

ANNUAL
VISITOR
REPORT
2019

PUBLISHED: JULY 2020

دبي
Tourism للسياحة



CONTENTS

FOREWORD	3
SETTING THE TRAIL ON A ROAD LESS TRAVELLED	4
WORLD'S MOST VISITED TRAVEL DESTINATIONS	6
DUBAI: THE DESTINATION OF CHOICE FOR THE WORLD	7
TOURIST HOTSPOTS AND UNMISSABLE ICONS: BUCKET LIST FINDS	8
PREVIEW OF THE FUTURE GLOBAL ENTERTAINMENT HUB	9
SECTOR WIDE TRENDS	10
SETTING THE STANDARD	12
MASTERING THE SCIENCE AND ART OF NEXT GEN SOCIAL MEDIA	13
EXPLORING THE POWER OF PERSONALISED STORYTELLING	14
MOVING FROM HI-TECH TO EXPERIENCE TECH	15
AT THE HEART OF THE CAPITAL OF INTERNATIONAL BUSINESS AND COMMERCE	16
CONFIDENCE AMIDST DISRUPTION: LEADING THE BOLