also has exerted efforts to unleash its potential in wellness tourism.

5.1.6 Malaysia

i. Current Situation

Malaysia, located in Southeast Asia, is celebrated for its stunning natural landscapes. With temperatures averaging between 30-35 degrees Celsius, the country boasts a coastline spanning 4,600 kilometres, dotted with 878 islands. Many of these islands remain untouched, adorned by ancient

rainforests dating back 130 million years. The nation's attractions include majestic waterfalls, serene lakes, meandering river tributaries, rolling highlands, and awe-inspiring mountain ranges.

Rapidly emerging as a prominent health tourism destination, Malaysia is renowned for offering top-notch medical care at affordable rates. From 2015 to 2017 and in 2019, the country earned the title of the "Best Country in the World for Healthcare" (COMCEC, 2020). Malaysia has effectively implemented programs and policies in its healthcare sector, positioning itself as a global leader in health tourism. Bolstered by governmental efforts in financing, legislation, and health tourism promotion, the country aspires to become a hub for the Asian region. Government support, coupled with enhanced healthcare services, has facilitated the growth of hospital revenues and the number of health tourists.

In the year 2022, Malaysia extended a warm welcome to more than 850,000 patients, generating a revenue exceeding MYR 1.3 billion (\$280 million). The most sought-after medical procedures in the country include cardiac and orthopaedic surgeries, fertility treatments, dental procedures, and cosmetic surgery. Notably, patients predominantly arrive from neighbouring countries in the Far East such as China, Japan, Indonesia, the Philippines, and Singapore. Additionally, Malaysia attracts patients from distant locations, including the United States and the United Kingdom (MHTC, 2023). The country boasts over 100 private healthcare institutions dedicated to providing exceptional health tourism experiences. In 2021, Malaysia had around 146 government hospitals and 209 licensed private hospitals, complemented by 1,057 health clinics offering private services (Statista).

Within the realm of wellness tourism, Malaysia achieved significant milestones. The Global Wellness Institute's 2020 Report revealed that wellness travellers undertook 7.5 million trips, contributing to a total of \$ 3.5 billion in revenue for Malaysia in the same year. This accomplishment positioned Malaysia as one of the top 20 destinations globally.

Regulation and legislation of health tourism in Malaysia are overseen by two key authorities: the Ministry of Health (MOH) and the Ministry of Tourism (MOT). The Ministry of Health is dedicated to facilitating universal access to high-quality and affordable healthcare services across the country's network of hospitals and clinics. Malaysia operates a dual healthcare system, encompassing both the public and private sectors. To foster greater private sector engagement in the healthcare system, the Malaysia Healthcare Travel Council (MHTC) supports public-private partnerships under the Ministry of Health. This approach helps strike a balance between public and private stakeholders (Medical Tourism Journal, 2018).

ii. Malaysia's Strengths in Health Tourism

Malaysia has swiftly ascended the ranks as a preferred destination for health tourism, offering a blend of compelling features that cater to international patients seeking medical care. With its exceptional blend of factors ranging from highly skilled medical professionals to modern facilities and scenic attractions, Malaysia's appeal in the realm of health tourism is truly distinctive.

Skilled Medical Professionals: Malaysia boasts an extensive and proficient medical workforce, with a substantial number of experts who have gained their training in Western nations. In 2021, there were more than 77 thousand registered doctors in Malaysia. The country currently ranks tenth within the average number of physicians per one thousand inhabitants in Asia, with 1.66 physicians per one thousand inhabitants (Statista, 2023).

High Quality Facilities: The country maintains an exceptional standard of medical care, illustrated by its possession of 18 Joint Commission International (JCI) accredited establishments. Additionally, Malaysia adopts globally acknowledged independent accreditation mechanisms, such as the Global Healthcare Accreditation (GHA) Program and the Malaysian Society for Quality in Health (MSQH).

Cost-effectiveness: A defining feature of Malaysia's health tourism appeal is its affordability. Medical expenses in the country are notably lower compared to those in various developed nations. This affordability, coupled with access to experienced and qualified medical practitioners without enduring lengthy wait times, serves as a magnet for international patients. Opting for medical care in Malaysia can result in savings of 65-80 % in comparison to countries like the US and many European countries.

Wellness Opportunities: Malaysia possesses a diverse legacy of traditional medicine and wellness traditions, encompassing practices like acupuncture, yoga, and meditation. The nation's natural landscape, comprising rainforests, beaches, and mountains, offers an ideal backdrop for immersive wellness retreats. Moreover, Malaysia's affordability enhances its appeal, delivering excellent value for money to wellness seekers.

Natural Surroundings: Beyond health services, Malaysia offers an alluring environment for tourists. With a wealth of over 1000 islands, numerous marine parks, and untouched primeval rainforests teeming with diverse avian and wildlife species, the country ensures an enchanting experience. Its pristine beaches, scenic mountains, hotels, and vibrant shopping centres collectively contribute to Malaysia's status as a rapidly burgeoning destination in Southeast Asia.

Global Halal Centre: Malaysia strategically caters to tourists, including health tourists, from Muslim populations like the East Asian and GCC countries. Tailored services, including halal hotels, halal food provisions and dedicated prayer spaces, along with halal medical treatments (such as bovine-derived insulin instead of porcine-based insulin), draw religiously mindful health tourists. (COMCEC, 2020)

iii. Investment Opportunities

There are several investment opportunities in Malaysia in the nexus of health, wellbeing and tourism services.

Availability of Malaysia Healthcare Travel Council (MHTC): Malaysia has been proactively advancing its health tourism sector, MHTC established by Ministry of Health Malaysia (MOH) to promote the country's fledgling healthcare travel industry in 2005 and was launched as a formal entity in 2009. Functioning as a non-profit entity, the MHTC plays a pivotal role in showcasing Malaysia as a prime health tourism destination. MHTC is working in coordination with several stakeholders including government ministries and agencies, premier Malaysian private healthcare facilities, airline companies, travel agencies, hotels and many more. The services of MHTC are important for existing health service providers and prospective investors.

The Role of Malaysia Investment Development Authority (MIDA): Facilitating investments in private healthcare establishments is a key objective of the Malaysia Investment Development Authority (MIDA). This involves active engagement with stakeholders like the Malaysia Healthcare Tourism Council (MHTC), Ministry of Health (MOH), Malaysia Productivity Corporation (MPC), and Ministry of Finance (MOF). MIDA's endeavours include incentivizing healthcare investment through schemes such as the Investment Tax Allowance, offering income tax exemption equivalent to 100 % of qualifying

expenditure over a five-year span for companies establishing or upgrading healthcare facilities to bolster medical travel.

MHTC – Air Asia Partnership: A notable partnership between MHTC and Air Asia Indonesia has been recently forged. This collaboration aims to position Penang as a premier health tourism destination, with Air Asia serving as the official airline for direct travel. The CEO of MHTC highlighted that Penang's prominence, attracting about 60 % of health tourists and generating over \$ 120 million from health tourism in 2017. The alliance seeks to expand Penang's health tourism market by facilitating medical trips, including airport transfers, for Indonesian patients.

Kuala Lumpur Wellness City (KLWC): The inauguration of Kuala Lumpur Wellness City (KLWC) in June 2023 marks a ground-breaking step. KLWC, a purpose-built township in Southeast Asia, is dedicated to weaving healthcare and wellness into its way of life. Spanning 26.5 acres with a gross development value of MYR 11 billion, KLWC envisions a comprehensive wellness hub that encompasses medical care, health, fitness, and business, alongside residential, retail, and commercial domains. KLWC features elements like The Nobel Healthcare Park, KL International Hospital (KLIH), innovation laboratories, clinical R&D facilities, office towers, retirement resorts, Healthcare Hub, wellness-centric serviced apartments, and a Central Park. The first phase of KLWC is actively constructing KLIH and The Nobel Healthcare Park, scheduled for inauguration in 2026.



Photo: A view from KL Wellness City (KLWC), Malaysia

iv. Investment Incentives

Malaysia has introduced a range of tax incentives aimed at promoting specific economic activities. These incentives often alleviate the tax burden on business transactions. Presently, Malaysia's corporate tax rate is capped at 25%, but eligible companies can significantly reduce their effective tax rates, sometimes down to just 7.5% with only 30% of their profits subject to taxation. This exemplifies how companies can benefit from the incentives provided by the Malaysian government, encouraging economic growth and development.

Entrepreneurs and businesses in Malaysia have been quick to seize the opportunities presented by these tax incentives, incorporating them into their business and investment strategies. A comprehensive understanding of these incentives has become crucial for companies looking to make informed investment decisions. Expert advice is often sought, as the availability of incentives can vary

depending on the company's structure. For instance, some incentives are exclusively accessible to private limited companies or publicly listed companies in Malaysia.

There are several specific tax incentives in Malaysia, including the Pioneer Status (PS), which offers partial tax exemptions for up to five years, with tax holders paying as little as 7.2% of their statutory income. The Malaysian Investment Development Authority (MIDA) determines the eligibility of products or activities for this incentive. Another option is the Investment Tax Allowance (ITA), designed for companies with substantial capital investments that may not yield quick returns. ITA provides a tax relief period of 5 to 10 years, with a standard rate of 60% on qualifying capital expenditure, offsettable against 70% of statutory incomes. Additionally, the Reinvestment Allowance (RA) is available to companies operating in Malaysia for at least twelve months and incurring capital expenditure on qualifying projects. It offers a reinvestment allowance equal to 60% of that expenditure, with specific exclusions defined by the Income Tax Act of 1967. These incentives collectively encourage investment, innovation, and economic expansion in Malaysia. (MIDA, 2023)

v. Lessons Learned

Drawing valuable insights from its journey, Malaysia is strategically positioned to sustain and amplify its health tourism sector in the coming years. The nation possesses several favourable attributes, including a skilled medical workforce, state-of-the-art medical facilities, cost-effective medical services, and a hospitable ambiance. Bolstered by substantial governmental investments, the commitment to fostering health tourism remains resolute. Through continued infusion of resources and promotional efforts, Malaysia is primed to ascend as a premier global health tourism hub.

A pivotal underpinning of Malaysia's triumph is the robust synergy between the public and private sectors. The exemplary success of the MHTC underscores the effectiveness of such partnerships in elevating Malaysia's position as a sought-after health tourism destination. Additionally, a salient takeaway is the significance of niche market focus. Malaysia's triumph in attracting health tourists for specialized procedures like cardiac and orthopaedic surgeries, along with cancer treatments, is noteworthy. Presently, the government's focus lies in cultivating diverse niche markets like medical spas and wellness tourism to further diversify the country's health tourism portfolio.

Concluding Remarks

An overview of the state of health tourism in six members of the OIC demonstrated the availability of a wide range health tourism services and investment opportunities guided by government policies. The potential for health tourism within the OIC region is considerable, propelled by factors such as convenience, cost efficiency, the global Halal market, demographic aging, local hubs, exceptional medical treatments, and wellness alternatives. These merits establish a strong foundation upon which OIC countries can tap into the burgeoning global health tourism sector.

Nevertheless, numerous obstacles and drawbacks also necessitate attention. In some OIC countries inadequate healthcare infrastructure, limited economic advancement, and tourism offerings have the potential to limit development of health tourism. Financial limitations concerning investment might impede the establishment of contemporary medical facilities. Underinvestment in marketing and promotion in health tourism also could limit the chance of developing strong marketing campaigns that is essential for attracting international patients (tourists).

To seize the opportunities while mitigating challenges, the following policy implications could be considered by policymakers:

- **Collaborative Networking:** Foster cooperation and dissemination of knowledge among OIC countries to collectively tackle challenges, exchange exemplary approaches, and augment overall healthcare and tourism infrastructures.
- **Standardization and Certification:** Forge standardized healthcare service protocols and facility certifications to assure quality and safety, especially pertinent within the global Halal market context.
- **Investment Incentives:** Institute financial stimuli, grants, and alliances to expedite investments in healthcare infrastructure, enabling member countries to enhance medical facilities and services.
- **Promotion and Branding:** Jointly endorse the OIC region as an integrated health and wellness retreat, underscoring its diverse cultural, historical, and natural attractions alongside healthcare offerings.
- **Capacity Enhancement:** Allocate resources for the training and education of healthcare practitioners to sustain and elevate service quality, as well as cultivate a skilled workforce tailored for the burgeoning health tourism sector.
- **Public-Private Partnerships:** Facilitate alliances between governmental bodies, private healthcare providers, and stakeholders within the tourism sector to forge a symbiotic relationship that propels sustainable growth within the health tourism domain.
- **Data Compilation and Analysis:** Institute a centralized mechanism for collecting data concerning health tourism trends, patient input, and economic repercussions. This data can guide judicious, evidence-driven policy resolutions and strategic planning.

By benefiting from these suggestions, OIC countries can harness the merits of health tourism while contending with related challenges. A concerted endeavour towards nurturing a flourishing health tourism sector will not only contribute to the economic advancement but also stimulate cross-cultural comprehension and harmony in the OIC regio

Conclusion

CONCLUSION

In summary, this report has provided a comprehensive exploration of health tourism not only within the member countries of the Organization of Islamic Cooperation (OIC) but also globally. It investigated in five key aspects, collectively shedding light on the critical role health tourism can play today.

The analysis commenced by establishing a foundational understanding of health tourism. This entailed defining key terms and highlighting the multifaceted factors influencing its trajectory. The study emphasized that health tourism encompasses not only medical treatments but also broader experiences, including cultural immersion, wellness programs, and spa services. Notably, the quality of healthcare services, the adequacy of infrastructure, and the regulatory framework emerged as significant determinants in shaping the health tourism landscape.

Subsequently, the research explored the present state of health tourism and its evolving trends. The sector has exhibited steady growth, with notable shifts toward specialized treatments, holistic wellness experiences, and comprehensive medical tourism packages. The rise of wellness and holistic health tourism represents a noteworthy transformation, one that OIC countries should closely monitor to remain competitive globally.

The investment ecosystem in health tourism was thoroughly investigated, emphasizing its indispensable role in fostering the sector's growth. By examining case studies from both OIC and non-OIC countries, the report revealed the substantial potential for attracting foreign direct investment in the health tourism sector. Creating an environment conducive to investment, including the formulation of robust legal and regulatory frameworks, stands as a pivotal factor in attracting investments and fostering sector expansion.

Furthermore, the study explored the digitalization of health tourism and its transformative impact. The integration of telemedicine, digital health records, and advanced online marketing strategies has streamlined the patient's journey and expanded the reach of health tourism services. The adoption of digitalization is imperative for OIC countries to maintain competitiveness and enhance accessibility on a global scale.

The investigation also included a review of experiences from select OIC countries in the realm of health tourism. These case studies, Malaysia, Mozambique, Qatar, Senegal, Tunisia and Türkiye, illuminated the substantial growth potential and the benefits of strategic planning and investment within this sector. OIC nations can draw valuable lessons from these successful paradigms in their pursuit of health tourism development.

In conclusion, health tourism represents a promising avenue for OIC countries to harness their tourism potential, boost their economies, and elevate healthcare service standards. By understanding key concepts, adapting to evolving trends, cultivating an investor-friendly environment, embracing digitalization, and drawing insights from successful case studies, OIC countries can position themselves as prominent destinations in the global health tourism landscape. The symbiotic relationship between healthcare and tourism promises a more prosperous future, wherein both patients and tourists can relish the rich tapestry of culture, natural beauty, and world-class healthcare services offered by OIC nations. Achieving this vision necessitates collaboration between governmental bodies, healthcare institutions, and private enterprises, ensuring the well-being and satisfaction of those seeking healthcare and experiences within the OIC region. With steadfast commitment, strategic foresight, and innovative approaches, the prospects for health tourism in OIC countries appear promising.

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PART II: GASTRONOMY TOURISM



Introduction

Tourism has become an important sector of the global economy, contributing to job creation, income generation, and economic growth. The Organisation of Islamic Cooperation (OIC) countries are home to diverse cultures, traditions, and cuisines, making them attractive destinations for tourists worldwide. In recent years, there has been a growing trend of tourists seeking unique and authentic culinary experiences, which has led to the emergence of gastronomy tourism.

Gastronomy tourism is a type of tourism that involves travellers seeking unique and authentic food and drink experiences⁷. It encompasses various activities, including food, cooking classes, and visits to local markets and food festivals (Henderson, 2009). Gastronomy tourism has become increasingly popular as more people are interested in exploring different cuisines and learning about local food traditions (Hsu et al., 2022).

The second part of the report focuses on gastronomy tourism and provides a candid discussion on key concepts, issues and challenges, digital solutions, investment opportunities, and selected six country case studies.

The OIC countries are home to some of the world's most diverse and flavourful cuisines, making them ideal destinations for gastronomy tourism. Each country has unique food traditions influenced by geography, history, and religion. For example, Turkish cuisine is heavily influenced by Ottoman cuisine, which incorporates elements of Central Asian, Middle Eastern, and Mediterranean cuisines. On the other hand, Moroccan cuisine is heavily influenced by Berber, Arab, and Mediterranean cuisines. It is known for its use of cumin, paprika, and saffron. In addition to cultural and culinary experiences, gastronomy tourism can contribute to local economies by creating jobs and generating income for local communities. For example, local farmers, artisans, and food producers can benefit from increased product and service demand. Restaurants, cafes, and food markets can also benefit from increased visitors and turnover.

However, there are also challenges to developing gastronomy tourism in OIC countries. One of the main challenges is the inadequate infrastructure and limited support for developing the tourism sector. Many OIC countries have underdeveloped transport networks, limited accommodation capacity, and issues with the quality of tourism services, making it difficult for tourists to access and enjoy local food and drink experiences. In addition, there may be limited awareness and understanding of the potential of gastronomy tourism among local communities.

⁷ The terms “gastronomy tourism” and “culinary tourism” are used interchangeably in the literature and in this report.

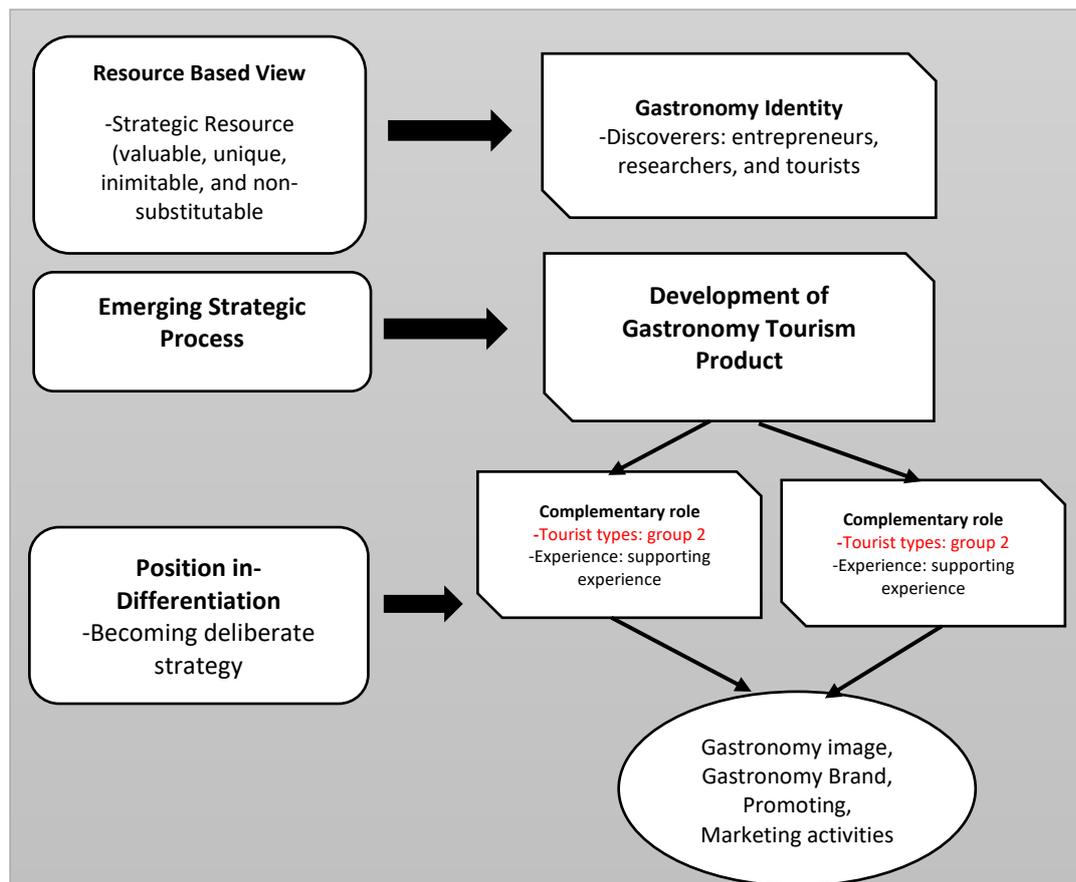
Chapter 6

6. UNDERSTANDING KEY CONCEPTS IN GASTRONOMY TOURISM

Chapter 6 of the report focuses on gastronomy tourism, exploring its definition, importance, market size, and emerging drivers of supply and demand. Gastronomy tourism involves travel to experience unique culinary offerings and understand local cultures. Factors such as consumer behaviour, technological advancements, and industry trends drive demand and supply in this sector. New developments explore how local culture and gastronomy are intertwined to create immersive experiences.

Gastronomy tourism, known as food tourism, focuses on experiencing and exploring a particular region's cuisines and beverages. It involves consuming, appreciating, and understanding local food culture, history, and traditions. The concept of gastronomy tourism has gained considerable attention in recent years. It has become an important growth driver in the tourism industry worldwide and in several OIC countries.

Figure 4: Strategic Role of Gastronomy in Destinations



Source: Seyitoğlu & Ivanovb, 2020

The strategic role of gastronomy in destinations is significant in several ways. Gastronomy, which refers to a region's culinary traditions, local food and beverage offerings, and dining experiences, can serve as a valuable and unique resource for a destination. Its characteristics are difficult to imitate or

substitute, making it an inimitable and non-substitutable asset. By using gastronomy as a strategic resource, destinations can differentiate themselves from competitors and create a distinct identity. This can attract various stakeholders, including investors, entrepreneurs, researchers, and tourists, who play a crucial role in discovering and developing gastronomy. In addition, gastronomy tourism products can be developed that combine unique culinary experiences with other complementary elements to enhance the overall tourist experience. In this way, specific tourist groups can be targeted and offered supporting experiences that enrich their visit. In addition, the promotion and marketing of the gastronomy image and brand can be used to showcase the destination's culinary offerings, attract tourists and stimulate economic growth through tourism-related activities (see Figure 4).

6.1 Definition, Importance, and Concept

Gastronomy tourism, or food tourism, is a rapidly growing niche in the travel industry. It involves traveling to a destination to experience and explore the local cuisine and food culture in an immersive way. Gastronomy tourism is about gaining a deep understanding of the local food culture by meeting the people behind the food, learning their stories, and experiencing the ambiance and atmosphere of where they live, cook and eat. It is a form of cultural tourism that enables visitors to gain a meaningful understanding of the destination's culture, identity, and history through the lens of food. The primary objective of gastronomy tourism is to provide an authentic, immersive, sensory experience that connects visitors to the place and the people behind the cuisine (Sánchez-Cañizares & López-Guzmán, 2012).

Gastronomy tourism, food tourism, and culinary tourism are terms often used interchangeably to describe the same concept within the travel industry. These terms refer to the practice of traveling to a destination specifically to explore and experience the local cuisine and food culture (Gheorghe et al., 2014). While there might be subtle variations in their usage, the fundamental idea behind all three terms remains the same. They all involve immersing oneself in the local food traditions, culinary techniques, and regional ingredients of a particular destination (Björk & Kauppinen-Räsänen, 2014). Through gastronomy, food, or culinary tourism, travellers seek to gain a deep understanding of the local food culture by engaging with the people behind the food, learning their stories, and experiencing the ambiance and atmosphere of where they live, cook, and eat (Sánchez-Cañizares & López-Guzmán, 2012). It further allows travellers to appreciate and celebrate the local food traditions, culinary techniques, regional ingredients, and the history behind the local cuisine (Björk & Kauppinen-Räsänen, 2014; Hall & Mitchell, 2007).

Gastronomy, food tourism, and culinary tourism are terms often used interchangeably to describe the travel experience centered around food and culinary traditions (Gheorghe et al., 2014). While there might be subtle differences in emphasis or scope, they generally refer to the same concept of traveling to explore and appreciate a destination's local cuisine and food culture. Gastronomy tourism emphasizes the broader cultural aspects of food, including history, traditions, and regional ingredients (Liberato et al., 2020). Food tourism focuses on the experiential part of eating and enjoying local dishes, while culinary tourism emphasizes culinary techniques, cooking methods, and chef-driven experiences (Björk & Kauppinen-Räsänen, 2014).

Food tourism is not limited to fine dining; it can also include street food, local markets, family-run restaurants, and local food festivals. The gastronomy tourist seeks to understand the food's origins and make meaningful connections with the place and people behind the cuisine (Everett & Slocum, 2013). They want to know why the food tastes like it does, based on the region's natural ingredients,

cultural influences, and historical events. The critical elements of food tourism include experiencing authentic local cuisine made from high-quality, locally sourced ingredients; engaging with the local community to understand the cultural significance of food; learning about the traditions and techniques behind regional cuisine; and connecting food to the natural landscape and history of the destination. For a gastronomy tourist, food serves as an entrance door to gain an insight into the soul of a place.

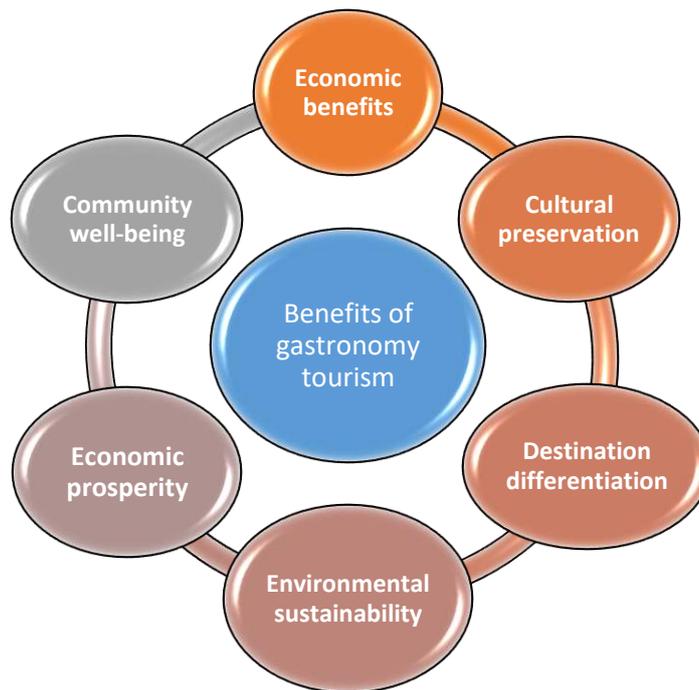
Gastronomy tourism has the potential to generate significant economic benefits for destinations by creating employment opportunities, stimulating local food production, and attracting visitors to lesser-known regions (Enzenbacher, 2020; Gheorghe et al., 2014). It can also promote sustainable tourism by encouraging visitors to support local businesses, reducing food waste, and promoting locally sourced ingredients (Camilleri, 2021; Perdomo, 2016).

The food cultures and cuisines of the OIC countries are incredibly diverse, representing a rich culinary heritage stretching from North Africa to Southeast Asia. Islamic traditions, historical influences, and local ingredients have shaped unique regional flavours and dishes throughout the Muslim world. Gastronomy tourism offers an opportunity to preserve this culinary diversity, promote cultural exchange, and support community development in OIC destinations (Pilcher, 2023).

The potential benefits of developing gastronomy tourism in OIC countries are enormous. It can help preserve local food traditions by encouraging the use of halal indigenous ingredients and the transmission of culinary knowledge between generations. It promotes agricultural heritage and biodiversity by highlighting traditional crops, livestock, and food production methods. It facilitates cultural preservation by sharing knowledge of Islamic food customs, Ramadan traditions, and religious festivals. Gastronomy tourism offers OIC communities' significant economic opportunities and prosperity (Ihsanoglu, 2009). It creates employment in food and tourism, especially for youth and women. It increases spending and income for small businesses such as local markets, food producers, chefs, and restaurants. It attracts foreign investment in food-related industries such as halal food, organic food, and food technologies (Fuste-Forne, 2021). It increases export potential by developing niche food destinations and food routes across the Muslim world.

Environmental sustainability is essential in Islam, and food tourism supports this goal too. It encourages using local, seasonal, and organic ingredients to reduce food miles, emissions, and waste (Addina & Santoso, 2020). It promotes sustainable food practices such as ethical food production, minimal packaging, and reuse of resources. It develops eco-friendly food tourism infrastructure using renewable energy, green spaces, and resource efficiency. Food tourism also enhances the well-being of OIC communities. It improves access to nutritious, halal, and affordable food, especially for vulnerable groups (Ma'rifah et al., 2019). It promotes social bonding through shared meals, culinary experiences, and food events. It contributes to active lifestyles by supporting walking tours, food trails, cooking classes, and festivals. It improves health and nutritional literacy by raising awareness of Islamic dietary guidelines and local superfoods (Said et al., 2023). In a nutshell, gastronomy tourism has become an increasingly important aspect of the tourism industry worldwide. It offers numerous benefits for the local economy, the tourism industry, and the wider community, as summarized in Graph 6.

Graph 6: Benefits of Gastronomy Tourism



Source: Giampiccoli et al., 2020; Hussin, 2018; Manola & Koufadakis, 2020; Scarpato, 2003; Sukenti, 2014

- ✓ **Economic benefits:** Gastronomy tourism can benefit the local community significantly. It can create employment opportunities and income for local businesses such as restaurants, markets, and food producers. Gastronomy tourism can also help to promote local agriculture, fisheries, and other food-related industries, thus supporting the local economy (Hussin, 2018).
- ✓ **Cultural preservation:** Gastronomy tourism can help preserve local food traditions and cultural heritage while passing on knowledge between generations. It can encourage transferring knowledge, skills, and techniques related to food preparation and production. Gastronomy tourism can also promote using traditional and local ingredients, thus preserving biodiversity and traditional knowledge (Sukenti, 2014).
- ✓ **Destination differentiation:** Gastronomy tourism can help to differentiate a destination from its competitors and offer a unique experience. It can attract new visitors and retain existing ones by developing a distinct food identity and appeal. Gastronomy tourism can also position a destination as a leading food destination in the global tourism market, increasing its visibility and competitiveness (Manola & Koufadakis, 2020).
- ✓ **Environmental sustainability:** Gastronomy tourism can promote environmental sustainability by encouraging the use of local and seasonal ingredients while reducing food miles and carbon footprints. It can support sustainable food production and consumption practices, conserving natural resources and reducing pollution (Scarpato, 2003).
- ✓ **Economic prosperity:** Gastronomy tourism drives tourism spending and generates revenue for businesses along the supply chain. It creates jobs, builds local tourism infrastructure, and boosts prosperity by stimulating demand and spending throughout the community (Manola & Koufadakis, 2020).
- ✓ **Community well-being:** Gastronomy tourism contributes to community well-being by encouraging social interaction, fostering community ties, and improving quality of life. It supports

local food producers and artisans and preserves the culinary heritage and cultural identity (Giampiccoli et al., 2020).

6.2 Market Size of Gastronomy Tourism

The gastronomy tourism market has been growing rapidly, driven by various factors, including the increasing popularity of culinary TV shows and food blogs, social media, and the increased interest in niche travel markets. According to a report by Allied Market Research, the global gastronomy tourism market was valued at \$1.2 trillion in 2019 and is expected to reach \$2.1 trillion by 2027, growing at a compound annual growth rate (CAGR) of 9.5% from 2020 to 2027. Regarding the regional market size, Europe is the largest market for gastronomy tourism, accounting for over 50% of the global market share in 2021. This is mainly due to Europe's rich culinary heritage, diverse food cultures across countries and regions, and high-quality artisanal food and drink products. Europe's tourism infrastructure also highly supports gastronomy experiences (Allied Market Research, 2021).

Asia Pacific comes second for gastronomy tourism, driven by the growing popularity of Asian cuisines, particularly in countries such as China, Japan, Thailand, Vietnam, India, and Indonesia. The Asia-Pacific market is expected to proliferate due to increasing consumer interest in authentic local cuisine, food tours, cooking schools, and farm-to-table experiences (Grand View Research, 2021).

North America is another significant market for food tourism, with the United States being the largest market in the region. The US food scene is diverse, with influences from immigrant communities, parts, and cultures. There is a growing interest in more urban food halls, food trucks, craft breweries, distilleries, farm-to-table restaurants, and food festivals (Euromonitor International, 2021; Grand View Research, 2021; ReportLinker, 2021).

Other factors driving market growth include the rise of food and travel media influencing consumers, foodie culture and engagement with food on social media, increasing health consciousness leading to an interest in local and organic food, and consumers seeking unique food experiences for social media bragging rights. While there are many opportunities, challenges remain regarding the seasonality of demand, perishability of products, skills and training shortages, and the need for strategic partnerships between tourism boards, farmers, food producers, and restaurateurs to develop food tourism infrastructure and promote destinations". The global food tourism market is poised for continued strong growth. Europe, Asia-Pacific, and North America remain the leading regional markets. However, new opportunities are emerging worldwide (Euromonitor International, 2021; Grand View Research, 2021; ReportLinker, 2021).

The 57 member states of the OIC encompass diverse cultures, landscapes, and cuisines ripe for gastronomy tourism. The food and beverage tourism market in OIC countries has the potential to be worth over \$260 billion. It is expected to reach \$500 billion by 2030, growing at an estimated CAGR of 10.5%. With diverse natural and cultural assets, OIC countries are well positioned to become leading gastronomy destinations, sharing traditional cuisines and rich food traditions with visitors in a culturally celebrated way (Organisation of Islamic Cooperation, 2020; Islamic Development Bank, 2021).

Promoting gastronomy tourism offers OIC countries an opportunity to stimulate economic growth, support food and agricultural industries and preserve cultural identity. Some OIC countries have already taken several initiatives to promote their culinary heritage through gastronomy tourism:

- Regional cuisines and locally sourced ingredients in destination marketing;
- Food trails, cooking classes, culinary tours, and festivals showcasing local dishes and food culture;
- Educational programs on traditional techniques, food history, and etiquette;
- Partnerships that support the local food system and expand economic opportunities.

Such efforts help to spread opportunities within tourism and beyond in many OIC Countries. With growing global interest in food tourism, OIC countries have an opportunity to boost tourism by promoting their culinary heritage. By addressing key challenges, investing in infrastructure, and improving service quality, OIC countries can tap into this market segment and sustain higher growth and employment in the coming years. OIC countries have significant potential for developing gastronomy tourism due to the diversity of their culinary heritage. However, further investment and improved tourism infrastructure and services are needed to realize this potential sustainably and generate more excellent economic value in all member countries.

A number of factors influence the experience of gastronomy tourists as shown in Figure 5.

Figure 5: Cultural Sensitivity in The Travel Experience



Source : Dancausa Millán, 2021 ; Kalenjuk et al., 2015 ; Richards, 2001 ; Rijal et al., 2021

Seasonality: Many destinations are highly seasonal, peaking during food festivals or harvests. This can lead to overcrowding, high prices, and under-utilization, especially in OIC countries with solid seasonal influences (Dancausa Millán, 2021).

Infrastructure and accessibility: Some destinations lack the infrastructure and transport to accommodate many people, especially in rural areas, making it difficult to access/experience local food/drink culture (Rijal et al., 2021). This poses a challenge to developing gastronomy tourism in different OIC regions.

Quality and authenticity: Maintaining the authenticity and quality of local food/drink products as gastronomy tourism grows risks the commodification/dilution of culture to meet tourist demands (Kalenjuk et al., 2015). This is an essential consideration for OIC countries seeking to promote cultural heritage through cuisine.

Health and safety: Ensuring the health/safety of travellers, particularly regarding foodborne illnesses/allergies, can be challenging as food safety standards/regulations vary between destinations (Rijal et al., 2021). This poses risks for travellers, including determining what is safe/hygienic in different OIC cultural contexts.

Cultural sensitivity: Experiencing/interacting with local food/drink cultures, which may differ from one's background, requires cultural sensitivity/understanding, particularly in respecting local

traditions/customs (Richards, 2001). This includes considerations of faith, modesty, and dietary restrictions among the diverse populations in OIC countries.

Paying utmost attention to these factors and preserving authenticity and offering good quality (standardized) services could support the development of gastronomy tourism in the OIC region. Developing new events, promotional campaigns could also help to attract more tourists even during off-season visitors.

- Seasonal management: Developing new events, promotions, and accommodation offers to attract off-season visitors.
- Infrastructure investment: Investing in transport and facilities to improve accessibility, including rural/less developed areas.
- Preserving authenticity: Protecting heritage through conservation efforts, certification, and partnerships with local communities.
- Health/safety standards: Establishing evidence-based best practices and clear guidelines/certifications to build trust without compromising culture.
- Cultural education: Providing resources/training for tourism stakeholders on cultural sensitivities, diversity, and inclusion.

When approached strategically, gastronomy tourism offers a unique opportunity to experience the diversity of OIC cuisines amidst cultural enrichment. Members can realize substantial and sustainable benefits by promoting authenticity, supporting communities, and celebrating diversity. There are significant opportunities and challenges for gastronomy tourism in OIC countries. A balanced, culturally sensitive approach is needed that capitalizes on opportunities while addressing seasonality, infrastructure, quality, health/safety, and cultural considerations through investment, policy, research, and partnerships between tourism stakeholders, communities, and faiths. With strategic management, gastronomy tourism can drive cultural preservation, socio-economic development, and inter-faith harmony throughout the organization.

6.3. Emerging Drivers of the Demand and Supply

This subsection discusses the emerging demand and supply drivers in gastronomy tourism. These drivers are factors shaping the development of gastronomy tourism, including changes in consumer behaviour, technological advancements, and shifting industry trends.

6.3.1 Consumer Behaviour

The future growth and potential of hospitality tourism in the 57 OIC member countries will be primarily determined by changes in consumer behaviour, technological developments, and industry trends. Consumer behaviour is essential in developing gastronomy tourism in OIC countries (Bismala & Siregar, 2020). Today's travellers increasingly seek authentic and meaningful experiences, using food to connect with local cultures. Consumers seek unique and memorable dining experiences that allow them to sample local cuisine, learn about the history and traditions behind the food, and connect with local people (Paulauskaite et al., 2017).

This desire for authenticity is reflected in the growing popularity of food and drink tours, cooking classes, and farm-to-table experiences. These experiences allow travellers to immerse themselves in the local food culture, learn new cooking techniques, try fresh foods, and meet local producers and artisans (Güneş, 2019).

Advances in technology and shifts in industry trends will also affect the growth of gastronomy tourism in OIC countries. Combining these drivers will create new opportunities for recognizing, appreciating, and preserving local food cultures, which is essential for gastronomy tourism. At the same time, adopting improved technologies and industry practices will make the sector more efficient, sustainable, and competitive (Mukherjee et al., 2022).

Changes in consumer behaviour, technological advances, and the transformation of industry trends create the promising potential for the future of gastronomy tourism in OIC countries (Kamarudin & Nizam, 2013). Their combination will revitalize and enrich the gastronomy tourism industries of the OIC countries. By recognizing and harnessing these drivers, OIC countries can strengthen their gastronomy tourism sector.

6.3.2 Advancements in Technology

Advances in technology have had a significant impact on the development of gastronomy tourism in the OIC countries. Technology has made it easier for consumers to search and plan their trips and create new opportunities for food-related experiences (Hjalager, 2022; Turgarini et al., 2021). For example, the rise of food and beverage apps and websites in OIC countries allows consumers to search for and discover new restaurants, cafes, and bars in their desired destination. These platforms provide access to reviews, ratings, and recommendations from fellow travellers, helping consumers decide where to eat and drink.

Technology has also enabled the development of innovative food-related experiences, such as virtual cooking classes and online food in OIC countries (Deliyannis et al., 2022; Hjalager, 2022). Although accessed remotely, these experiences allow travellers to connect with local chefs and food experts without leaving home. Other technology trends gaining momentum in gastronomy tourism include online reservations, mobile payments, and artisanal food delivery (Babcock, 2015). These innovations improve convenience, affordability, and the overall dining experience for travellers. At the same time, introducing cashless payments and electronic menus minimizes queuing time and contact and improves hygiene standards during the COVID-19 pandemic (Gaffar et al., 2022).

Advances in technology, including food apps, websites, virtual experiences, and online services, have revolutionized how travellers in OIC countries discover, experience, and engage with local cuisine. By leveraging technology, the gastronomy tourism industry can provide personalized, seamless, safe food experiences to attract domestic and international visitors (Tulkinovna & Ugli, 2023). Emerging technologies such as artificial intelligence, virtual reality, and blockchain can transform gastronomy tourism in the OIC region (Figure 6). For example, AI has the potential to provide personalized restaurant recommendations based on customers' tastes and preferences. VR/AR can enable immersive virtual tours, tastings, and cooking classes. Furthermore, blockchain can build trust in local food and improve traceability through certified provenance (Rodgers & Young, 2008).

Figure 6: Dining Table Animation Applications

Source: Spence (2023). Note: A: *Le Petit Chef* (2023), B: *Cruise Critic* (2023), C: *Can Luxury* (2023), D: *Great Taste* (2023)

6.3.3 Industry Trends

Major industry trends, including sustainable tourism and interest in health and wellness, are changing the course of hospitality tourism in OIC countries. Sustainable tourism is becoming increasingly crucial as travellers become more concerned about their travels' environmental and social impact. They are looking for ways to minimize their footprint and support local communities. This is evident in the popularity of farm-to-table experiences, where consumers can learn about sustainable agriculture and regional food systems. Restaurants and food companies in OIC countries are also adopting sustainable practices such as reducing food waste and sourcing from local producers (Rinaldi, 2017; Vázquez-Martinez et al., 2019).

The wellness trend influences gastronomy tourism as consumers seek healthy and nutritious options. Food is being used to improve physical and mental well-being. This includes wellness retreats with yoga, meditation, and healthy cooking in OIC destinations (Block et al., 2011). Healthy and plant-based menu options are also rising in restaurants and food brands. These trends provide opportunities for unique selling propositions (USPs) and competitive advantages in OIC gastronomy tourism (Chang et al., 2021). Sustainable tourism can position destinations as progressive and environmentally friendly, appealing to responsible travelers. A focus on wellness positions food as preventative healthcare, attracting health-conscious consumers (Bublitz et al., 2015). Some challenges remain, including a limited supply of local organic ingredients and little infrastructure for health/wellness offerings in OIC countries. However, these trends can flourish with support, generating additional tourism revenues and improving health standards (Freedman, 2015).

Sustainability and wellness are shaping gastronomy tourism in the OIC region. Recognizing and adapting to these trends will allow member countries to cater to travellers' evolving priorities and preferences. From farm tours to fitness classes, OIC countries can offer experiences that align with sustainability and wellness mind-sets. By harnessing trends such as sustainability and wellness, OIC countries can improve tourism competitiveness, strengthen local communities and enhance visitor experiences on an unprecedented scale.

6.4 New Developments on the Nexus of Local Culture and Gastronomy Experience

Gastronomy tourism involves the exploration of local cuisines, food cultures, and cultural traditions. Due to its growing popularity, especially among gourmet tourists and cultural foodies, gastronomy tourism has become a preferred travel activity (Mohanty et al., 2020).

Local culture is an essential element of gastronomy tourism. Local culture refers to a community or society's traditions, values, beliefs, and practices. It encompasses various aspects of life, including art, music, dance, language, religion, and food tastes and presentations. Gastronomy tourism offers tourists the opportunity to experience culture through food, often the most tangible and visible expression of a society's culture (Hegarty & O'Mahony, 2001). Local cuisine is integral to a destination's culture, reflecting the region's history, geography, climate, and social norms. Linking local culture and gastronomy means integrating local culture and food experiences into tourism activities (Parrott et al., 2002). The aim is to enable tourists to experience local culture through food to provide an authentic and unique local cultural experience (locavore). This concept is based on the idea that food is an integral part of a destination's identity and can help to promote and preserve local culture through tourism by showcasing local cuisine (Park et al., 2021). The link between local culture and the food experience can be achieved through various tourism activities such as cultural tours, food festivals, cooking classes, farm-to-table experiences, and food and drink pairing events (Dixit, 2019).

Cultural tours are one of the most famous gastronomy tourism activities. A cultural tour is a guided tour to explore the local food culture in markets, restaurants, and shops. The guide informs tourists about the local cuisine, ingredients, cooking techniques, and the cultural significance of food. The tour may also include visits to local farms, vineyards, or food factories to understand the food production process (De Jong et al., 2018).

For example, the Marrakech Food Festival at Jemaa El Fna Square is a lively culinary event in the heart of Marrakech, Morocco. Set in the vibrant Jemaa El Fna Square, a UNESCO World Heritage site, the festival showcases the diverse flavors of Moroccan cuisine. Visitors can indulge in a mouth-watering array of traditional dishes like tagines and couscous, prepared by local chefs and street vendors. The festival also features live music, cultural displays, and entertainment, creating a vibrant atmosphere that celebrates the rich culinary heritage of Morocco (Figure 7) (MWN, 2023).

Figure 7: Marrakech Food Festival at Jemaa El Fna Square



Source: MWN (2023)

Food festivals are another popular gastronomy tourism activity, showcasing local cuisine and allowing tourists to sample various local delicacies. Festivals often include live music, cultural performances, and cooking demonstrations to give visitors a complete cultural experience. Cooking classes allow tourists to learn how to prepare local delicacies with local chefs. Lessons can take place in a professional kitchen or the home of a local family, providing a unique and intimate experience of local culture (Lee & Arcodia, 2011). Farm-to-table experiences involve visiting local farms and markets to source clean and fresh ingredients for a meal. This activity provides an opportunity to understand the food production process and taste the prepared food. Food pairing activities focus on understanding and pairing local food and drink culture with local food (Carvalho et al., 2021).

Nevertheless, the success of gastronomy tourism activities depends on some factors, such as the availability of local cuisine, the quality of the experience, and the promotion of the destination's food culture (Yoo et al., 2022). Destination marketing organizations (DMOs) are also crucial in promoting gastronomy tourism. DMOs can promote gastronomy tourism by developing food routes, organizing food-related events, and working with local restaurants and chefs (Sio et al., 2021).

Concluding Remarks

The link between local culture and gastronomy experience is one of the critical concepts of gastronomy tourism. Experiencing local culture through food means integrating it into tourism activities to offer tourists an authentic and unique experience. Popular gastronomy tourism activities such as cultural tours, food festivals, cooking classes, farm-to-table experiences, and food and drink pairing events highlight local cuisine and promote the destination's culture. The success of gastronomy tourism depends on the diversity of local cuisine, the quality of the experience, and cooperation between organizations. By preserving and enhancing local culture, gastronomy tourism can positively contribute to the local economy, environment, and social well-being.

Challenges are also associated with developing gastronomy tourism in the OIC region. Inadequate infrastructure, limited availability of trained/certified staff, and lack of institutional cooperation can limit the sector's growth. However, the increasing number of international visitors, improved transport networks, and technological advances make gastronomy tourism an attractive option for OIC member countries. With the sector's development, local communities will be economically empowered, social welfare will increase, and the environment will be protected. In conclusion, gastronomy tourism in the OIC region has a unique potential and a rich historical and cultural heritage. If supported by investment, infrastructure development, institutional cooperation, and marketing efforts, gastronomy tourism can be an important niche tourism market in many OIC countries.

In this context, OIC countries need to adopt a collaborative and integrated approach to overcome prevailing challenges and unlock the potential of gastronomy tourism. This approach should involve key stakeholders, including government agencies, tourism organizations, local communities, and private sector actors. It should also include the development of policies and strategies that prioritize the development of the tourism sector and promote local food and drink experiences. An effective way to encourage gastronomy tourism is to develop food and drink trails to showcase local food and drink experiences and connect tourists with local producers and artisans. Food and drink trails can also help raise awareness of the region's cultural and culinary heritage and contribute to the preservation of local food traditions. Another way to promote gastronomy tourism is to develop culinary tourism events and festivals, which can draw the attention of tourists from around the globe.

These events can showcase local cuisine and allow tourists to interact with local chefs, food producers, and artisans.

It is also essential to develop capacity-building programs to help local communities and businesses develop and market their gastronomy tourism products and services (Moayerian et al., 2022). These programs include hospitality, marketing, business development, product development, and branding assistance training. In conclusion, gastronomy tourism has the potential to contribute significantly to the economic development of OIC countries while promoting cultural understanding and appreciation. However, realizing this potential requires a collaborative and integrated approach involving key stakeholders and the development of policies and strategies that prioritize the development of the tourism sector and the promotion of local food and drink experiences. With the proper support and enhanced investment, OIC countries can develop a vibrant and sustainable gastronomy tourism sector.

Chapter 7

7. STATE OF GASTRONOMY TOURISM AND RECENT TRENDS IN OIC COUNTRIES

This chapter provides an overview on the state of gastronomy tourism and looks at recent trends in OIC countries.

Broadly speaking, gastronomy tourism is a burgeoning industry that showcases the diverse culinary traditions and flavours of these nations. Recent trends have shown an increase in immersive experiences such as cooking classes, food festivals, and culinary heritage trails. With the advent of social media, gastronomy tourism has gained significant popularity, inspiring travellers to explore the gastronomy treasures of the OIC countries. The potential for growth in this sector is enormous, and by investing in infrastructure, fostering cooperation and promoting sustainable practices, these countries can become leading destinations for foodie travellers, offering them a taste of authentic culture and unforgettable culinary delights.

Gastronomy tourism is a fast-growing travel industry segment that focuses on experiencing local food and drink culture. It is projected to grow at 25% per year, with travellers seeking authentic and sustainable culinary experiences rooted in a destination's culture and traditions (Ullah et al., 2022). The rise of food tourism apps and websites has made it easier for people to discover new culinary experiences (Testa et al., 2019; Bazzani et al., 2015). While food tourism has flourished in various regions, many OIC countries have yet to tap into this potential. However, some member countries such as Türkiye, Malaysia, and Indonesia have made significant progress in promoting their gastronomy tourism offerings.

7.1 The State of Gastronomy Tourism in OIC Countries

OIC countries in Asia, Africa, and Arab regions represent diverse cultures and traditions, and gastronomy tourism can significantly boost OIC countries' tourism industry. Many travellers today seek unique and authentic experiences, and culinary tourism offers that. By promoting their culinary heritage, OIC countries can attract foodies and travellers interested in exploring new flavours and cultures (Amin, 2021). OIC countries have a rich and diverse culinary heritage that can attract tourists from all over the world. From traditional dishes to modern fusion cuisine, OIC countries have something unique to offer (Yan et al., 2017). However, despite their potential, many OIC countries have yet to fully tap into the gastronomy tourism market. One of the reasons for this is the need for more awareness among tourists about the diversity and richness of the food cultures in OIC countries. Many tourists need more knowledge of the cuisine in these countries, leading to a missed opportunity for tourism growth. The lack of infrastructure and facilities, including food and beverage services and culinary tourism experiences, can deter potential visitors. To this end, OIC countries need to develop their gastronomy tourism infrastructure, and facilities for food tours, cooking classes, and food festivals must be improved in many destinations (Annathurai et al., 2020). There is also a need for more awareness and promotion of gastronomy tourism offerings, with limited use of digital marketing to reach a wider audience. Nevertheless, factors such as travellers' growing interest in unique culinary experiences, the rise of social media and food blogging, and culinary events and festivals contribute to the growth of food tourism in OIC countries (Boniface, 2017; Gheorghe et al., 2014; Lee et al., 2015; Yousaf & Xiucheng, 2018).

Despite their enormous potential, OIC countries need better promotion and marketing campaigns about their culinary heritage to attract more visitors. Besides, there is a need for better infrastructure and facilities to support gastronomy tourism (Tafel & Szolnoki, 2021). Another challenge is the perception of some OIC region's destinations as unsafe or unstable, which can discourage potential tourists from visiting (Zheng et al., 2022). This perception is often fuelled by media coverage of these countries' political unrest or religious conflicts.

Despite all these challenges, OIC countries also have opportunities to tap into the gastronomy tourism market. One of the opportunities is the growing interest in halal tourism. With over 1.8 billion Muslims worldwide, the tourism market is expected to reach \$300 billion by 2026. OIC countries can capitalize on this market by promoting their cuisine and providing halal-friendly facilities and services (Battour et al., 2022; Battour & Ismail, 2016). Another opportunity is the trend toward sustainable and responsible tourism. Many tourists now prioritize destinations that offer sustainable and eco-friendly experiences (Siswanto, 2015). OIC countries can showcase their traditional farming and fishing practices and promote local and organic ingredients to appeal to this market. Indeed, each OIC country has its own unique dishes and flavours. Trying these flavours is a great way to explore different cultures and cuisines. This offers a great potential to promote gastronomy tourism in the OIC region.

However, to fully tap into the gastronomy tourism market, OIC countries must develop infrastructure and facilities to support culinary tourism. This includes investing in food and beverage services, developing culinary tourism experiences, and providing training and support for local chefs and food businesses. OIC countries can also develop marketing and promotion strategies to raise awareness of their unique culinary heritage (Nilsson et al., 2011). This contains partnering with travel agencies, organizing food festivals and events, and leveraging social media and digital marketing platforms (Sigala et al., 2012).

Several OIC countries have successfully tapped into the gastronomy tourism market and are reaping the benefits. Malaysia, for example, has become a popular destination for halal tourism, with its diverse and delicious halal cuisine (Samori & Sabtu, 2014). Türkiye has also capitalized on its rich culinary heritage, offering tourists culinary tours and cooking classes (Şengül & Türkay, 2016). Morocco has developed a comprehensive strategy to promote its gastronomy tourism, including investing in food and beverage services, developing culinary tourism experiences, and partnering with travel agencies to promote its unique cuisine (Lakovou et al., 2009). As a result, Morocco has seen significant growth in its tourism industry, with gastronomy tourism contributing a substantial portion of the revenue.

OIC countries can leverage various marketing and promotion strategies to promote gastronomy tourism. This includes partnering with travel agencies, creating social media and digital marketing campaigns, and organizing food festivals and events (Hays et al., 2013). OIC countries can also develop culinary tourism packages and offer cooking classes and workshops to attract more visitors. Additionally, OIC countries can collaborate with other countries and organizations to promote their unique culinary heritage (Hribar et al., 2021). For example, OIC countries can participate in international food and beverage expos and partner with international culinary organizations to showcase their cuisine and attract more visitors.

OIC countries can develop unique culinary tourism experiences to attract more gastronomy tourists. This includes offering food tours and tastings, cooking classes and workshops, farm and fishing

excursions, and cultural and historical food experiences (Kokkranikal & Carabelli, 2021). These experiences can showcase the local food culture and give tourists an immersive and memorable experience. OIC countries can also develop halal-friendly tourism experiences, such as halal food tours and cooking classes, to cater to the growing halal tourism market (Yan et al., 2017).

To fully realize the potential of gastronomy tourism, OIC countries need to work towards addressing the industry's challenges. This includes improving infrastructure and facilities, promoting their unique cuisine and culinary heritage, and addressing safety and security concerns. In addition to the economic benefits, gastronomy tourism can have a significant social and cultural impact. OIC countries can promote cultural exchange and understanding by showcasing their culinary heritage, leading to greater tolerance and harmony between nations. Furthermore, gastronomy tourism can provide a platform for local communities to showcase their culinary traditions and share their stories with the world. This can help preserve and promote traditional food practices and support local food businesses, leading to more excellent economic opportunities for the community.

Overall, the state of gastronomy tourism in OIC countries presents challenges and opportunities. By investing in infrastructure, promoting their unique cuisine and culinary heritage, and leveraging marketing and promotion strategies, OIC countries can unlock the full potential of gastronomy tourism and contribute significantly to their local economy and culture. Some selected examples

Malaysia: Malaysia has successfully positioned itself as a sought-after destination for food and beverage tourism, with a particular focus on halal tourism. This niche market has experienced significant growth and is projected to be worth around \$4.3 billion by 2020, according to the Global Muslim Travel Index for that year (2021).

Indonesia: Indonesia, with its rich and diverse culinary heritage, has immense potential for gastronomy tourism. While specific market size data may be somewhat limited, estimates suggest that gastronomy tourism is a significant contributor to Indonesia's broader tourism industry. In 2019, total tourism receipts in Indonesia reached an impressive \$20.1 billion, according to the Indonesian Ministry of Tourism and Creative Economy.

Morocco: Morocco has been making significant efforts to boost its gastronomy tourism sector, leading to substantial growth in recent years. While precise market size figures may be challenging to obtain, gastronomy tourism plays a significant role in Morocco's overall tourism industry. In 2019, the country generated \$7.5 billion in tourism receipts, as reported by the World Bank. Morocco's culinary scene has become a major attraction for travelers, offering a diverse range of flavors and culinary traditions that reflect the country's rich history and cultural influences. From the bustling markets and street food vendors in cities like Marrakech and Casablanca to the fine dining establishments that blend traditional Moroccan dishes with modern innovation, the country's gastronomy tourism has something to offer every type of food enthusiast. Moroccan cuisine is characterized by its use of aromatic spices, fresh ingredients, and a combination of flavors that include sweet, savory, and spicy elements. Dishes like tagine, couscous, and pastilla are not only delicious but also offer a glimpse into the Moroccan way of life. Moreover, the Moroccan tea ceremony, with its mint tea and traditional preparation, is an integral part of the culinary experience. Morocco has recognized the potential of its culinary heritage and has been actively promoting it as a key aspect of the travel experience. Food festivals, cooking classes, and tours that explore the local markets and traditional food preparation have become popular activities for tourists. As Morocco continues to invest in its gastronomy tourism

sector, it's expected to further drive the growth of the overall tourism industry. With its unique and diverse culinary offerings, Morocco is likely to remain an attractive destination for travelers seeking a culinary adventure.

7.2 Recent Trends in Gastronomy Tourism

The focus on experiential and immersive travel has increased the demand for food and beverage experiences (Stone et al., 2018). OIC countries are particularly well-positioned to offer unique gastronomy tourism experiences due to their rich agricultural and food heritage. In recent years, gastronomy tourism has become a significant driver of tourism growth worldwide, and OIC countries are no exception (Dabeedooal, 2022).

One of the recent trends in gastronomy tourism is the focus on sustainable and local food (Liberato et al., 2020). Additionally, many tourists are seeking healthy and organic food options, which can be found in the traditional cuisines of OIC countries. Another trend in gastronomy tourism is the fusion of different cuisines (Peštek & Činjurević, 2014). Mixing culinary traditions from different cultures can create exciting and unique tourist food experiences (Sidali et al., 2015). OIC countries can leverage their diverse food cultures to make fusion cuisine that appeals to various tastes and preferences.

The gastronomy tourism industry has been evolving and has been affected by new trends. Some of these critical trends are summarized in Figure 8.

Figure 8: Sustainable Local Food System



Source: Boston Organics, 2023

Sustainable and Local Food: Travellers seek local and sustainable food experiences such as farm-to-table dining, food tours, and cooking classes (Pamukçu et al., 2021). One of the recent trends in gastronomy tourism is the focus on sustainable and local food. Tourists are increasingly looking for authentic, locally sourced food experiences, and OIC countries are well-positioned to offer such experiences, given their rich agricultural and food heritage. Additionally, many tourists are seeking healthy and organic food options, which can be found in the traditional cuisines of OIC countries (Stein & Santini, 2022).

Fusion Cuisine: Another trend in gastronomy tourism is the fusion of different cuisines. Mixing culinary traditions from different cultures can create exciting and unique tourist food experiences. OIC countries can leverage their diverse food cultures to make fusion cuisine that appeals to various tastes

and preferences (Khichi, 2023; Sarioglan, 2014). Fusion cuisine combines culinary traditions and techniques and is widespread, driven by exploring new flavours and experiences (Sarioglan, 2014).

Farm-to-Table Tourism: Farm-to-table tourism is another growing trend in gastronomy tourism. Tourists are interested in learning about the food production process and want to experience it. OIC countries can offer farm-to-table experiences to tourists, allowing them to see how food is grown, harvested, and prepared (Lozanski & Baumgartner, 2022; Pehin Dato Musa & Chin, 2022) (Figure 9).

Figure 9: Farm-To-Table Tourism



Source: Caribbean Hotel & Tourism Association

Food and Beverage Festivals: Festivals with cooking demonstrations, tastings, cultural performances, and more offer opportunities to participate in community events and learn about food and drink traditions (Sandybayev, 2018). Food and beverage festivals are a great way to showcase local cuisine and attract tourists. OIC countries can organize food and beverage festivals that highlight their diverse food cultures and traditions. These festivals can also provide a platform for local producers to showcase their products (Fritz & Olbrich, 2022).

Culinary Schools and Workshops: Culinary schools and workshops can also attract tourists interested in gastronomy tourism. OIC countries can offer cooking classes and seminars that teach tourists about the local cuisine and cooking techniques. These experiences can provide a deeper understanding of

Figure 10: Culinary Schools and Workshops



Source: lce.edu

the local food culture and create a more memorable experience for tourists (Chiu & Huang, 2022) (see Figure 10).

Street Food Tourism: Street food is an integral part of the local food culture in many OIC countries. Tourists can experience local cuisine's authentic flavours and aromas by sampling street food. OIC countries can organize street food tours and offer guided tours to tourists to ensure they taste the best street

food in the country. This gastronomy tourism trend provides a unique culinary experience and a glimpse into the local lifestyle and culture (Henderson, 2019; Jeaheng & Han, 2020). The movement has potential across OIC countries from food trucks in Türkiye to street food in Malaysia, Indonesia, and beyond (Wijaya, 2019) (Figure 11).

Figure 11: Street Food Tourism in Egypt



Source: belliesenroute (2023)

Cultural and Heritage Tourism: Cultural and heritage tourism is a growing trend in the tourism industry, and gastronomy tourism can play a significant role. OIC countries have a rich cultural and heritage background, and their food culture reflects their history and traditions. By highlighting their unique food culture and cuisine, OIC countries can attract tourists interested in learning about the country's culture and heritage (Van Westering, 1999) (Figure 12).

Figure 12: Cultural and Heritage Tourism in Dubai



Source: VisitDubai, (2023)

Halal Tourism: Halal tourism is a trend in gastronomy tourism specific to OIC countries. Many tourists who follow halal dietary restrictions are interested in experiencing local cuisine that meets their nutritional requirements. OIC countries can offer halal food experiences that cater to these tourists' needs and attract a new segment of tourists interested in halal tourism (Vargas-Sánchez & Moral-Moral, 2018; Said et al., 2023).

Virtual food experiences: Technology and COVID-19 have led to virtual food experiences such as online cooking classes and tastings to stay connected to food culture while traveling (Richards, 2021). OIC countries could use virtual tours, recipes, and master classes to promote culinary destinations during and after the pandemic (Garibaldi & Pozzi, 2020) (see Figure 13).

Figure 13: Virtual Food Experiences

Source: Poplar Studio (2023)

Deeper insights into history, values, religion, and lifestyle can be gained through the food unique to each OIC member State. Their agricultural history, use of spices, and preservation techniques in different regions create diverse culinary experiences ideal for food tourists seeking cultural enrichment and adventure. Challenges include a lack of tourism infrastructure, resources to develop virtual experiences, cross-industry partnerships to promote destinations, and a perceived conservatism that may limit openness to fusion or progressive food trends in some areas. However, with diverse natural and cultural assets, the potential for OIC countries to lead in the growing food tourism market is significant. This potential can be realized sustainably by strategically tapping into trends, addressing challenges, and maintaining authenticity.

7.3 The Potential for Growth in Gastronomy Tourism in OIC Countries

Despite the challenges facing OIC countries, there is a vast potential for growth in the gastronomy tourism sector. OIC countries can leverage their unique food cultures and heritage to attract tourists from all over the world. One way to tap into this potential is by developing food and beverage tourism infrastructure and facilities, such as food tours, cooking classes, and cultural events. Additionally, promoting and marketing the culinary heritage of OIC countries through social media, blogs, and other online platforms can help raise awareness and attract more tourists.

Tourism is a vital sector for the economies of many countries (D'Amore, 1998). It provides employment opportunities, generates foreign exchange, and promotes cultural exchange (Basariya & Ahmed, 2019). Among the different types of tourism, gastronomy tourism is emerging as a lucrative niche market. Gastronomy tourism refers to travel motivated by a desire to experience a particular destination's local food, culture, and cuisine (Balderas-Cejudo et al., 2019). OIC countries comprising 57 member States are rich in cultural heritage, including their unique food cultures. These countries have various ingredients, spices, and cooking techniques that have evolved over centuries. With the increasing interest in authentic food experiences, OIC countries have enormous potential to attract tourists worldwide (OIC, 2023; SESRIC, 2023; ICIEC ISDB, 2023).

a) Unique Food Cultures

OIC countries are home to a diverse range of food cultures. Each country has unique ingredients, recipes, and cooking styles from Morocco to Malaysia. For example, Moroccan cuisine is known for its aromatic spices, such as cumin, coriander, and saffron. In contrast, Indonesian cuisine is characterized

by using coconut milk, chili peppers, and turmeric. OIC countries need to showcase their unique food cultures to attract gastronomy tourists. One way to do this is by promoting traditional dishes and ingredients. For example, Malaysia has successfully upgraded its signature dish, Nasi Lemak, which is made of rice cooked in coconut milk and served with various toppings. Another way to showcase unique food cultures is through food festivals and events. For instance, Türkiye hosts the Istanbul Food Festival, attracting worldwide food lovers. These events allow tourists to experience local food cultures and interact with chefs and vendors.

b) Food and Beverage Infrastructure

Gastronomy tourism requires the availability of food and beverage infrastructure, including restaurants, cafes, and food markets. OIC countries need to invest in developing this infrastructure to attract more tourists. For example, Dubai has invested heavily in developing its food and beverage infrastructure. The city boasts a range of high-end restaurants, cafes, and food markets, catering to locals and tourists. OIC countries can also develop specialized food and beverage tourism facilities, such as culinary schools and cooking workshops. These facilities can provide tourists with hands-on experiences with local food cultures and techniques.

c) Culinary Tours

Culinary tours are a popular way to explore local food cultures. OIC countries can develop culinary tours that showcase local ingredients, dishes, and cooking techniques. For example, Egypt offers culinary tours that take tourists to local markets, where they can learn about the different elements.

d) Cooking Classes

Cooking classes are another way to offer tourists hands-on experiences of local food cultures. OIC countries can develop cooking classes that teach tourists to prepare traditional dishes using local ingredients and techniques. For instance, in Morocco, tourists can take cooking classes to learn how to make traditional dishes such as tagine and couscous. These cooking classes allow tourists to learn about local ingredients, spices, and cooking techniques (Figure 14).

e) Cultural Events

Cultural events are an excellent way to showcase the unique food cultures of OIC countries. These events can include food festivals, culinary competitions, and cultural shows. For example, the annual Miskah Festival in Saudi Arabia celebrates the country's food culture. The festival features food stalls, cooking workshops, and cultural shows, attracting thousands of visitors from around the world (Figure 15).

Figure 14: Fes/Morocco Traditional Cooking Class



Source: fes-desert-trips

Figure 15: Miskah Food Festival in Saudi Arabia

Source: Toledo Blade (2023)

f) Social Media Marketing

Social media platforms such as Instagram, Facebook, and YouTube are powerful marketing tools for promoting gastronomy tourism. OIC countries can use social media to showcase their unique food cultures and attract tourists. For example, Malaysia's Ministry of Tourism, Arts, and Culture has a dedicated Instagram account (@malaysia.truly.asia) that showcases the country's food culture. The report features pictures and videos of traditional dishes, food markets, and cooking workshops, attracting thousands of followers.

g) Collaboration and Partnerships

Collaboration and partnerships can help OIC countries leverage their gastronomy tourism potential. Countries can collaborate with international organizations, tourism boards, and food businesses to promote their food cultures and attract more tourists. For instance, the World Food Travel Association is a non-profit organization supporting global culinary tourism. OIC countries can collaborate with such associations and organizations to develop culinary tours and promote their unique food cultures.

h) Government Support

Government support is crucial for the development of gastronomy tourism in OIC countries. Governments can provide funding and incentives for developing food and beverage infrastructure, culinary tours, and cultural events. For example, the Malaysian government has launched the Malaysia Tourism Transformation Plan 2020, which aims to increase tourism revenue by promoting gastronomy tourism.

Concluding Remarks

The chapter reveals that gastronomy tourism could be an enabler for growth with significant economic benefits in many OIC countries. Despite the enormous potential for growth in the gastronomy tourism sector, OIC countries face several challenges. These challenges include inadequate infrastructure, limited marketing budgets, and a need for a more trained workforce.

To overcome these challenges, OIC countries can focus on developing food and beverage infrastructure, promoting their food cultures through social media marketing, and collaborating with

international organizations and tourism boards. Governments can also provide support by investing in the development of culinary schools and workshops and providing incentives for private sector investment in the gastronomy tourism sector.

In particular, OIC countries should develop adequate food and beverage infrastructure to support gastronomy tourism. This requires new investments in restaurants, cafes, food markets, food halls, cooking schools, culinary institutes, and production facilities to source quality ingredients. Specialized restaurants offering traditional OIC cuisine by skilled chefs can be beautiful to food-oriented tourists. World-class dining options are a must to compete on the global gastronomy stage. OIC countries should develop diverse culinary tourism experiences to attract visitors. This includes offering culinary tours showcasing traditional foods and production methods, farm visits, and cooking classes. Experiential tours allow tourists to immerse themselves in local food culture and interact directly with food producers. Home-cooked meals and culinary festivals or events celebrating traditional cuisine also enhance the gastronomy tourism offer.

OIC countries also need to support the culinary tourism sector by establishing or supporting culinary schools and training programs to have trained human capital (e.g. skilled chefs, restaurant staff, and tour guides). Governments can sponsor or subsidize culinary training initiatives to develop local human capital. They can also offer incentives such as tax breaks or grants to attract private sector investment in gastronomy tourism infrastructure and businesses. Targeted policy support facilitates the growth of an industry that a lack of resources might otherwise hamper. OIC countries must effectively market and promote gastronomy tourism potential through culinary branding and public relations campaigns. They should highlight their unique indigenous ingredients, specialties, and food stories to build awareness and appeal. Traditional cuisines have the potential to be reinvented and adapted to cater to global tastes by embracing culinary trends. To promote the culinary heritage of the OIC countries, coordinated efforts are necessary through various channels such as advertising, social media, travel publications, and events. These initiatives aim to build credibility and attract food enthusiasts worldwide who are curious to explore and indulge in the diverse flavours of OIC cuisines. In particular Food bloggers, influencers, and dedicated gastronomy tourism platforms can attract more visitors. Maintaining the authenticity and sustainability of local cuisine and culinary traditions is also crucial (Annathurai et al., 2020).

Chapter 8

8. INVESTMENT ECOSYSTEM IN GASTRONOMY TOURISM

Gastronomy tourism has become a rapidly growing trend in recent years as people seek a deeper and more authentic travel experience by experiencing local food and culture, rather than just visiting popular tourist attractions (Seyitoğlu & Ivanovb, 2020). This demand has increased interest in the gastronomy tourism sector, which in turn has increased investment in the sector. The investment ecosystem for gastronomy tourism consists of various stakeholders, including governments, private investors and civil society organizations (Sánchez-Cañizares & López-Guzmán, 2012). Governments can support the sector through infrastructure investments and financial incentives to attract tourists and strengthen local economies. Private investors can capitalize on growth opportunities by investing in areas such as restaurants, hotels, and tourism experiences. Civil society organizations can contribute to the development of the sector by highlighting the benefits of gastronomy tourism, raising awareness, and providing training and support to businesses (Pilcher, 2023). This investment ecosystem is changing and evolving. There are important factors for success include the availability of skilled labor, the quality of local food, and the creation of appropriate infrastructure. Government support for the sector is also a critical factor affecting the investment ecosystem. In this complex and dynamic environment, businesses and investors can successfully invest and grow in the food tourism sector by making informed decisions and understanding the stakeholders and influencing factors (Sukenti, 2014).

Tourism's labour-intensive nature drives employment. It directly accounts for one in 10 jobs in the world: in 2019, the tourism sector supported around 300 million jobs globally (UNWTO, 2022). Notably, tourism employs more women and young people than any other sector. In OECD countries, women account for 60% of tourism workers. Around 32% of people working in tourism are between 15 and 34 years old. There is evidence that for every \$1 of tourism exports, 89 cents of domestic value added is generated (OECD, 2020). More than 30% of this value comes from indirect impacts on the local value chain, that is through links to other sub sectors such as: passenger transport (21%), accommodation (19%), food and beverage (16%), and other services (44%), among them travel agencies, entertainment, financial services, and digital startups. Around 85% of all these businesses are small and medium enterprises (SMEs) (OECD, 2020).

According to the fDi Intelligence from the Financial Times and UNWTO data, the Tourism Foreign Direct Investment (TFDI) reached \$61.8 billion globally, which, in turn, created more than 135,000 jobs in 2019 (fDi Intelligence Financial Times/ UNWTO, 2020). This translates into 715 FDI projects in 2019, compared with the 648 FDI project in 2018, and 347 FDI projects in 2017. This data shows the resilience of the tourism sector among other sectors that have been declining in the same period. Nevertheless, the COVID-19 pandemic has hit the tourism sector hard. The statistics revealed that global FDI into tourism plummeted by 73.2% in the first half of 2020, compared to that of 2019, putting an end to the sector's record high years (UNWTO, 2022).

There is evidence that the world's major sources of FDI in tourism are located in developed countries (as much as 90%). Less than 10% of total outward tourism related FDI stocks is concentrated in developing countries (UNCTAD, 2007, 2010, 2020). However, there is a trend to increase the efforts particularly in Latin America and the Caribbean, where FDI reached new record levels in recent years.

For instance, tourism FDI created more than 56 thousand jobs in Mexico from 2015 to 2019. It was also strong in the Middle East and Africa, where it rose to the highest level in a decade in 2019 (fDi Intelligence Financial Times/ UNWTO, 2020).

8.1 Investment Ecosystem and Key Issues

In the domain of gastronomy tourism, several factors could drive the investments in OIC countries. Firstly, there is a significant rise in the number of Muslim tourists, projected to reach 1.8 billion by 2030 (Pew Research Center, 2023). These travellers seek authentic experiences and view gastronomy tourism as an excellent opportunity to immerse themselves in the culture and cuisine of OIC countries. Secondly, food tourism has gained popularity worldwide, and OIC countries are well-positioned to leverage this trend due to their wide range of food options, ranging from traditional dishes to innovative fusion cuisine. Lastly, many OIC countries offer a favourable investment climate, attracting investors through tax incentives, business support, and other advantages for those interested in ventures related to gastronomy tourism (SESRIC, 2022).

The investment ecosystem in gastronomy tourism in OIC countries is expanding rapidly, offering enticing prospects for investors. Two primary investment avenues include establishing or investing in restaurants and hotels and supporting food festivals and events. Investors can either initiate their own culinary establishments or contribute to existing ones. Additionally, investing in food production and processing is a longer-term option, yet it yields significant rewards. This approach involves investing in businesses that specialize in traditional food production or innovative fusion cuisine. As this sector continues to expand, it will generate fresh opportunities for investors intrigued by the prospects of this market.

Although gastronomy tourism is one of the fastest growing areas of the tourism sector, there is not enough capacity to support the growth. This is mainly due to the lack of restaurants, hotels and other infrastructure. In addition, the lack of skilled labour in the sector also negatively affects the development of the tourism sector. Gastronomy tourism is not sufficiently promoted, which has become another factor discouraging tourists from choosing such destinations. In addition, legal barriers in some countries also hinder the growth of gastronomy tourism. Finally, the issue of sustainability should not be overlooked, as some destinations do not adhere to the principles of sustainability, which is a factor hindering the growth of the sector. New investment projects could help to address some of these challenges by bringing a new understanding on management techniques and technologies for operations (IsDB, 2023).

8.2 Recent Developments in the World and OIC Countries

This sub-section provides an overview on recent developments in relation to investment landscape in gastronomy tourism in the world and OIC countries. Some selected examples are as follows:

- ✓ One of Türkiye's most famous chefs, CZN Burak has gained global fame with more than 35 million followers on Instagram. It opened a new restaurant in Doha and became the centre of attention for Qatari and foreign tourists (Peninsula, 2023).
- ✓ Wagamama, a British restaurant chain, wanted to grow in the Turkish market. Wagamama opened its first branch in Istanbul and is known for its healthy and delicious Japanese food (Wagamama, 2023). Danone, a French food company, wanted to grow in Türkiye and become a leader in the dairy market. To this end, it acquired 50% of Süttaş, one of Türkiye's largest dairy producers (Course Hero, 2023).

- ✓ Qatar Investment Authority (Qatar's sovereign wealth fund) has invested \$45 billion in McDonald's, the largest restaurant chain in the United States. The investment is aimed at developing Qatar's tourism sector (Reuters, 2023). Qatar's Ministry of Tourism has launched a new gastronomic tourism campaign to promote the country's rich culinary culture and gastronomic tourism potential (Refaad, 2023).
- ✓ Saudi Arabia's Ministry of Culture has opened a new gastronomy center to preserve and promote the country's rich culinary culture and gastronomic heritage. At the same time, Saudi Arabia's Ministry of Tourism launched a campaign to promote food and beverage tourism (Culinary, 2023).

8.3 Successful Examples of Attracting FDI in Gastronomy Tourism

OIC countries, with their rich cultural heritage and diverse culinary traditions, are actively pursuing strategies to attract FDI in gastronomy tourism. These countries recognize the potential of their unique cuisines and food experiences to attract international tourists and investors alike. By leveraging their culinary assets, OIC countries aim to enhance their tourism sector, promote cultural exchange and stimulate economic growth.

Tourism is a global force for economic growth and development, generating \$ 1.7 trillion annually; this represents about 4% of global GDP and around 29% of service exports. Its labour-intensive nature drives employment. Indeed, tourism directly accounts for one in 10 jobs in the world: in 2019, the tourism sector supported around 300 million jobs globally (UNWTO, 2019) (Figure 16).

Figure 16: Sustainable Development Goals



Source: UNWTO (2023)

To attract FDI in gastronomy tourism, OIC countries have taken various measures and initiatives. For example, some OIC countries have developed comprehensive marketing campaigns to showcase their authentic tastes, traditional cooking techniques and culinary diversity to a global audience. These campaigns highlight the unique gastronomy experiences that these countries offer, such as vibrant street food markets, food festivals and farm-to-table experiences (UNWTO, 2023).

As the tourism potential of the Middle East is growing rapidly, OIC countries such as UAE, Morocco, Qatar and Saudi Arabia are making great efforts to strengthen the tourism sector in the region and attract more visitors (The National, 2022; The New York Times, 2022; FIFA, 2022; The Wall Street Journal, 2022):

- Dubai has selected Hilton Group to develop a new investment about \$1 billion in 2022 to establish a new hotel. This new hotel will contribute to Hilton Group's growth in the Middle East market and will be located in the centre of Dubai, offering 500 rooms and suites.
- The X restaurant chain has also decided to invest in Morocco by opening a new Chinese restaurant in Rabat. This restaurant will be an important contribution to Morocco's gastronomic tourism and aims to attract more tourists to the city of Rabat.
- Qatar hosted the 2022 FIFA World Cup, a major economic opportunity. This event attracted significant foreign direct investment into the country, boosting Qatar's tourism sector and attracting more tourists to the country.
- Saudi Arabia is investing heavily in infrastructure as part of its Vision 2030 program. These investments are aimed at making Saudi Arabia more attractive for tourism and investment. The country's \$100 billion investment in the tourism sector is seen as a step towards its goal of 100 million tourists per year.
- Similarly, Egypt is also making great efforts to develop its tourism sector and plans to invest \$ 10 billion for this purpose. As a result of this investment, Egypt hopes to attract 50 million tourists per year.

In addition, some member countries have introduced favourable investment policies and incentives to encourage foreign investors to establish restaurants, culinary schools, food-related infrastructure, and other ventures. Governments have facilitated the investment process, streamlined regulations, and provided support to culinary entrepreneurs to ensure a conducive business environment.

Investment Promotion Agencies (IPAs) play a critical role in facilitating investment processes and promoting the investment potential of countries. IPAs provide a range of services to investors, including Providing information on the country's investment climate, assisting with visa and work permit applications, helping to find suitable business locations, and providing networking opportunities for investors. IPAs are an important part of the investment ecosystem and play a key role in attracting foreign direct investment (FDI) to countries (ICDT, 2022).

The ICDT 2022 Investment Report states that: "IPAs have also played a critical role in facilitating investment processes, while playing an active role in promoting countries' investment potential." The report goes on to say that IPAs are becoming increasingly important as countries compete for FDI. IPAs that are able to provide quality services and effectively promote their countries will be more successful in attracting FDI.

Collaboration between the public and private sectors has also played a critical role in attracting FDI in culinary tourism. Governments have actively engaged with industry stakeholders, tourism boards and culinary associations to develop strategies to promote their countries as gastronomy tourism destinations. Partnerships with renowned chefs, food critics and influencers have also been forged to increase the visibility and appeal of culinary offerings. OIC countries have also recognized the importance of capacity building and skills development in gastronomy tourism. Investments have been made in culinary training centres, culinary schools, and vocational programs to nurture local talent and improve the quality of culinary offerings. This focus on skills development ensures a

sustainable gastronomy tourism industry that can provide visitors with authentic and memorable experiences (OIC, 2023; Wolddata, 2023).

Selected Examples from OIC Countries on their Gastronomy Tourism Values

Qatar

With more than 10,000 restaurants, Qatar has established itself as a major destination for food lovers. The typology of tourists visiting these establishments shows a predominant presence of European visitors, followed closely by Middle Eastern and Asian tourists. The top 10 countries contributing to this culinary tourism include the United Kingdom, Germany, France, Italy, Spain, United Arab Emirates, India, Pakistan and Türkiye. In particular, many restaurants have gained popularity among tourists, such as Al Mahara, IDAM, Zuma, The Grill Room, and Qbara. These establishments offer unique dining experiences that showcase the diverse culinary traditions and flavours of Qatar (Table 14).

Table 14: Gastronomy Tourism Values of Qatar

FEATURE	DATA
NUMBER OF RESTAURANTS	Over 10,000
TYPOLOGY OF TOURISTS VISITING RESTAURANTS	Majority are European, followed by Middle Eastern and Asian tourists
COUNTRIES OF ORIGIN OF TOURISTS VISITING RESTAURANTS	Top 10 countries: United Kingdom, Germany, France, Italy, Spain, United Arab Emirates, India, Pakistan, Türkiye
EXAMPLES OF RESTAURANTS POPULAR WITH TOURISTS	Al Mahara, IDAM, Zuma, The Grill Room, Qbara

Source: (WTTC, 2023; UNWTO, 2023; Lonely Planet, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

Indonesia

There are more than 100,000 restaurants in the country, attracting a wide range of tourists. The typology of tourists visiting these restaurants shows that the majority are from European countries, followed by Asian and Middle Eastern tourists.

Table 15: Indonesia Gastronomy Tourism

FEATURE	DATA
NUMBER OF RESTAURANTS	Over 100,000
TYPOLOGY OF TOURISTS VISITING RESTAURANTS	Majority are European, followed by Asian and Middle Eastern tourists
COUNTRIES OF ORIGIN OF TOURISTS VISITING RESTAURANTS	Top 10 countries: France, Germany, Italy, Spain, United Kingdom, United States, Australia, China, Japan
EXAMPLES OF RESTAURANTS POPULAR WITH TOURISTS	Quan An Ngon, Huong Sen, Le Jardin, The Deck, The Tasting Room

Source: (WTTC, 2023; UNWTO, 2023; Lonely Planet, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

The top 10 countries of origin for these tourists include France, Germany, Italy, Spain, the United Kingdom, the United States, Australia, China and Japan. In addition, several restaurants have gained popularity among tourists, such as Quan and Ngon, Huong Sen, Le Jardin, The Deck, and The Tasting Room. These findings shed light on the importance of gastronomy as a driver of tourism in Indonesia and highlight the international appeal of the country's culinary offerings (Table 15).

Nigeria

Nigeria has a significant number of restaurants, with more than 100,000 establishments. The typology of tourists visiting these restaurants shows that the majority are Africans, with Europeans and Middle Easterners the next largest groups of visitors. Looking at the countries of origin of these tourists, the top 10 nations include the United Kingdom, United States, France, Germany, Italy, Spain, Netherlands, Belgium and Portugal. Notable restaurants favored by tourists seeking culinary experiences include The Palms Restaurant, The Wheatbaker, The Oriental Restaurant, The Golden Gate Restaurant, and Tantalizers. These establishments have gained popularity among both local and international visitors, contributing to the growth of gastronomy tourism in Nigeria (Table 16).

Table 16: Gastronomy Tourism Values of Nigeria

FEATURE	DATA
NUMBER OF RESTAURANTS	Over 100,000
TYOLOGY OF TOURISTS VISITING RESTAURANTS	Majority are African, followed by European and Middle Eastern tourists
COUNTRIES OF ORIGIN OF TOURISTS VISITING RESTAURANTS	Top 10 countries: United Kingdom, United States, France, Germany, Italy, Spain, Netherlands, Belgium, Portugal
EXAMPLES OF RESTAURANTS POPULAR WITH TOURISTS	The Palms Restaurant, The Wheatbaker, The Oriental Restaurant, The Golden Gate Restaurant, Tantalizers

Source: (WTTC, 2023; UNWTO, 2023; Lonely Planet, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

Uzbekistan

The emergence of gastronomy tourism as a prominent sector in Uzbekistan has been accompanied by a significant growth in the number of restaurants, which now exceeds 50,000. These restaurants have become popular with a wide range of tourists, with the majority coming from Europe, followed by visitors from the Middle East and Asia. The top ten countries of origin for these restaurant-goers include Russia, Türkiye, Iran, China, the United Arab Emirates, India, Germany, France, and the United Kingdom.

Table 17: Gastronomy Tourism Values of Uzbekistan

FEATURE	DATA
NUMBER OF RESTAURANTS	Over 50,000
TYOLOGY OF TOURISTS VISITING RESTAURANTS	Majority are European, followed by Middle Eastern and Asian tourists
COUNTRIES OF ORIGIN OF TOURISTS VISITING RESTAURANTS	Top 10 countries: Russia, Türkiye, Iran, China, United Arab Emirates, India, Germany, France, United Kingdom
EXAMPLES OF RESTAURANTS POPULAR WITH TOURISTS	Chashmay restaurant, Starving Student, Laziz, Caravan Serai, Fergana

Source: (WTTC, 2023; UNWTO, 2023; Lonely Planet, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

Notable restaurants that have gained popularity among tourists include Chashmay Restaurant, Starving Student, Laziz, Caravan Serai, and Fergana. The culinary experiences offered by these establishments have played a significant role in attracting tourists and contributing to the growth of gastronomy tourism in Uzbekistan (Table 17).

Uganda

Uganda has over 20,000 restaurants. The majority of tourists visiting these restaurants are Africans, followed by Europeans and Middle Easterners. The top 10 countries of origin of these tourists include the United Kingdom, United States, Kenya, Tanzania, South Africa, India, Netherlands, Belgium and Portugal. Popular restaurants among tourists in Uganda include The Boma Restaurant, The Outpost Restaurant, The Garden Restaurant, The Carnivore Restaurant, and The Secret Garden Restaurant (Table 18).

Table 18: Gastronomy Tourism Values of Uganda

FEATURE	DATA
NUMBER OF RESTAURANTS	Over 20,000
TPOLOGY OF TOURISTS VISITING RESTAURANTS	Majority are African, followed by European and Middle Eastern tourists
COUNTRIES OF ORIGIN OF TOURISTS VISITING RESTAURANTS	Top 10 countries: United Kingdom, United States, Kenya, Tanzania, South Africa, India, Netherlands, Belgium, Portugal
EXAMPLES OF RESTAURANTS POPULAR WITH TOURISTS	The Boma Restaurant, The Outpost Restaurant, The Garden Restaurant, The Carnivore Restaurant, The Secret Garden Restaurant

Source: (WTTC, 2023; UNWTO, 2023; Lonely Planet, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

Morocco

Morocco has more than 15,000 restaurants in the country. European tourists make up the majority, followed by North Americans and Middle Easterners. However, gastronomic experiences from all over the world can be found in Moroccan restaurants due to its popularity as a tourist destination. Some of the most popular restaurants among tourists are Jnane Tamsna, Cafe Clock, Dar Moha, NoMad Marrakech, and La Maison Arabe. Morocco's rich and varied cuisine is famous for its delicious dishes such as couscous, tagines and harira soup (Wolfert, 2012) (Table 19).

Table 19: Gastronomy Tourism Values of Morocco

FEATURE	DATA
NUMBER OF RESTAURANTS	Over 15,000
TPOLOGY OF TOURISTS VISITING RESTAURANTS	The majority of tourists visiting restaurants in Morocco are European, followed by North Americans and Middle Easterners. However, tourists from all over the world can be found in Moroccan restaurants, as the country is a popular tourist destination.
COUNTRIES OF ORIGIN OF TOURISTS VISITING RESTAURANTS	France, Spain, Germany, Italy, United Kingdom
EXAMPLES OF RESTAURANTS POPULAR WITH TOURISTS	Jnane Tamsna, Cafe Clock, Dar Moha, NoMad Marrakech, La Maison Arabe,

Source: (WTTC, 2023; UNWTO, 2023; Lonely Planet, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

Other examples from OIC countries

Türkiye stands out as a country preferred by tourists for its historical and cultural richness with its popular dishes such as baklava, kebabs and pide (Kiliç et al., 2017). Iran's unique and delicious cuisine offers delicious dishes such as khorosht, kebabs and falafel. These flavours, combined with its historical and cultural attractions, make Iran a popular destination that attracts tourists (Khodadadi, 2016). On the other hand, Tunisia's authentic and delicious cuisine also offers a wealth of palate-pleasing options such as couscous, shakshuka and brik, making Tunisia a destination that attracts tourists from all over the world (Goldstein, 2016).

Egypt has a diverse culinary tradition based on its long and rich history, with popular dishes such as ful medames, kebabs and molokhiya. Full of historical and cultural attractions, Egypt stands out as an attractive destination for tourists from all over the world. All these countries are amazing places where travelers can have unforgettable experiences with their rich cuisine and historical values (Jacob & Ashkenazi, 2006).

Saudi Arabia Tourism Authority's announcement in 2018 of a \$6 billion investment earmarked for developing gastronomy tourism. This allocation will be utilized for the construction of new restaurants, hotels, and food festivals. Similarly, the Dubai Tourism Authority launched "Taste of Dubai" in 2019, an initiative aimed at promoting Dubai as a gastronomy tourism destination. The initiative encompasses a series of food festivals, tasting events, and culinary tours. Furthermore, the Islamic Development Bank (2023) established the "Gastronomy Tourism Fund" in 2020, with a target size of \$100 million. The fund's objective is to provide support for investments in gastronomy tourism across OIC countries.

Concluding Remarks

The gastronomy tourism investment ecosystem offers significant opportunities for economic growth, job creation, and cultural preservation. To fully realize these opportunities, governments, investors, and local communities must work together to address key issues such as supportive policies, infrastructure development, and skills development. With their rich culinary heritage, diverse cuisines and cultural traditions, OIC countries are well positioned to attract investment in gastronomy tourism. By showcasing their unique gastronomy experiences, investing in infrastructure and fostering cooperation between local entrepreneurs and foreign investors, OIC countries can unlock the potential of this sector and reap its economic benefits.

However, it is important to ensure that investments in gastronomy tourism are sustainable, respect local communities and preserve cultural authenticity. Balancing economic growth with environmental and social considerations is key to creating a thriving and responsible gastronomy tourism industry. IPAs of OIC countries could play an instrumental role to showcase the potentials of their respective countries in gastronomy tourism such as by publishing brochures and online guidebooks to guide potential investors. In conclusion, investment in gastronomy tourism holds great promise for both developed and emerging economies as well as many OIC countries. By addressing key issues, learning from successful examples, and adopting a sustainable approach, countries can create an enabling investment ecosystem that supports the growth and development of this vibrant sector.

Chapter 9

9. DIGITALIZATION IN GASTRONOMY TOURISM

The convergence of technology and tourism has created new opportunities for businesses to enhance the overall visitor experience and unlock the potential of gastronomy as a key tourist attraction (Hjalager, 2022). This chapter explores the role of digitalization in gastronomy tourism, focusing on new technologies and selecting good practices that have emerged in this area. An important aspect of digitalization in gastronomy tourism is innovative technologies. These technologies, such as mobile applications, social media platforms, and virtual reality, have revolutionized how tourists engage with culinary experiences (Çöl et al., 2023; McKenzie & Janowicz, 2015; Onorati & Giardullo, 2020). For example, mobile applications can provide users with personalized recommendations for local restaurants, allowing them to explore and indulge in authentic gastronomy delights. Social media platforms have also become powerful tools for promoting food tourism, allowing users to share their experiences, discover new culinary destinations, and engage with local communities. In addition, virtual reality has the potential to offer immersive and interactive gastronomy experiences, allowing tourists to virtually explore different cuisines, cooking techniques, and cultural practices (Çöl et al., 2023; Wintergerst, 2023).

There are unique opportunities and challenges when considering the role of digitalization in gastronomy tourism in the context of OIC countries. OIC countries have rich culinary traditions and diverse cultural heritage that can be showcased through digital platforms (Batat, 2021; Hjalager, 2022; Turgarini et al., 2021). By leveraging digitalization, OIC countries can effectively promote their gastronomy tourism offerings, attract a wider audience, and generate economic benefits (Hjalager, 2022). However, addressing infrastructure, connectivity and digital literacy issues is essential to ensure the widespread adoption of digital technologies in these countries. By highlighting selected good practices from OIC countries, the chapter demonstrates some successful digitization initiatives.

9.1. New Technologies and Digitalization

New digital technologies are transforming numerous industries worldwide, and tourism is no exception. The rise of smartphones, social media, Big Data, artificial intelligence, virtual and augmented reality, and other innovations have significantly changed how people research, book, and experience travel (Turgarini et al., 2021). This wave of digital transformation, also known as digitalization, is reshaping gastronomy tourism.

Gastronomy tourism, which involves traveling to experience unique and memorable food and drink, has grown in popularity in recent years. Digital platforms and tools fuel this growth and enhance the gastronomy tourism experience (Hjalager, 2022). From researching dining options on a destination's website and booking tables on OpenTable to sharing food photos on Instagram and saving recommendations on TripAdvisor, technology and digital connectivity are intricately linked with how today's gastronomy tourists plan and share their culinary adventures (Mariani & Bresciani, 2022).

Some of the most important new technologies in gastronomy tourism include:

Mobile and social media: Smartphones and social networks like Facebook, Instagram, and Twitter enable gastronomy tourists to find inspiration, connect with fellow foodies, share photos, write reviews, and stay up-to-date with the latest food trends during and after their trip. Restaurants, bars, craft breweries, and other venues also leverage social media to promote their offerings and engage with customers (Onorati & Giardullo, 2020) (Figure 17).

Figure 17: Social Media



GPS and geolocation services: Apps like Google Maps, Foursquare, and TripAdvisor use GPS and geo-location to help gastronomy tourists discover highly-rated or trendy dining spots nearby based on their location and specified search parameters (McKenzie & Janowicz, 2015). This makes it easy to find the best local eats on the fly while exploring a new destination (Figure 18).

Figure 18: Location-Based App



Source: Agile Tech (2020)

Big Data and Personalization: By analyzing user data like search history, likes, and location, companies can provide personalized recommendations tailored to individual tastes and past preferences. For gastronomy tourists, this can mean suggesting customized itineraries, events, tours, and dining options likely to match their interests based on their data profile. Personalized trip planning and advice will become increasingly sophisticated as more data is gathered and technologies like artificial intelligence continue to advance (Werenowska, 2020).

Virtual and augmented reality: Emerging technologies such as virtual, raised, and mixed reality are creating new ways for gastronomy tourists to explore destinations and dining experiences from afar. When scanning a menu, they can take virtual tours of restaurants, see 360-degree photos of menu items, or get augmented reality descriptions of dishes and drinks. These technologies bring an exciting added layer of immersion, especially when in-person travel is impossible (Çöl et al., 2023). They are still developing but show a promising future for digitally enhanced gastronomy tourism.

Online booking: Online booking has revolutionized the way foodies explore culinary options worldwide. Platforms like Zomato (2023), available in over 200 cities worldwide, provide a seamless experience for users to browse menus, read reviews and effortlessly make restaurant reservations. Similarly, Swiggy (2023), known in India, UAE, Qatar, and other OIC countries, offers a wide selection

of restaurants for food delivery and enables reservations. Careem Now (2023), available in the Middle East and North Africa, combines food delivery and ride-hailing services, allowing users to order from multiple restaurants and reserve tables. ChowNow (2023) partners with restaurants to offer online reservations and food delivery in the United States, Canada, and the United Kingdom. For food tourists in the United Arab Emirates, Saudi Arabia, and Kuwait, EatApp (2023) partners with restaurants to provide a comprehensive solution that includes online reservations and food delivery. These innovative platforms allow foodies to research, reserve, or pre-order at their desired culinary destinations. By removing uncertainty and streamlining the process, these apps ensure that food and drink enthusiasts can enjoy their most anticipated gastronomy experiences with just a few taps on their smartphones (Çöl et al., 2023).

The digital transformation is rapidly changing all aspects of society and the economy. Tourism is no exception. New technologies are transforming how people travel, experience destinations, and share their experiences. For gastronomy tourism, digitalization offers many unique opportunities but poses some challenges. New technologies impacting gastronomy tourism include mobile internet, social media, sharing economy platforms, virtual and augmented reality, artificial intelligence, and big data analytics (Buhalis et al., 2019; Sigala, 2019). Thanks to widespread smartphone adoption and fast mobile internet connections, travelers now always have a wealth of information at their fingertips. They can quickly search for destinations, attractions, restaurants, and reviews on the go. Social media platforms like Instagram, Facebook, and TripAdvisor allow travelers to connect, get inspiration, and share their experiences, especially visually appealing food and dining experiences (Wintergerst, 2023). Sharing economy platforms like Airbnb and EatWith facilitate new ways for travellers to book and experience local, authentic food. Virtual and augmented reality brings new digital experiences (Tran Thi Tuong, 2022). Travelers can take virtual tours of destinations and restaurants or even share simulated meals. Artificial intelligence powers many new services, such as chatbots to help with bookings and recommendations and predictive technologies to customize experiences. Big data analytics help companies gain insights into traveller preferences and behaviour to improve their offerings (Ukpabi et al., 2019).

However, with the opportunities also come challenges. Information overload can overwhelm travellers. Fake reviews and influencers reduce trust in online information. Jobs may be eliminated or transformed. Privacy and data security concerns arise with the growth of personal data collected. Still, most industry experts agree that digitalization is positive for gastronomy tourism as it enhances the overall experience, gives more choices, and builds connections. The key is for companies and destinations to thoughtfully adopt new technologies in a way that emphasizes the human experience.

9.2 The Role of Digitalization in the Development of Gastronomy Tourism

Digitalization is playing a significant role in the development of gastronomy tourism. New technologies make it easier for people to discover and experience fresh food and cultures. This is leading to a growing demand for gastronomy tourism experiences. In addition, digitalization is helping to create new opportunities for gastronomy tourism businesses. For example, online travel agencies provide new ways for businesses to reach potential customers. Mobile apps allow companies to improve customer service and provide more personalized experiences. Moreover, VR and AR are creating new ways for businesses to showcase their products and services (Hjalager, 2022; Turgarini et al., 2021).

The role of digitalization in the development of gastronomy tourism is multifaceted. It has transformed food production, preparation, and consumption, revolutionizing marketing and customer engagement

strategies. Digitalization has opened new possibilities for businesses to connect with their target audience and has empowered tourists to explore and engage with gastronomy innovatively. Some of the critical roles of digitalization in gastronomy tourism include:

Promotion and inspiration: Social media, influencer marketing, and high-quality visuals are powerful ways to promote gastronomy tourism destinations and inspire travel for food experiences. For example, stunning photos and videos of delicious regional cuisine or craft cocktails spark curiosity and motivate people to want to visit and taste for themselves (Batat, 2021). Many gastronomy tourists get ideas and recommendations from food-focused social media accounts and blogs.

Improved trip planning: Digital tools make planning memorable culinary adventures easier for gastronomy tourists. They can research the best dining spots, make reservations, book food tours and cooking classes, create customized itineraries, and map out routes to visit specific restaurants, and markets. With all the options available, digital trip planning helps avoid missed opportunities and wasted time (Kaushal et al., 2021).

Greater convenience: Digital technologies provide comfort through features like online booking, preordering, digital tickets or vouchers, and mobile payments. Gastronomy tourists can skip lines at popular venues by reserving or preordering in advance on platforms like OpenTable or Tock and by paying through an app. They do not need to worry about making phone calls or risk experiencing "no reservation left today" disappointment upon arrival at the destination (Magano & Cunha, 2020).

More personalized experiences: Many companies can suggest personalized dining recommendations and tailor experiences to past interests and tastes using user data and preferences. Gastronomy tourists receive customized suggestions for restaurants, tours, events, and more based on their unique interests and travel history. Over time, the personalization and accuracy of these digital concierge services will keep improving (Richards, 2021).

Enhanced on-site experiences: In a destination, technologies like GPS, digital tour guides, and virtual or augmented reality can enrich the on-site gastronomy tourism experience. It is easy to find nearby points of interest or follow a self-guided food walking tour using an app with turn-by-turn directions. Virtual reality experiences let gastronomy tourists preview and learn about certain restaurants or cultural food practices without visiting in person. Moreover, augmented reality can provide interactive information about menu items, historical contexts, or food production techniques by scanning images, objects, or locations (Ekumah et al., 2020).

Facilitated sharing and storytelling: Digital platforms make it simple for gastronomy tourists to share stories, photos, and videos of their food and travel adventures—during and after a trip. They can post real-time updates on social media, write blog posts or reviews, create photo journals, publish video recipes or documentaries, and stay in contact with other travellers and industry professionals worldwide (Lambert & Hessler, 2018).

Improving efficiency and sustainability: Digital solutions help improve operational efficiency for tourism businesses. Automated scheduling, staffing, inventory management, and more optimize resources. Significant data insights allow for more customized experiences and predictive planning. Sustainability is enhanced through reduced waste, better demand management, and the option for virtual vs. physical experiences (Hassoun et al., 2016).

This connectivity and sharing inspire new travel ideas and opportunities for collaboration or co-creation between destinations, brands, and gastronomy tourists. Overall, digital technologies and online connectivity drive innovation in gastronomy tourism and shape how gastronomy tourists discover, book, experience, share, and remember their culinary adventures. Destinations and businesses must continue adapting to capitalize on trends in increasing digitalization. However, the human connection will remain essential, as the most memorable gastronomy tourism experiences marry cutting-edge digital tools with a sense of cultural authenticity, personalized hospitality, and community. A balance of technology and human touch will characterize the future of digitally advanced gastronomy tourism.

9.3 Selected Good Practices

The role of digitalization in the development of gastronomy tourism is multifaceted. It has transformed food production, preparation, and consumption, revolutionizing marketing and customer engagement strategies. Digitalization has opened up new possibilities for businesses to connect with their target audience and has empowered tourists to explore and engage with gastronomy innovatively. Some of the selected good practices from OIC and non-OIC countries on the nexus of digitalization and gastronomy tourism are as follows:

Uzbekistan Gastronomy Tourism: Uzbek cuisine, culture, and food offer a captivating blend of flavors, traditions, and culinary heritage. Rooted in the country's position along the Silk Road, Uzbek cuisine showcases a rich tapestry of influences from Central Asia, Persia, Russia, and the Middle East. Traditional Uzbek dishes are known for their generous use of savory spices, tender meats, and fragrant rice. The centerpiece of Uzbek cuisine is the renowned dish called "plov," a flavorful rice pilaf cooked with meat, carrots, and a medley of spices. The country's culture places great emphasis on hospitality, and sharing meals with family and friends is a cherished tradition. Uzbek food is often enjoyed in communal gatherings, where feasts are served with warm bread, fresh salads, and delectable side dishes. The vibrant food scene in Uzbekistan is complemented by bustling bazaars filled with aromatic spices, dried fruits, and nuts. With its diverse flavors and culinary delights, Uzbek cuisine continues to captivate the taste buds of both locals and international visitors, making it a truly remarkable gastronomy experience (Uz Daily, 2023) (see Figure 19). Uzbekistan intensively uses digital technologies and social media to promote its offerings in gastronomy tourism.

Figure 19: Uzbek Culinary Culture

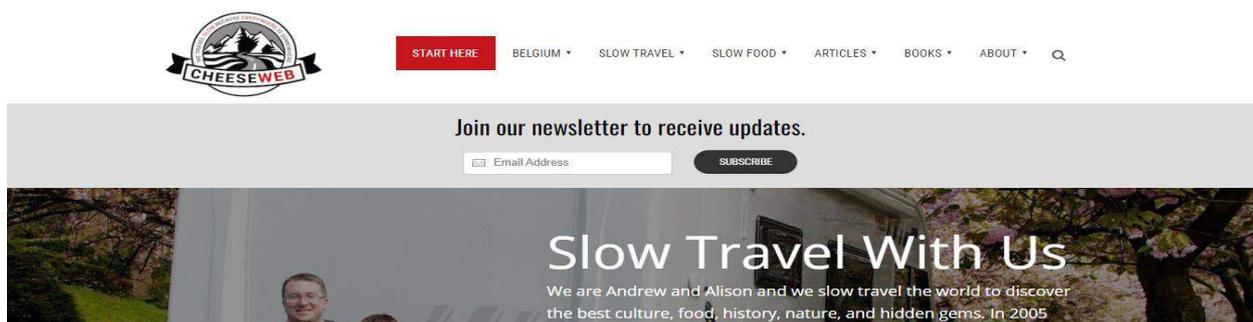


Source: *Uzbekistan Gastronomy Travel*, 2023

Iran readies roadmap for gastronomy tourism: Iranian cuisine is a delightful fusion of flavours, aromas, and textures that reflects the country's rich cultural heritage. Each province and city in Iran has its own distinct culinary traditions, offering a wide range of delectable dishes to satisfy every food lover's palate. The cornerstone of Persian meals is rice or Polo, accompanied by an array of balanced tastes and flavours, including sweet and sour, soft and crunchy, cooked and raw, and hot and cold elements. Fresh herbs are an essential component of every Iranian meal, with sabzi-khordan, a basket of herbs, radishes, and scallions, gracing every table. The cuisine highlights freshness, deliciousness, and vibrant colors, creating a feast for both the eyes and the taste buds. Iranian cuisine is not only a celebration of gastronomy but also an integral part of the country's culture, showcasing the importance of food in bringing people together and fostering a sense of community (Oktay & Sadıkoğlu, 2018; Tehran Times, 2023).

Visit Flanders "CheeseWeb" campaign: To promote the Flanders region of Belgium as a gastronomy tourism destination, Visit Flanders created an interactive digital marketing campaign centered around Belgian cheese. They enlisted influencers to share engaging social media content. They built the CheeseWeb (2023) microsite, which allowed visitors to view cheese stories on a map of Flanders, save points of interest, and share wish lists. The campaign combined storytelling, stunning visuals, personalization, and social sharing to inspire gastronomy tourism to Flanders (see Figure 20).

Figure 20: Cheeseweb Initiative of Flanders (Belgium)

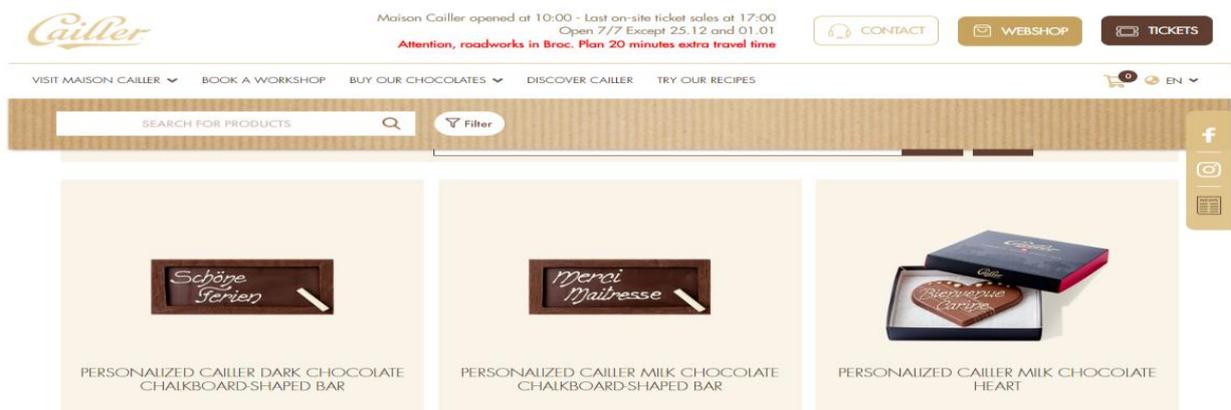


Source: CheeseWeb, 2023

Regions of Taste Augmented Reality Experience: Destinate One proposed an augmented reality app experience for gastronomy tourists to the Regions of Taste in Croatia. At different points of interest like restaurants, farms, and markets, visitors would use the app to access augmented reality content on regional cuisine, cooking techniques, and the origin of products. The immersive digital experience enhances on-site learning and connection to the local food culture. Concepts like this show the potential for augmented reality to enrich gastronomy tourism (Crofton et al., 2019; Wang et al., 2021).

Cailler Digital Factory Visit: Swiss chocolatier Cailler (2023) (part of Nestlé) offers an innovative digital factory visit experience in their visitor center. Using virtual reality headsets, visitors can take a virtual tour of the production facility with a guide, see how chocolates and other products are made, and go behind the scenes in ways impossible on a traditional factory tour. Combining digital technologies like virtual reality with samples of Cailler chocolates and pralines provides a multi-sensory educational experience for gastronomy tourists interested in Swiss chocolate heritage (see Figure 21).

Figure 21: Cailler Digital Factory Visit



Source: Cailler, 2023

Restaurant Mapping "Street Food" in Singapore: The Singapore Tourism Board (2023) created an interactive "Street Food" map highlighting some of the city's best hawker fares and food streets. The digital map allows gastronomy tourists to explore Singapore's vibrant street food scene by cuisine, landmark, or MRT station. Users can discover popular dishes, see photos, read descriptions, and get directions to each hawker center and stall. By mapping the street food options, STB made it easier for visitors to find these iconic casual dining experiences and for vendors to gain exposure, facilitating the overall growth of gastronomy tourism around Singaporean cuisine (see Figure 22).

Figure 22: Local Food Guide Singapore



Source: Food Panda (2023)

Augmented reality dining experiences: Some restaurants now offer augmented reality dining experiences where people use AR headsets to enhance their meals. For example, the Dragonfly restaurant in Bangkok lets diners enjoy their meal surrounded by life-size virtual animals and fantasy creatures. The AR adds a layer of visual entertainment and whimsy to the dining experience (Batat, 2021).

Virtual culinary tours: Companies like Spoon and Corkscrew offer virtual live-streamed tours that provide an interactive way to explore food regions from anywhere. Participants can see destinations, learn about culinary traditions, watch cooking demos, and even enjoy tasting menus shipped in

advance. This is an innovative way to experience gastronomy virtually (Ruh et al., 2010).

Enabling seamless online reservations and booking: Digital platforms and online travel agencies have

Figure 23: Online Reservations and Booking



Source: Kapoor & Vij (2018)

simplified the process of making reservations and bookings for gastronomy tourism experiences. Tourists can easily browse a wide range of dining options, culinary tours, and food-related activities, compare prices and reviews, and make instant bookings from the comfort of their homes. This convenience has significantly contributed to the growth of gastronomy tourism (Kapoor & Vij, 2018) (see Figure 23).

Regenerative Tourism by Edible Adventures:

Australian company Edible Adventures offers "farm-to-table immersive food experiences" where visitors can connect to communities and learn about sustainable food systems. They incorporate digital tools like podcasts, videos, and an interactive impact map on their website to educate visitors and promote a "regenerative tourism" philosophy—travel that builds environmental, social, and economic sustainability. Their holistic approach, authentic community engagement, and leveraging of digital media to spread their message exemplify how technology and human connection can positively shape the future of gastronomy tourism (Leer, 2020).

Concluding Remarks

Digitalization has undeniably transformed the gastronomy tourism industry, offering new possibilities for businesses and enhancing the overall experience for tourists. Integrating new technologies and digital platforms has streamlined operations, personalized customer experiences, expanded destination marketing reach, and improved sustainability and authenticity in gastronomy offerings. As the gastronomy tourism landscape continues to evolve, businesses and destinations must embrace digitalization and adapt to changing consumer expectations. By leveraging innovative technologies and digital strategies, stakeholders in the gastronomy tourism industry can create memorable and immersive experiences that delight and engage tourists. However, balancing digitalization and preserving gastronomy's authenticity and cultural heritage is essential. Technology should be seen as an enabler rather than a replacement for traditional practices. The human touch, craftsmanship, and local cultural context remain necessary for creating meaningful gastronomy experiences.

Digitalization in gastronomy tourism opens up exciting opportunities for businesses, destinations, and tourists. Integrating new technologies and digital platforms has revolutionized the industry, from food production and preparation to marketing and customer experience. The selected good practices in this chapter demonstrate the successful implementation of digitalization in creating unique, immersive, and sustainable gastronomy tourism experiences. However, it is crucial to consider digitalization in gastronomy tourism carefully. While technology can enhance efficiency, personalization, and marketing reach, it should maintain the essence of gastronomy and cultural heritage. Balancing innovation with the preservation of authenticity and traditional practices is crucial to maintaining the integrity of gastronomy tourism. Furthermore, digitalization should be inclusive, ensuring that all stakeholders, including small and local businesses, can participate and benefit from technological advancements. Bridging the digital divide and providing support, resources, and training

is essential to enable more comprehensive access and adoption of digital tools in the gastronomy tourism industry.

Digitalization has also significantly impacted gastronomy tourism in OIC countries. With the increasing use of technology and social media, OIC countries can now showcase their unique culinary offerings to a global audience and attract more tourists to their destinations. Online platforms have enabled OIC countries to promote their traditional cuisines and local food businesses, previously inaccessible to international visitors. This has created new opportunities for small and medium-sized enterprises and helped preserve and promote these countries' cultural heritage. Moreover, digitalization has facilitated the creation of virtual food tourism experiences, which have become increasingly popular during the COVID-19 pandemic. These experiences have allowed individuals to learn about and experience the diverse cuisines of OIC countries from the comfort of their homes and have the potential to inspire future travel plans. However, the increasing reliance on technology has also led to concerns about the loss of personal interaction and human connection in the gastronomy tourism industry. Finding a balance between using technology and preserving traditional hospitality and cultural practices is essential. In conclusion, digitalization has opened up new opportunities for OIC countries in the gastronomy tourism industry, allowing them to showcase their unique culinary offerings to a global audience. However, it is essential to use technology to enhance, rather than detract from, the overall travel experience and to ensure that traditional cultural practices are preserved and celebrated.

Chapter 10

10. REVIEW OF EXPERIENCES OF THE SELECTED OIC COUNTRIES IN GASTRONOMY TOURISM

Gastronomy, or culinary tourism, has grown in popularity recently, attracting travellers worldwide seeking unique and authentic culinary experiences. This form of tourism revolves around exploring and enjoying a destination's local cuisine, traditional dishes, culinary practices, and food-related events. The OIC countries, which span Asia, the Arab region, and Africa, have a rich culinary heritage that offers immense potential for developing gastronomy tourism.

This chapter focuses on six selected OIC countries from three OIC subregions and delve into their experiences in gastronomy tourism. These countries have been carefully selected to reflect perspectives from different OIC subregions. The selected countries include Morocco and Qatar from the Arab region; Indonesia and Uzbekistan from Asia; and Uganda and Nigeria from Africa.

The main objective of the chapter is to examine the current situation of gastronomy tourism in each of these selected countries and to explore the initiatives they have undertaken to promote this niche type of tourism. In addition, the chapter identifies some investment opportunities in their respective culinary sectors and highlight the valuable lessons learned from their experiences. By examining the experiences of these OIC countries, the potential of gastronomy tourism as a tool for economic development, cultural preservation, and sustainable tourism practices has been highlighted. The analysis presented in this chapter also provides valuable insights and practical recommendations for policymakers, tourism practitioners, and entrepreneurs interested in harnessing the power of gastronomy tourism in OIC countries.

10.1 Nigeria

10.1.1 Analysis of the Current Situation

Nigeria is a country with a rich and diverse culinary heritage. With over 250 ethnic groups, each with its unique cuisine, there is a wide range of cuisines and foods for international travellers. From the hearty stews of the north to the seafood dishes of the coast, Nigerian food culture is vibrant (Obinna, 2022).

In addition to festivals and events, gastronomy tourism in Nigeria includes culinary tours and experiences, such as market tours, cooking classes, and food safaris. These experiences allow visitors to learn about the local ingredients and cooking techniques that go into traditional Nigerian dishes and to sample various flavours and textures.

Nigeria's cuisine reflects its diverse cultural heritage, influenced by various regions, tribes, and religions. The country is known for its spicy and flavourful dishes, including jollof rice, pounded yam, egusi soup, and suya, a popular street food made with grilled beef or chicken. Nigerian cuisine also features a variety of seafood dishes, such as pepper soup and fisherman's stew, and vegetarian options, like vegetable soup and plantain porridge (Oladokun, 2017).

10.1.2 Initiatives on Gastronomy Tourism

Gastronomy tourism is a growing industry in Nigeria, and it has the potential to generate significant economic benefits for the country. By promoting gastronomy tourism, Nigeria can attract more visitors, create jobs, and boost the local economy.

By considering its vast potential and supporting the growth momentum in the sector, the Nigerian government has invested in tourism development in recent years, and gastronomy is seen as a critical area for growth. For instance, the Nigerian Tourism Development Corporation (NTDC) has launched the Nigerian Indigenous Cuisine Project to promote the country's indigenous cuisine. The project aims to train local chefs, promote indigenous ingredients, and develop culinary tourism packages to attract tourists.

The annual Lagos International Food and Drinks Festival is another initiative to promote gastronomy tourism in Nigeria. The festival brings together food enthusiasts, chefs, and vendors worldwide to showcase their cuisine and promote culinary tourism in Nigeria.

Gastronomy tourism is also promoted in Nigeria through holding food tours and cooking classes. Tourists can be taken on a culinary journey, exploring the different regions of Nigeria and learning about the unique ingredients and cooking techniques used in each area. Cooking classes allow tourists to learn how to cook traditional Nigerian dishes and take home a part of the country's culinary heritage.

10.1.3 Investment Opportunities

Several factors make Nigeria an attractive destination for gastronomy tourism. First, the country has a wide variety of delicious and affordable food. Second, the Nigerian people are known for their warm hospitality and are always happy to share their food and culture with visitors. Third, Nigeria is a vibrant and exciting country with a lot to offer tourists from its natural beauty to its vibrant cities (Nwokorie, 2015). Some cities in Nigeria are on the radar of potential investors interested in gastronomy tourism development. These major cities and their prominent features are as follows:

- Lagos: Nigeria's largest city is a melting pot of cultures and cuisines. Visitors can find everything from traditional Nigerian food to international fare in Lagos.
- Abuja: The capital of Nigeria, Abuja is a modern city with a growing culinary scene. Visitors can find various restaurants in Abuja, from fine dining to casual eateries.
- Kano: The second largest city in Nigeria, Kano is known for its rich culinary heritage. Visitors can find a variety of traditional Hausa dishes in Kano, as well as international fare.
- Ibadan: The third largest city in Nigeria, Ibadan is a vibrant city with a diverse culinary scene. Visitors can find everything from traditional Yoruba food to international fare in Ibadan.
- Calabar: A coastal city in southeastern Nigeria, Calabar is known for its seafood. Visitors can find a variety of fresh seafood dishes in Calabar, as well as international fare.

These are just a few of Nigeria's many destinations for gastronomy tourism. With its diverse cuisine, warm hospitality, and vibrant culture, Nigeria is a country that has something to offer everyone, including visitors and investors.

Besides, several festivals and events have promoted the country's culinary heritage. For instance, the Lagos Food and Drink Festival is an annual event that attracts food enthusiasts and industry professionals from around the country and beyond. Other festivals include the Abuja Food Expo, the Ondo State International Food Festival, and the Ekiti Food and Cultural Festival. Such events also offer unique opportunities for potential investors and businesspeople to interact with each other and explore possible ideas for investment.

10.1.4 Investment Incentives

The Nigerian government recognizes tourism and hospitality, including gastronomy tourism, as important sectors for investment and economic growth. To encourage investment, several financial incentives are offered. Import duty is waived on tourism-related equipment to lower the costs of setting up operations. New hotels and tourism facilities receive tax holidays, exempting income from taxation for an initial period. Investment tax credits are also granted, allowing investors to reduce their tax liability based on qualifying expenditures. Beyond financial incentives, infrastructure support is provided for tourism zones. The government develops roads, utilities, and other basic infrastructure to stimulate investment by reducing development risks and costs in priority tourism regions (Oladokun, 2017).

10.1.5 Lessons Learned

Despite the growing interest in gastronomy tourism in Nigeria, some challenges must be addressed. One of the main challenges is infrastructure, as many local food markets and culinary destinations need more basic amenities such as clean water and sanitation facilities. There is also a need for more investment in culinary education and training to ensure that local chefs and food entrepreneurs can compete globally. Promoting culinary arts and improving accessibility of gastronomy tourism activities/festivals are also important areas that need to be addressed at the policy level.

Festivals and government-led initiatives in recent years started to pay off. This is why many potential investors in gastronomy tourism potential are interested in Nigeria.

Overall, the prospects for gastronomy tourism in Nigeria is promising given the growing number of culinary experiences and events that showcase the country's rich culinary heritage. As the industry continues to grow, there is an opportunity for Nigeria to become a key destination for food tourism in Africa and beyond (Figure 24).

Figure 24: Traditional Ogbono Soup (Mango Seed Soup)



Source: African Plate (2023)

10.2 Uganda

10.2.1 Analysis of the Current Situation

Uganda, located in East Africa, has a rich and diverse culinary heritage closely linked to its cultural traditions and natural resources. The country is known for its fresh and flavourful ingredients, including tropical fruits, vegetables, grains, and various meats (Ahebwa et al., 2016).

Gastronomy tourism in Uganda is still developing, but there is a growing interest in showcasing the country's traditional cuisine and culinary experiences to international visitors. Ugandan food culture uses locally sourced ingredients and traditional cooking techniques (Tibanyenda, 2019).

Uganda's traditional cuisine includes matooke (green bananas), sweet potatoes, cassava, millet, and sorghum. These ingredients form the basis of many traditional dishes, including matoke (steamed green bananas), luwombo (meat or chicken stew cooked in banana leaves), and Katogo (a dish made with a combination of matooke, heart, and vegetables) (Asada, 2019).

Uganda is also known for its vibrant street food culture, with popular snacks such as Rolex (a rolled chapati filled with eggs and vegetables), samosas, and mandazi (East African doughnuts). The country also offers a range of beverages, including local brews such as banana and potent waragi (Asada, 2019).

Culinary tourism is a growing trend in Uganda and an important source of income for the country. The government of Uganda is committed to promoting gastro tourism and is working to develop the country's culinary tourism infrastructure. In addition to its vibrant street food culture, Uganda is also home to a growing number of restaurants that offer more upscale dining experiences. These restaurants offer a variety of cuisines, from traditional Ugandan fare to international dishes. In recent years, there has been a growing interest in gastronomic tourism in Uganda. This is partly due to the country's rich culinary heritage and the increasing availability of quality restaurants.

According to the WTTC (2023), gastro tourism accounted for 10% of all tourism revenues in Uganda in 2019. This means that gastro tourism generated an estimated \$ 175 million in revenue for Uganda in 2019. The WTTC also estimates that gastro tourism will continue to grow in Uganda in the coming years. By 2023, gastro tourism is expected to account for 12% of all tourism revenues in Uganda, generating an estimated \$ 225 million in revenue. There are currently over 1,000 restaurants in Uganda, and this number is expected to grow in the coming years. The majority of these restaurants are located in Kampala, Entebbe and Jinja. However, there are also a growing number of restaurants in other parts of the country, such as Murchison Falls National Park and Lake Mburo National Park (WTTC, 2023; UNWTO, 2023; Tripadvisor, 2023).

Uganda's traditional foods and drinks offer a diverse and flavourful culinary experience. Some notable conventional dishes include (Chef, 2023; Uganda Live, 2023; Uganda Foods, 2023):

Matoke: Steamed green bananas, often served with a meat stew or groundnut sauce.

Luwombo: A traditional Ugandan dish prepared by cooking meat, chicken, or fish in banana leaves with a rich and aromatic sauce made from groundnuts (peanuts) or sesame seeds. It is usually served with matooke (steamed green bananas) or rice.

Katogo: A popular Ugandan dish consisting of a combination of matooke (green bananas), meat (such as beef, chicken, or innards), and vegetables, all cooked together in a flavourful broth.

Rolex: A popular Ugandan street food, a Rolex is a rolled chapati filled with eggs, vegetables (such as cabbage, tomatoes, and onions), and sometimes minced meat. It is a quick and filling snack, often eaten for breakfast or lunch (Figure 25).

Samosas: A typical snack in Uganda, samosas are deep-fried pastries filled with savoury ingredients such as spiced minced meat, vegetables, or lentils. They are usually served with chutney or tomato sauce.

Mandazi: A popular East African treat, mandazi are sweet, deep-fried doughnuts. They are often eaten with tea for breakfast or as a snack.

In addition to traditional foods, Uganda offers several traditional beverages, including.

Bushera: Bushera is a traditional Ugandan fermented drink made from millet or sorghum. It is a nutritious beverage that is slightly sour and often consumed as a refreshing drink or used as a base for porridge.

These traditional dishes and beverages offer visitors a taste of Uganda's culinary heritage and provide a unique and authentic gastronomy experience.

Figure 25: Uganda Rolex



Source: Matador Network (2023)

10.2.2 Initiatives on Gastronomy Tourism

In recent years, Uganda has exerted efforts to promote gastronomy tourism and highlight its culinary heritage to be an attractive destination in the region. In collaboration with tourism bodies and local communities, the Ugandan government has initiated several projects and events to attract tourists interested in experiencing Ugandan cuisine (Rogerson, 2012).

The Uganda Tourism Board (UTB) Strategic Plan 2022-2025 focuses on the promotion of culinary tourism in Uganda. It recognizes Uganda as a country of diverse culinary delights and aims to develop the country's gastronomy sector. The plan highlights key actions, including the creation of a culinary tourism route, the establishment of a culinary tourism website, and training for tourism operators. The UTB also plans to work with the government to formulate a national gastronomy policy. Uganda offers a wide range of cuisines, including traditional Ugandan dishes, international fare and fusion cuisine. Popular dishes such as rolex (a rolled chapati with eggs and vegetables), samosas, and mandazi (East African doughnuts) showcase the culinary diversity. In addition, local beverages such as banana

and waragi add to the gastronomic experience. Culinary tourism is growing in importance in Uganda and serves as an important source of revenue for the country. UTB is committed to promoting this form of tourism and is actively supporting the development of Uganda's culinary tourism infrastructure (UTB, 2020).

One notable initiative is the Pearl of Africa Tourism Expo, an annual event that showcases various aspects of Uganda's tourism, including gastronomy. The expo brings together local food producers, chefs, and hospitality industry stakeholders to promote Ugandan cuisine and culinary tourism (Sun et al., 2012).

There are also community-based tourism initiatives that aim to empower local communities by showcasing their traditional culinary practices. These initiatives include cultural tours, village visits, and cooking demonstrations that allow tourists to engage with local communities and experience their traditional foods and beverages firsthand (Victurine, 2000).

The Uganda Hotel & Tourism Training Institute (UHTTI) is a well-established government institution offering a variety of courses in hospitality and tourism. Established in 1964, UHTTI is highly regarded in Uganda for providing quality education and training to prepare students for careers in the industry. Located in Jinja, Uganda, with a satellite campus in Entebbe, UHTTI offers diploma, certificate and short-term courses. The curriculum covers essential topics such as food and beverage service, hotel management, tourism marketing and event planning (UHTTI, 2023).

10.2.3 Investment Opportunities

Uganda offers compelling investment opportunities in gastronomic tourism, with several cities and regions offering great potential for development. The country's rich culinary heritage, coupled with its abundant natural resources, creates a favourable environment for investors looking to venture into this sector. By capitalizing on Uganda's unique gastronomic offerings, investors can establish a variety of culinary tourism businesses, such as restaurants, cooking schools, and food tours (Hjalager, 2020).

To maximize investment potential, it is important to focus on authentic Ugandan dining experiences that showcase traditional dishes made with locally sourced ingredients. By highlighting the country's unique flavours and culinary traditions, investors can capitalize on the growing interest in Ugandan cuisine, both domestically and internationally. This can be achieved by establishing restaurants that specialize in Ugandan cuisine, providing tourists and locals with an immersive and memorable dining experience. In addition, cooking schools can be established to offer classes and workshops on Ugandan cooking techniques, allowing visitors to learn about and appreciate the local culinary culture (Muyanjanja et al., 2011).

In addition to restaurants and cookery schools, there is also great potential for organizing food tours in Uganda. These tours can take visitors on a gastronomic journey, introducing them to different regions known for their specific culinary specialties. For example, the cities of Kampala and Entebbe, as well as regions such as Jinja and Fort Portal, have vibrant food scenes with a wide range of local delicacies to discover. By curating guided food tours that explore these culinary hotspots, investors can tap into the growing demand for unique and authentic gastronomic experiences (Ayo et al., 2012).

Uganda's production of cocoa, coffee, and tea provides additional opportunities for investment in food tourism. Organizing nature tastings and gastro parties in the lush gardens where these products are grown can provide an immersive experience for visitors, showcasing the journey from farm to

table. By highlighting the quality and distinctive flavours of Ugandan coffee, tea, and cocoa, investors can attract coffee lovers, tea connoisseurs, and chocolate lovers, contributing to the growth of gastronomy tourism in the country (Seninde et al., 2020).

To enhance the culinary tourism offering, combining it with safari tourism can create a unique and attractive proposition for investors. By offering packages that combine wildlife safaris with gastronomic experiences, such as gourmet bush dinners or food-themed safaris, investors can cater to travellers seeking diverse and enriching experiences. This integration of safari and gastronomic tourism allows for the expansion of service offerings, attracting a broader range of tourists and increasing the overall appeal of Uganda as a destination (Sente et al., 2022).

To ensure sustainability and maximize the potential of Uganda's food tourism industry, it is critical to work closely with local communities and food producers. By establishing partnerships and creating sustainable supply chains, investors can support local farmers and food artisans while ensuring a consistent and high-quality supply of ingredients for their businesses. In addition, investing in the promotion and marketing of Ugandan cuisine, both domestically and internationally, can help raise awareness and visibility of Ugandan food products, further driving the growth of gastronomy tourism (Charos, 2023).

10.2.4 Investment Incentives

Uganda aims to attract foreign direct investment (FDI) in tourism through strategic financial incentives. Tax holidays exempt income from taxation for a set time period, similar to the approach in Nigeria. Additional deductions are permitted on income generated from tourism sector activities. Import duties are exempted for tourism businesses, lowering input costs. Uganda complements these fiscal incentives with efforts to develop enabling tourism infrastructure. Special economic zones dedicated to tourism are being established with the necessary utilities and transportation links. The government also supports tourism workforce training and joint marketing programs to boost the overall enabling environment for investors (Muyanja et al., 2011).

10.2.5 Lessons Learned

As gastronomy tourism continues to develop in Uganda, several lessons can be learned to foster its growth and success. Investment in infrastructure and amenities is critical to supporting the development of gastronomy tourism. This includes improving roads, transportation networks, and sanitation facilities to facilitate access to culinary destinations and ensure a positive visitor experience.

Collaboration between government, tourism organizations, local communities, and private sector stakeholders is essential. By working together, these entities can develop comprehensive strategies, promote cultural preservation, and create an enabling environment for the growth of gastronomy tourism. Capacity building and training programs should be prioritized to enhance the culinary skills of local chefs and food entrepreneurs. This will ensure the delivery of quality dining experiences that showcase the unique flavours of Ugandan cuisine.

The Uganda Hotel & Tourism Training Institute (UHTTI) is dedicated to addressing the issue of human capacity development in the hospitality and tourism industry in Uganda. By providing quality education and training, UHTTI aims to equip students with the necessary skills and knowledge to excel in their careers. Through its curriculum and co-curricular activities, UHTTI provides a comprehensive learning experience and promotes networking opportunities for students to further enhance their professional growth and connections within the industry (UHTTI, 2023). The establishment of such as

a dedicated institute is the reflection of a long- term plan that aims to develop tourism in Uganda through investing in human capital.

10.3 Morocco

10.3.1 Analysis of the Current Situation

Morocco, a country in the Arab region of the OIC, has a thriving gastronomy tourism industry. Moroccan cuisine is known for its rich flavours, aromatic spices, and diverse dishes influenced by different cultures, including Arab, Berber, and Mediterranean (James, 2023). The country's gastronomy tourism industry offers visitors a wide range of experiences. From exploring the bustling food markets, known as souks, to tasting traditional Moroccan dishes at local restaurants and street stalls, tourists can immerse themselves in the country's culinary traditions (Fayziyeva & Ruziev, 2022).

Moroccan cuisine is characterized by its bold and aromatic flavours, often incorporating spices such as cumin, saffron, and cinnamon. Traditional dishes include tagine (slow-cooked stews), couscous, pastilla (a savoury pastry), and harira (a hearty soup) (Khan, 2017: 14). Mint tea, known as "Moroccan tea," is a popular traditional drink often served with meals (James, 2023). Morocco is famous for its iconic dishes such as tagine, couscous, and pastilla. Tagine is a slow-cooked stew typically made with meat or vegetables and flavoured with spices. Couscous, a staple of Moroccan cuisine, is made from semolina grains and served with various flavourful toppings. Pastilla is a sweet and savoury pastry filled with layers of spiced meat, almonds, and eggs (Welch, 2009).

Moroccan cuisine is a significant attraction for tourists, contributing approximately 10% of all tourism revenue in Morocco. In 2019, gastronomy tourism is estimated to account for 10% of Morocco's tourism revenue. The country boasts over 10,000 restaurants, with a majority located in major cities like Marrakech, Fez, and Casablanca (WTTC, 2023; UNWTO, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

There is a very good image of the country's gastronomy tourism among international travellers. 73% of respondents in a survey conducted with international tourists who have been in Morocco have a positive image about the Moroccan gastronomy. Besides, 50.5% of respondents who have never visited Morocco mentioned having a positive image. The most popular Moroccan dishes among tourists are couscous, tagines and harira. Experiencing Moroccan cuisine in restaurants is the most likely option for tourists, but they also enjoy tasting local dishes in markets and street stalls. They appreciate the diversity of Moroccan cuisine, influenced by various cultures. Tourists also find Moroccan cuisine affordable and delicious (El Hafid et al., 2018).

Recognizing the importance of gastro tourism, the Moroccan government is actively promoting its development and enhancing the country's culinary tourism infrastructure. Part of this effort includes the creation of gastro tourism trails, allowing visitors to explore the diverse culinary landscape of Morocco. According to the World Travel & Tourism Council's 2019 estimation, gastro tourism contributed \$1.5 billion to the country's tourism revenue. The number of tourists visiting Morocco for gastro tourism purposes is projected to grow by 5% annually in the coming years. The Moroccan government aims to achieve \$2 billion in tourism revenue from gastro tourism by 2025 (WTTC, 2023; UNWTO, 2023).

These traditional foods and drinks offer a glimpse into Morocco's rich culinary heritage and are an essential part of the gastronomy tourism experience in the country.

These traditional foods and drinks offer a glimpse into Morocco's rich culinary heritage and are an essential part of the gastronomy tourism experience in the country (Tourisme, 2023). Morocco is famous for its traditional food and drink. Some iconic Moroccan dishes include:

Tagine: A slow-cooked stew typically made with meat (such as lamb or chicken), vegetables, and spices. It is named for the clay pot in which it is cooked (see Figure 26).

Couscous: A staple dish made from semolina grains, typically served with a savory vegetable or meat stew.

Pastilla: A savory pastry filled with shredded chicken, almonds, spices, and a hint of sweetness from powdered sugar and cinnamon. It is often served as an appetizer or main dish on special occasions.

Harira: A hearty soup made with tomatoes, lentils, chickpeas, and aromatic spices. It is traditionally served during Ramadan to break the fast.

Moroccan Mint Tea: Also known as "Maghrebi tea" or "Moroccan tea," this traditional drink is made with green tea leaves, fresh mint leaves, and sugar. It is a symbol of hospitality and is typically served throughout the day.

Moroccan pastries: Morocco is known for its exquisite pastries such as baklava, chebakia, and gazelle horns. These sweet treats feature delicate layers of pastry, nuts, and honey and are often enjoyed with a cup of mint tea.

Figure 26: Moroccan Chicken Tagine with Olives and Preserved Lemons



Source: *The Spruce Eats* (2023)

10.3.2 Initiatives on Gastronomy Tourism

The Moroccan government has acknowledged the importance of gastronomy tourism and has taken several initiatives to promote and develop the sector. The Ministry of Tourism, Air Transport, Handicrafts, and Social Economy has actively promoted Moroccan cuisine as a tourist attraction. Morocco has recognized the potential of gastronomy tourism and has taken various initiatives to promote its culinary offerings. The country has actively participated in many international food festivals and events, showcasing its cuisine to a global audience (Welch, 2009).

One notable initiative of Morocco is the annual Marrakech Food and Beverage Festival, which brings together local and international chefs, food experts, and enthusiasts (see Figure 27). The festival celebrates Moroccan cuisine and showcases the country's culinary traditions through cooking demonstrations, tastings, and cultural performances (Morocco National Tourist Office, 2023).

Another important initiative is the "Taste of Morocco" campaign launched by the Moroccan National Tourist Office. This campaign aims to position Morocco as a leading gastronomy tourism destination by highlighting the country's culinary diversity, unique flavors, and dining experiences (Morocco National Tourist Office, 2023).

In addition, Moroccan cooking classes and food tours have become increasingly popular with tourists. These experiences offer visitors the opportunity to learn about Moroccan cooking techniques, traditional recipes, and the cultural significance of food (James, 2023). One notable initiative is the "Morocco Gastronomy Tour," which highlights the country's culinary heritage. This tour allows visitors to discover traditional food markets, participate in cooking classes and taste authentic Moroccan dishes. The aim is to provide an immersive experience showcasing Moroccan gastronomy's diversity and richness (Khan, 2017). Additionally, Morocco hosts several food festivals and events throughout the year. The Marrakesh Food Festival and the Fes Festival of Gastronomy are prominent events that celebrate Moroccan cuisine, bringing together local and international chefs, food enthusiasts, and tourists (Fayziyeva & Ruziev, 2022).

Figure 27: Marrakech Food and Beverage Festival



Source: Morocco Go Now (2023)

10.3.3 Investment Opportunities

Morocco offers attractive investment opportunities in the gastronomy tourism sector. The country's unique culinary heritage and growing tourist interest create a favorable environment for investment. Morocco offers attractive investment opportunities in the gastronomy tourism sector. The country's rich culinary heritage and increasing popularity among tourists create a suitable environment for investment (James, 2023).

Investors can explore opportunities to establish or partner with traditional restaurants, cooking schools, and food tour operators. Investing in infrastructure development, such as upgrading food markets and dining facilities, can enhance the overall gastronomy tourism experience (Khan, 2017). There are also opportunities to invest in producing and exporting Moroccan spices, herbs, and traditional foods. Moroccan cuisine has gained international recognition, and there is a demand for authentic Moroccan ingredients and products in global markets (Fayziyeva & Ruziev, 2022).

The Framework Agreement of the Strategic Tourism Roadmap 2023-2026 outlines several ambitious goals for the development of tourism in Morocco. These include attracting 17.5 million tourists and generating \$120 billion in revenues by 2026. One of the main pillars of the roadmap is to promote and increase investment in the tourism sector. The Moroccan government has committed \$6.1 billion in

funding for the roadmap, while also encouraging private investment. In addition, the roadmap highlights the importance of digitalization in the tourism sector. The government is committed to improving Morocco's digital infrastructure and facilitating online travel and accommodation bookings. Overall, the framework agreement of the 2023-2026 Tourism Strategic Roadmap is an important document that reflects the Moroccan government's vision for the future of tourism in the country (Maroc, 2023). This plan can also help to boost investments in gastronomy tourism and can pave the way for increased offerings in this emerging tourism segment in the country.

10.3.4 Investment Incentives

Morocco deploys a blended approach of subsidies, tax reductions, customs exemptions, and other non-financial incentives to attract tourism investment. Capital costs are lowered through subsidies and grants for qualified projects. Tax incentives exempt a portion of profits from taxation. Customs duties are exempted on imported equipment and materials. Free land is also provided in strategic locations. Further, Morocco has established 12 free trade zones exclusively focused on tourism development. These zones provide enhanced custom duty and tax exemptions to approved investors located within. Soft loans at below-market rates supplement the incentives package.

10.3.5 Lessons Learned

Morocco's experience in gastronomy tourism offers valuable lessons for the development of the industry. One key lesson is the importance of preserving and promoting culinary traditions. The country has showcased its unique culinary heritage by celebrating traditional recipes, ingredients, and cooking techniques. Maintaining authenticity and cultural integrity in gastronomy tourism experiences is essential to attracting and retaining visitors.

Another lesson is the importance of collaboration and partnerships. Morocco has actively engaged local chefs, food experts, and tourism stakeholders to promote its gastronomy. Associations linking the government, private sector, and local communities can contribute to the industry's sustainable growth. In addition, investment in culinary education and training is critical to ensuring the availability of skilled professionals in the hospitality sector. Morocco has improved the quality of its gastronomy tourism offerings by providing opportunities for aspiring chefs and culinary entrepreneurs to develop their skills. Lastly, Morocco has achieved to promote its culinary tourism by using various online and offline channels around the globe. Moroccans living abroad also contributed to the promotion of rich cuisine and many international tourists showed interest to taste the unique culinary offerings of Morocco by visiting the country.

10.4 Qatar

10.4.1 Analysis of the Current Situation

Qatar, a country situated in the Arab region, has been experiencing rapid growth in its gastronomy tourism industry. Qatar's cuisine has been influenced by its geographical location and cultural diversity, blending traditional Qatari dishes and international flavours (Henderson, 2009). The country's capital, Doha, is at the forefront of Qatar's gastronomy tourism scene. It has various restaurants, from high-end fine dining establishments to local eateries serving traditional Qatari cuisine. The city's culinary landscape has recently expanded, attracting locals and tourists eager to explore its vibrant food culture (Lock, 2019).

Qatar's food tourism is wider than restaurants. The country hosts festivals and events to celebrate its culinary heritage and showcase international cuisines. These events attract food enthusiasts and allow

visitors to immerse themselves in Qatari cuisine's rich flavours and aromas (Abdallah & AlMaadheed, 2021). Qatari cuisine is known for its rich flavours, aromatic spices, and emphasis on fresh ingredients. Traditional dishes include machbous (spiced rice with meat or fish), harees (wheat and meat porridge), and balaleet (sweet vermicelli with saffron and cardamom). In addition, Qatar offers a wide range of international cuisines, with restaurants serving dishes from around the world (Basan, 2006; Savvaidis et al., 2022).

Qatar's tourism industry has proliferated recently, with visitors increasing by 50% between 2014 and 2019 (Qatar Tourism Authority, 2020). Qatar aims to attract over 6 million visitors annually by 2030, mainly promoting niche tourism segments like gastronomy tourism (General Secretariat for Development Planning, 2018). The rise of gastronomy tourism in Qatar can be attributed to several factors. First, the Qatari government has invested in promoting the country as a culinary destination, recognizing the sector's economic potential. Secondly, the country has seen significant growth in the hospitality industry by establishing luxury hotels and fine-dining restaurants. This has further enhanced the gastronomy tourism experience in Qatar (Kivela & Crofts, 2006).

The FIFA 2022 World Cup in Qatar was a significant event that increased awareness of the country's tourism offerings and gastronomy. By attracting a total of 3.4 million football fans, the tournament provided many people the opportunity to stay in Qatar for several days or weeks before or after the event. This gave them the opportunity to experience Qatar's rich culture and cuisine. Many visitors were impressed with what they discovered. The FIFA Fan Festival in Doha was also highly successful. The festival attracted 1.8 million attendees and offered various activities, such as food stalls, live music, and cultural performances. The festival provided an enjoyable and festive atmosphere for attendees to experience Qatari culture and cuisine. Hosting the FIFA World Cup 2022 offered Qatar an occasion to present itself as a tourist destination. The tournament drew numerous visitors from around the world, many of whom were impressed with the event. This marks a favourable development for Qatar's tourism industry and is expected to boost the number of tourists visiting the country in the coming years (FIFA, 2022).

Qatar boasts several traditional dishes and beverages that reflect its cultural heritage. Some famous examples include (Al-Naemi & Chalcraft, 2014; Visit Qatar, 2023):

Machbous: A spiced rice dish with meat (typically chicken, lamb, or fish) accompanied by vegetables and nuts. It is a staple of Qatari cuisine.

Harees: A slow-cooked dish of wheat and meat (often chicken or lamb). It has a porridge-like consistency and is traditionally eaten during the Holy month of Ramadan.

Balaleet: A sweet and savory dish of vermicelli noodles with saffron, cardamom, and sugar. It is often served with a generous portion of scrambled eggs.

Majboos: Like machbous, majboos is a spiced rice dish cooked with meat (usually chicken or lamb), vegetables, and aromatic spices (see Figure 28).

Khanfaroush: A traditional Qatari pancake made with flour, sugar, saffron, and rose water. It is usually served with a drizzle of honey or date syrup.

Karak Tea: A popular hot beverage in Qatar, Karak Tea is a solid and sweet spiced tea made with black tea, milk, sugar, and spices such as cardamom and saffron.

Laban: A refreshing and cooling yogurt-based drink often enjoyed with meals or as a thirst quencher on hot days.

These traditional Qatari dishes and beverages contribute to the country's gastronomy tourism offerings, allowing visitors to enjoy Qatar's unique flavors and culinary traditions. Qatar's gastronomy tourism industry is thriving, with a diverse culinary scene, initiatives to promote local cuisine, and investment opportunities for entrepreneurs. By preserving its cultural heritage, working with local communities, and continuing to develop its infrastructure, Qatar can further strengthen its position as a desirable gastronomy tourism destination and provide visitors with a memorable and immersive culinary experience.

Figure 28: Qatar Majboos



Source: Dreamstime (2023)

10.4.2 Initiatives on Gastronomy Tourism

The Qatari government recognizes the importance of gastronomy tourism as a driver of economic growth and cultural exchange. As a result, several initiatives have been launched to promote Qatar's culinary offerings:

- Qatar National Tourism Council (QNTC): The QNTC actively promotes gastronomy tourism and showcases Qatar's culinary heritage. It works with local restaurants, chefs, and culinary experts to create unique visitor dining experiences;

- Qatar International Food Festival: This annual event brings renowned chefs, food vendors, and enthusiasts worldwide to showcase their culinary skills and diverse cuisines (Figure 29). It provides a platform to promote food tourism and introduce visitors to the culinary delights of Qatar;

- Souq Waqif (2023): In the heart of Doha, Souq Waqif is a traditional marketplace offering a wide range of Qatari dishes and local delicacies. It serves as a popular gastronomy attraction, allowing visitors to sample authentic Qatari cuisine while immersing themselves in the vibrant atmosphere of the souq.

In addition, Qatar has focused on developing its local food scene by supporting local food businesses and promoting Qatari cuisine. The government has launched programs and initiatives to encourage entrepreneurship in the food industry, providing opportunities for local chefs and food entrepreneurs to showcase their skills and creations.

Figure 29: Qatar International Food Festival Logo

Source: Qatar Tourism (2023)

In its National Tourism Sector Strategy 2030, Qatar has identified hospitality tourism as a critical component in supporting the growth of its tourism industry. It emphasizes that gastronomic tourism can contribute significantly to Qatar's tourism sector as a means of attracting and retaining visitors. The Qatar National Tourism Sector Strategy 2030 (QNTSS, 2023) recognizes hospitality tourism as one of the key pillars of the country's tourism strategy. The QNTSS 2030 aims to establish Qatar as a renowned global culinary destination by promoting Qatari cuisine and supporting the development of the local food scene.

To encourage the development of gastronomic tourism in the country, the Qatari government has implemented several measures, including (Gulf-times, 2023):

Launching the Qatar Culinary Calendar: This year-round program consists of food-related events such as festivals, competitions and workshops, with the aim of raising awareness of Qatari cuisine and attracting visitors from around the world.

Support for local food businesses: The Qatari government provides financial and technical support to local food businesses to help them improve their products and services while expanding into new markets.

Promoting Qatari cuisine: The government promotes Qatari cuisine through various channels, including the tourism website, social media platforms, and trade fairs.

Although the development of gastronomic tourism in Qatar is still in its early stages, the government remains committed to transforming the country into a prominent global culinary destination. With its rich culinary heritage and extensive government support, Qatar is well positioned to become a major player in the global gastronomic tourism market. The tourism sector is expected to contribute 12% to Qatar's GDP by 2030 and in this growth momentum gastronomic tourism is expected to play key role.

10.4.3 Investment Opportunities

The growing hospitality tourism industry in Qatar offers several investment opportunities. Qatar's booming hospitality sector allows investors to establish restaurants, cafes, and food outlets catering to local and international visitors. Luxury hotels and resorts provide a platform to showcase high-end dining experiences and culinary events (Gharib, 2019).

Investment can also be made in culinary education and training centers to nurture local talent and enhance the culinary skills of Qatar's workforce. In addition, there is potential for investment in food

production, including organic farming and specialty foods, to meet the growing demand for high-quality and unique ingredients. Qatar's growing gastronomy tourism sector offers several investment opportunities. Potential investment areas include:

Restaurants and Cafes: Qatar's dining scene is expanding rapidly, offering opportunities to invest in new restaurants, cafes, and food outlets catering to local and international tastes (Bender & De Leon, 2018; Gregoric, 2014; Khalaf et al., 2021).

Nusret, a renowned Türk steakhouse chain, serves as a prime example of foreign direct investment (FDI) in gastronomy tourism. With restaurants in Qatar, the United Arab Emirates, and Saudi Arabia, Nusret's presence in these countries underscores the importance and promise of gastro tourism. Nusret's investments in Qatar will provide tourists with the opportunity to taste Türk cuisine, thereby contributing to the growth of tourism revenues in the country. Nusret's investment in these countries serves as a testament to how FDI can foster the development of gastro tourism. Investments made by brands like Nusret exemplify the positive impact of FDI and has the potential to attract other brands and chain-restaurants from the globe (Nurs-et, 2023).

Culinary Experiences: Investing in culinary experiences such as food tours, cooking classes, and workshops can attract tourists seeking immersive and educational food tourism experiences.

Food festivals and events: Supporting or sponsoring food festivals and events in Qatar provides exposure and branding opportunities for companies in the food tourism industry.

10.4.4 Investment Incentives

Qatar leverages tax holidays and specialized free zones to appeal to tourism investors. Income tax exemptions of up to 10 years duration are offered. Additionally, the Qatar Financial Center and Qatar Science and Technology Park offer tourism companies positioning within their bounds extra incentives on tax and customs. A unique pull factor for Qatar is the ability for full foreign ownership of companies across sectors, including tourism (Khan, 2017). Qatar offers up to 100% foreign ownership of companies and tax holidays of up to 10 years to attract FDI in tourism. It also has free zones such as Qatar Financial Center and Qatar Science and Technology Park with special incentives for tourism investors (Gharib, 2019).

10.4.5 Lessons Learned

The success of gastronomy tourism in Qatar can provide valuable lessons for further development. One lesson is the importance of cultural preservation. Qatar has successfully combined its traditional cuisine with international influences while maintaining its cultural identity. Striking a balance between preserving traditional recipes and embracing innovation is critical to maintaining authenticity while appealing to a diverse range of tourists. Qatar's gastronomy tourism industry has gained momentum, and there are lessons to be learned from its development:

Cultural preservation: Emphasizing the preservation of Qatari culinary traditions and local ingredients is critical to maintaining the authenticity and uniqueness of Qatar's gastronomy tourism offerings.

Working with local communities: Involving local communities, including chefs, home cooks, and artisans, in the development and promotion of gastronomy tourism ensures the preservation and transmission of culinary knowledge and heritage.

Infrastructure Development: Continued investment in infrastructure, such as restaurant facilities, culinary schools, and food markets, is necessary to support the growth of Qatar's gastronomy tourism industry and enhance the visitor experience.

Collaboration among Stakeholders: Another critical lesson is ensuring a successful collaboration between the government, the private sector, and local communities. Qatar's government has actively supported and collaborated with stakeholders in the hospitality tourism industry, creating an environment conducive to growth. Engaging local communities and encouraging their participation in the sector can ensure the authenticity of the gastronomy experience and promote sustainable development.

Infrastructure Development: Investing in infrastructure and amenities is essential to enhance the gastronomy tourism experience. Qatar has prioritized the development of world-class dining establishments, hotels, and entertainment facilities to cater to the needs and expectations of gastronomy tourists. This investment in infrastructure has helped position Qatar as a premier destination for food enthusiasts.

10.5. Indonesia

10.5.1 Analysis of the Current Situation

Indonesia has a vibrant and diverse gastronomy culture, offering tourists various culinary experiences (Bell, 2015). With over 17,000 islands and a population of multiple ethnic groups, each with its distinct cuisine, Indonesia's gastronomy tourism scene is rich and enticing (Indonesia Travel, 2023).

Indonesia, located in Asia, has a rich and diverse culinary heritage. It is known for its vibrant flavors, unique ingredients, and diverse regional cuisines. Indonesian cuisine reflects the country's cultural diversity, with influences from various ethnic groups and historical ties to neighbouring countries (Baldwin, 2017).

Gastronomy tourism in Indonesia thrives due to its popularity among domestic and international travellers. Indonesian cuisine offers various dishes, from street food to fine dining, providing visitors with a diverse culinary experience (Sukenti, 2014).

Each region in Indonesia has its distinct culinary specialties. The island of Bali, for example, is known for its spicy Balinese cuisine, with dishes such as sate lilit (minced meat satay) (Rianti et al., 2018). In Central Java, visitors can enjoy the famous nasi gudeg (young jackfruit stew) dish and the iconic Indonesian beverage Jammu (an herbal drink). Sumatra is known for its spicy Padang cuisine, while Sulawesi offers unique seafood dishes such as ikan bakar (grilled fish) and coto Makassar (beef soup) (Von Holzen & Arsana, 2015).

Indonesian cuisine is a blend of flavours, spices, and cooking techniques influenced by different regions and cultures. From the spicy and aromatic dishes of Padang in West Sumatra to the complex flavours of Betawi cuisine in Jakarta and the diverse street food of Yogyakarta, each region offers a unique gastronomy experience (Kubo, 2010).

Indonesia has well-developed Halal certified markets and food stuff that also makes it attractive for Muslim-Friendly Tourism. For instance, domestic Halal food market in Indonesia is estimated to be worth IDR 1,000 trillion and represents a significant opportunity to drive economic recovery in the short to medium term, especially in the post-COVID recovery. Hospitality tourism, a thriving sector in

Indonesia, contributes approximately \$20 billion annually to the country's GDP. The sector is also a major source of employment, employing approximately 10 million people. With an impressive annual growth rate of approximately 10%, the hospitality industry in Indonesia is experiencing rapid expansion (Kneks Go, 2023). This growth is attributed to several factors, including the increasing popularity of Indonesian cuisine among international tourists, the growing affluence of the Indonesian middle class who have a growing interest in exploring diverse culinary experiences, and the government's support in promoting the development of the tourism industry, including the gastro tourism sector. The positive impact of the gastronomic tourism sector on the Indonesian economy is significant. It generates billions of dollars in revenue, creates numerous employment opportunities, and contributes to overall economic growth. Beyond its economic importance, the gastro tourism sector also plays a crucial role in preserving traditional Indonesian cuisines and cooking techniques, thereby promoting Indonesian culture globally. In conclusion, the gastronomic tourism sector is a significant contributor to both Indonesia's economy and culture. With its rapid growth and continued prospects, this sector is expected to continue to flourish in the years to come (WTTC, 2023; UNWTO, 2023; Lonely Planet, 2023; The Culture Trip, 2023; CNN Travel, 2023; Tripadvisor, 2023).

Indonesia is known for its traditional foods and drinks, each with unique flavors and cultural significance. Some popular conventional dishes are (Marwa, 2015; Wikiwand, 2023):

Nasi Goreng: Indonesian fried rice cooked with various spices, typically served with a fried egg, vegetables, and meat or seafood (Figure 30).

Figure 30: Indonesia Nasi Goreng



Source: Spice Breeze (2023)

Rendang: A savory and aromatic slow-cooked meat dish, often made with beef, simmered in a rich blend of spices and coconut milk until tender.

Gado-Gado: A salad of blanched or steamed vegetables, tofu, tempeh, and boiled eggs with peanut sauce.

Satay: Skewered and grilled meat (such as chicken, beef, or lamb) marinated in a mixture of spices, served with a peanut sauce, and accompanied by rice cakes or sliced bread.

Soto: A traditional Indonesian soup made with various ingredients such as chicken, beef, or offal, flavored with spices and herbs, and served with rice or noodles.

Rujak: A refreshing fruit salad with a spicy and tangy tamarind dressing, palm sugar, and chili dressing.

Teh Tarik: A popular Indonesian pulled tea made by pouring hot tea back and forth between two containers to create a frothy texture. It is usually sweetened with condensed milk.

Es Cendol: A sweet and refreshing dessert drink with coconut milk, palm sugar, and green rice flour jelly served over crushed ice.

These are just a few examples of the rich and diverse traditional foods and beverages contributing to Indonesia's gastronomy heritage.

10.5.2 Initiatives on Gastronomy Tourism

The Indonesian government has recognized the potential of culinary tourism and has taken initiatives to promote it. One such initiative is the Wonderful Indonesia Culinary and Shopping Festival, which showcases the country's diverse cuisine and promotes culinary tourism. This festival brings culinary enthusiasts, chefs, and vendors from different regions to showcase their specialties (Soeroso & Susilo, 2014).

The government also has developed a campaign to promote the destination. In this respect, the Indonesian government launched the 'Wonderful Indonesia' slogan in 2011 to showcase the country's captivating natural beauty, vibrant cultural heritage and delicious cuisine. The Wonderful Indonesia campaign includes a series of events and activities designed to promote Indonesia as a premier tourism destination. Utilizing various platforms such as television, radio, internet and social media, the campaign effectively highlights the country's awe-inspiring landscapes, cultural diversity and culinary treasures. Thanks to the success of the "Wonderful Indonesia" campaign, the number of tourists visiting Indonesia has increased significantly. The Indonesian government is also actively using digital channels to promote the Wonderful Indonesia campaign. By managing accounts on popular platforms such as Facebook, Twitter, Instagram and YouTube, they are able to reach a wider audience and educate more people about Indonesia's stunning natural wonders, rich cultural tapestry and delicious cuisine (Fahrizal et al., 2022; Idriasih, 2016; Santoso et al., 2021).

In addition, various culinary events and festivals are organized throughout the year in different cities in Indonesia. For example, the Ubud Food Festival in Bali attracts food lovers and features cooking demonstrations, workshops, and discussions on Indonesian cuisine (Ubud Food Festival, 2023). The Jakarta Food & Fashion Festival combines culinary experiences with fashion shows, highlighting the intersection of food and culture (Jakarta Fashion & Food Festival, 2023).

The Indonesian government has recognized the significant potential of gastronomic tourism to contribute to the country's economy and culture. To support its development, the government has implemented several national strategies, including funding programs and projects aimed at preserving and promoting Indonesia's gastronomic heritage. They have also collaborated with international organizations to expand into new markets for gastronomic tourism, improve education and training in the field, and create new business opportunities (indonesiagastronomynetwork, 2023).

Harnessing the power of social media, the Indonesian government actively conducts campaigns to promote gastro tourism. These campaigns effectively showcase Indonesia's gastronomic heritage and food, attracting a greater number of tourists to the country. Gastro tourism has immense potential in the OIC countries, given their rich cultural and gastronomic heritage. By fostering cooperation among

OIC countries, they can better harness this potential and collectively promote the development of gastro tourism. To support the growth of gastro tourism in Indonesia, the country has established the Indonesia Gastro Network. This organization is dedicated to improving education and training in the field, accessing new markets, and facilitating the exchange of experience and knowledge related to gastro tourism (Indonesia Gastronomy Network, 2023).

According to Wijaya et al. (2016), international visitors are attracted to Indonesia because of its diverse cuisine, which reflects the country's rich cultural heritage. They enjoy indulging in local delicacies and immersing themselves in Indonesian culture. They also have a keen interest in discovering unique Indonesian ingredients and their use in cooking. The opportunity to meet local people while dining in authentic restaurants and cafes is very important to them. Some studies also showed that international visitors are interested in learning about the history and culture surrounding Indonesian cuisine. Above all, they want to have an authentic experience by dining at local establishments where they can interact with locals and gain insights into their culture (UNWTO, 2019; Media-Leniti, 2023).

Promoting Indonesia's diverse cuisine through initiatives such as food festivals, cookbooks and online resources are essential elements for the development of gastro tourism in Indonesia. Providing information on local restaurants and organizing culinary tours would make it easier for visitors to try Indonesian food. In addition, providing financial assistance, training and marketing support to culinary tourism businesses is crucial (UNWTO, 2019; Media-Leniti, 2023). Thanks to a wide range of initiatives in the country, gastronomy tourism in Indonesia will reach greater heights in years to come.

10.5.3 Investment Opportunities

Indonesia is a top tourist destination in Asia, known for its stunning natural beauty, rich cultural heritage, and bustling cities. These tourist attractions can also provide investment opportunities for the country. Gastronomy tourism, in particular, is an important industry that offers significant investment potential in Indonesia (Wood, 1984). Many tourists visit different parts of the country to explore traditional flavours and local cuisines. As the number of tourists continues to rise, large hotel chains are taking notice. Investing in hotels located in tourist cities, such as Bali, Jakarta, and Yogyakarta, provides growth opportunities for the sector (Hampton, 2003). Furthermore, the restaurant industry is rapidly growing in Indonesia. Tourists who appreciate culinary experiences seek out restaurants to indulge in the country's rich cuisine. This has also drawn the interest of major restaurant chains. The restaurants they plan to open in different regions of Indonesia will not only offer jobs to the local community but also satisfy the palates of tourists (Lee, 2012; Wall, 2013).

Indonesia offers promising investment opportunities in the field of gastronomy tourism. The country's growing popularity as a tourist destination, combined with the popularity of its cuisine, creates a favourable environment for investors (Manalu et al., 2023). Investment opportunities can range from established restaurants and cafes that showcase Indonesian cuisine to developing culinary tours and experiences. There is also potential for investment in food production and processing, as well as culinary education and training centres to enhance the skills of local chefs and entrepreneurs. In addition, collaboration with local communities and farmers can create opportunities for sustainable gastronomy tourism that focuses on sourcing local ingredients and promoting responsible practices (Mukmin, 2022; Rekarti & Doktoralina, 2017).

Indonesia has the largest Muslim population in the world, with 87% of the population identifying as Muslim. As a result, the country is an important market for Halal food, which is in high demand among both local and international tourists. To support the halal food industry, the Indonesian government has introduced various policies and programs aimed at increasing the number of Halal food restaurants, promoting Halal food tourism, and encouraging the overall growth of the sector. With the global Muslim population exceeding 1.8 billion and growing annually, Indonesia has a remarkable opportunity to establish itself as the leading hub for Halal food production and export worldwide. The development of the Halal food industry in Indonesia will have a significant positive impact on the country's economy by creating employment opportunities, boosting tourism revenues, increasing export potential and diversifying the economy. It will also help to attract more foreign direct investment to the country. Thus, Indonesia's halal food industry and gastronomy tourism sector can grow in parallel, and they offer a window of opportunity. (Halal Food Lifestyle in Indonesia, 2021; Ma'rifah et al., 2019).

10.5.4 Investment Incentives

Indonesia's incentives for tourism investment are aimed at lowering start-up and operational costs. Tax holidays exempt new projects from corporate income tax for an initial period. Relief is provided on import duties for qualifying capital equipment and materials. Property and land taxes are also reduced within designated tourism zones and regions. Special economic zones with complimentary infrastructure have been designated throughout the archipelago to stimulate tourism real estate and facility development through clustered investment support policies (Izzatovna, 2023).

10.5.5 Lessons Learned

Indonesia's experience in gastronomy tourism offers some valuable lessons. First, preserving and promoting traditional recipes and cooking techniques are critical to maintaining the authenticity and uniqueness of Indonesian cuisine. Supporting local communities and encouraging using traditional ingredients can help preserve culinary heritage. Second, investment in infrastructure and facilities is essential to improve the overall gastronomy tourism experience. This includes improving hygiene standards, providing clean and accessible dining areas, and enhancing culinary facilities such as cooking schools and museums. Finally, collaboration and networking among stakeholders, including government agencies, tourism boards, local communities, and private investors, is essential for developing and sustaining gastronomy tourism in Indonesia. Creating platforms for knowledge sharing, business opportunities, and policy development can further strengthen the industry.

The development of the hospitality industry in Indonesia is still in its early stages, and one of the key challenges is the limited availability of trained (certified) professionals. This shortage makes it difficult to provide tourists with quality culinary experiences. Therefore, investment in education and training programs is crucial to ensure that Indonesia's gastro tourism industry has a skilled workforce capable of providing excellent service (Tarlow, 2014).

In addition, marketing and promotion play an important role in attracting international tourists to Indonesia's gastro tourism industry. Currently, this niche market is not very well known by many global travellers, so it is essential for Indonesia to allocate additional resources to marketing and promotional campaigns by using digital and traditional channels. These efforts should primarily focus on showcasing the diverse range of Indonesian cuisine and the unique culinary experiences available in the country (Purwaningwulan et al., 2019).

Sustainability is another important aspect to consider. While gastronomic tourism can have a positive economic and cultural impact, it is important to ensure that these benefits do not come at the expense of the environment or local communities. The industry must therefore adopt sustainable practices and minimize any negative impacts. In addition, innovation is a key driver in the ever-evolving gastronomic tourism industry. Indonesia should prioritize the development of new and exciting culinary experiences and explore innovative approaches to effectively market and promote Indonesian cuisine (Hernández-Rojas & Huete Alcocer, 2021).

10.6 Uzbekistan

10.6.1 Analysis of the Current Situation

Gastronomy tourism can play a crucial role in Uzbekistan's economic development, with estimates suggesting it could generate \$1 billion in revenue for the country by 2025. Promoting sustainable gastronomy tourism is of utmost importance in Uzbekistan, ensuring the sector's growth while preserving natural resources and cultural heritage (Patterson & Turaev, 2020). Gastronomy tourism in Uzbekistan faces a number of challenges such as a limited number of trained professionals and limited infrastructure. However, the potential for gastronomy tourism in Uzbekistan is promising, positioning the country to become a leading destination for food enthusiasts in the future.

Located in Central Asia, Uzbekistan has a rich and diverse culinary heritage that attracts food tourists worldwide (Sayfutdinov et al., 2015). The country's cuisine is a fusion of various influences, including Persian, Türk, Russian, and Asian, resulting in unique and flavourful dishes (Buell et al., 2020). Uzbekistan's gastronomy tourism is characterized by its traditional food, which includes a variety of rice, meat, and vegetable dishes (Sergeevna, 2023). Some of the most famous Uzbek dishes include plov (pilaf), manti (dumplings), shashlik (grilled meat skewers), and lagman (noodle soup). Aromatic spices and herbs, such as cumin, coriander, and dill, add depth and flavour to the cuisine (Advantour, 2023; Willflyfood, 2023; The Diplomat, 2022).

Uzbekistan was recently recognized as the best country for gastronomy tourism by the World Travel Awards. The award was given in 2022 and highlights Uzbekistan's rich culinary heritage, use of fresh local ingredients, welcoming hospitality, and beautiful scenery. The government plans to further develop gastronomy tourism by promoting the country's culinary traditions, creating new tourism products, and investing in infrastructure. This recognition establishes Uzbekistan as a top destination for those interested in experiencing and exploring diverse and delicious cuisines (Komiljanova, 2022).

In 2022, Uzbekistan received the prestigious "Best Country for Gastronomy Tourism" award from the World Travel Awards, based on votes from travel professionals and consumers around the world. Similarly, in 2021, Uzbekistan received the "Best Culinary Destination" award from the International Travel & Tourism Awards, as voted by travel professionals. The Global Gastronomy Destinations Awards recognized Uzbekistan as the "Best Culinary Destination in Central Asia" in 2020, while the World Luxury Restaurant Awards recognized it as the "Best Luxury Culinary Destination" in 2019, as voted by luxury travel professionals. These esteemed awards are a testament to Uzbekistan's exceptional gastronomic tourism offerings. The country boasts a remarkable culinary heritage that blends influences from Persian, Turkish, Russian and Asian cuisines. With an abundance of delicious and authentic dishes prepared with fresh, locally sourced ingredients, Uzbekistan truly tantalizes the taste buds of visitors (Uzbekistan Travel, 2023a).

Recognizing the potential of gastronomic tourism as a significant driver of economic growth, the government of Uzbekistan is fully committed to its development. With a strong sense of hospitality, the government is actively investing in infrastructure to support and enhance the gastronomy tourism sector. Considering all these factors, it is clear that Uzbekistan has the capacity to emerge as a leading destination for gastronomy tourism in the coming years. The country's wealth of offerings, from its rich culinary heritage to the warmth and hospitality of its people, make it an enticing choice for travellers seeking an exceptional gastronomic experience (Uzbekistan Travel, 2023a;2023b).

Uzbekistan is famous for its traditional food and drinks, which are central to its gastronomy tourism. Some notable traditional dishes are (Patterson & Turaev, 2020):

Plov (pilaf): A typical Uzbek rice dish cooked with meat, vegetables, and aromatic spices. Plov is often considered the national dish of Uzbekistan (Figure 31).

Figure 31: Uzbek Plov



Source: Leelalicious (2023)

Manti: Dumplings stuffed with minced meat and onions, Traditional Uzbek cuisine is known for its unique flavors, aromatic spices, and rich dishes.

Other traditional Uzbek dishes include shashlik (grilled meat skewers), manti (dumplings stuffed with meat or vegetables), Lagman (noodle soup), and somsa (savory pastries) (Advantour, 2023; Nomadsunveiled, 2023). Uzbekistan is famous for its variety of breads, especially the round flatbread known as non.

10.6.2 Initiatives on Gastronomy Tourism

Uzbekistan has recognized the potential of gastronomy tourism and has taken initiatives to promote its culinary heritage. The government has actively supported culinary tourism development by organizing festivals, events, and initiatives that showcase Uzbekistan's traditional foods and beverages (Ibragimov et al., 2021).

One notable initiative is the "Uzbekistan Gastronomy Tourism" project, which aims to promote the country's culinary traditions and attract food lovers worldwide. The project includes culinary tours,

cooking classes, and food-related events that give tourists an immersive Uzbek gastronomy experience (Botirov et al., 2021).

The annual "O'zbekiston Sofra Festival" is a prominent event that celebrates Uzbek cuisine. During the festival, traditional dishes from different regions of Uzbekistan are showcased, allowing visitors to taste the country's diverse flavors and culinary traditions. This festival is a platform for promoting gastronomy tourism and creating opportunities for local businesses and entrepreneurs (Ashirov & Hatunoğlu, 2015).

The government of Uzbekistan has paid a special attention to international fairs, exhibitions and awards to increase international visibility of the country and has taken steps to make the tourism brand of Uzbekistan more well-known. Several international awards obtained by Uzbekistan is a reflection of such planned and coordinated actions and policies to develop tourism in Uzbekistan by unleashing the potential of niche tourism segments including culinary tourism.

10.6.3 Investment Opportunities

Uzbekistan offers attractive investment opportunities in the field of gastronomy tourism. The country's rich culinary heritage and growing popularity among international tourists create a favourable environment for investment (Fayziyeva et al., 2021; Komilova et al., 2021). Investors can explore opportunities in building and supporting culinary tourism infrastructure, such as restaurants, cooking schools, and food markets. There is also potential for investment in culinary tours, cultural experiences, and hospitality services that cater to gastronomy tourists (Akhmatkulova & Nurmatova, 2023).

The promotion of local food and beverage products is another investment opportunity. Uzbekistan's traditional beverages, such as green tea, ayran (a yogurt-based drink), and non-alcoholic beverages, such as sherbet, offer the potential for production and distribution (Sani et al., 2019). In addition, investment in the hospitality sector, including hotels and accommodation, can meet the growing demand for gastronomy tourism experiences (Izzatovna, 2023).

The recent economic reforms started in 2017 in Uzbekistan has made Uzbek economy more attractive for foreign investors. In particular, the business environment in Uzbekistan is now more favourable and offer a lot of opportunities. FDI in Uzbekistan has increased tenfold in the last six years (2017-2022). Extensive government reforms which started in 2017 have opened up the economy and are attracting foreign capital to the country (Euro News, 2023). The availability of political and economic stability in the country is another advantage that makes Uzbekistan a unique destination for potential investors like hoteliers and restaurants.

10.6.4 Investment Incentives

Uzbekistan offers a favorable tax regime, customs incentives, and regulatory support for tourism investors. The government also co-finances up to 50% of expenses for tourism infrastructure development and provides free land plots (Komilova et al., 2021). The revised version draws clearer connections between the incentives and policies described for each country and economy. Similar approaches like tax holidays and customs exemptions are noted. Unique aspects are highlighted, like Qatar's foreign ownership permissions and Indonesia's use of special economic zones. The incentives are framed within the overall strategic objectives and enabling environment being cultivated by each nation's tourism authorities.

10.6.5 Lessons Learned

Uzbekistan's experience with gastronomy tourism provides valuable lessons for further development. First, investment in infrastructure and facilities that support gastronomy tourism is essential. Improving facilities such as restaurants, markets, and cooking schools can enhance the tourist experience and contribute to the industry's growth. Second, collaboration between the government, local communities, and private sector stakeholders is critical. By working together, initiatives and events can be organized to promote Uzbekistan's culinary heritage effectively. This collaboration allows local businesses and entrepreneurs to showcase their products and services to a broader audience. Third, preserving and promoting traditional culinary practices and recipes is essential. Uzbekistan's success in gastronomy tourism lies in its ability to offer authentic and traditional dishes. It is important to preserve traditional cooking techniques, local ingredients, and cultural practices to maintain the unique identity of Uzbek cuisine. Overall, macroeconomic situation and reforms also play a great role to attract more investors. To this end, the government of Uzbekistan has made some important decisions to transform the Uzbek economy with a series of reforms. The strong political will and its implementation with concrete steps also improved the business environment and the tourism sector positively.

Concluding Remarks

The market for culinary tourism is predicted to increase from its 2019 valuation of \$1.2 trillion to \$2.1 trillion by 2027, with a compound annual growth rate (CAGR) of 9.5% from 2020 to 2027. Many OIC countries have started to reap benefits from the dynamism of this segment of tourism activities. In upcoming years, many other OIC countries are also predicted to see some significant gains from the growth momentum of the market. The expansion of gastronomy tourism in OIC member countries can be attributed to several factors as explained through six case studies in this chapter. Notably, the OIC countries' diverse culinary traditions and rich cultural flavors make a naturally strong destinations in the global gastronomy market. Besides, if the existing strengths of OIC countries could be supported via policies and initiatives, in few years many additional destinations in the OIC region could be important hubs of gastronomy tourism.

In this respect, the following factors could help to develop gastronomy tourism in OIC countries:

- Preserving culinary heritage and promoting local cuisine through food festivals, cooking shows, culinary trails etc.
- Investment in tourism infrastructure and facilities like restaurants, hotels, food markets etc.
- Partnerships between government, private sector and communities to develop the sector.
- Capacity building by training chefs, hospitality professionals, tour guides etc.
- Use of technology and digital platforms for marketing and delivering services.
- Providing a high-quality and authentic gastronomy experience to tourists.
- Adopting sustainable practices in sourcing of ingredients, food production and waste management.
- Innovation by introducing new dining concepts, experiences and fusion cuisine.
- Developing gastronomy networks and associations to facilitate cooperation.

- Participation in international food fairs, contests and awards to gain visibility.
- Offering incentives to investors as well as supporting local food businesses.
- Ensuring proper regulation, standards and certification for food safety and hygiene.

By focusing on these key elements, OIC countries can develop a robust gastronomy tourism sector that showcases their culinary heritage while also driving economic growth in a sustainable manner. The model should involve stakeholders at all levels to ensure an integrated and holistic development of this niche tourism segment.

Conclusion

Gastronomy tourism has great potential for attracting visitors and promoting economic growth in OIC countries. The case studies from Turkey, Malaysia, and Morocco illustrate how each country possesses a rich culinary heritage that serves as a significant cultural asset. To fully capitalize on gastronomy, a coordinated approach to development and promotion is necessary.

Maintaining authentic local cuisines featuring high-quality, traceable ingredients is fundamental to offering genuine culinary experiences. Tourists search for dishes prepared according to time-honored traditions using high-quality, seasonal ingredients from specific regions, as evidenced by the success of Turkish and Moroccan restaurants. Nevertheless, the preservation of culinary practices passed down over generations is jeopardized by globalization and economic pressures. Governments, chefs, and communities must unite in their efforts to sustain diverse native food cultures for future generations to appreciate.

While infrastructure varies greatly among OIC countries, targeted investments could improve the tourism experience. Turkey's top-rated restaurants and increased airport accessibility have solidified its status as a gastronomic destination. On the other hand, Malaysia is continuously developing culinary facilities and offerings. Targeted infrastructure spending on transportation, accommodations, and dining options near popular attractions could enhance Morocco's ability to meet burgeoning tourist demand and stimulate economic growth. Additionally, institutional capacity building remains a critical area for collaborative efforts. Professional development programs for local chefs, restaurateurs, farmers, and guides that cover a range of topics including customer service, culinary techniques, sustainability, and food safety can help enhance the sector's overall professionalism. Partnerships among nations can facilitate the exchange of knowledge that benefits all parties involved. Promoting female empowerment through vocational programs and small business support also advances social progress.

Strong marketing efforts constitute yet another indispensable element. By pooling resources and devising cohesive digital strategies, and participating in key food industry events, OIC members can showcase their destinations and culinary luminaries worldwide. Rigorous data collection and research serve to optimize promotional initiatives. Regional platforms linking culinary attractions across borders increase the visibility and length of visits.

Consistently improving standards regarding sustainability, sourcing, and food handling ensures the health and satisfaction of visitors. Maintaining internationally recognized protocols ensures competitiveness in global tourism. Lessons from pioneers can refine strategies to fully unlock the wealth creation potential of gastronomy through heritage protection, skills transfer, and coordinated global promotion.

In developing policies to unleash the potential of gastronomy tourism, two elements could play a significant role in the OIC region. Firstly, FDI and new investments could help OIC countries to develop necessary infrastructure and services to cater to the needs of tourists interested in culinary tourism. For instance, new FDI projects in culinary tourism could help OIC countries to host several renowned international restaurants and hotels. Secondly, effective use of digitalization and new technologies could help to promote and market their culinary offerings around the world. To this end, with careful long-term policies, OIC countries can establish new culinary destinations that celebrate their rich cultural diversity with delectable cuisine.

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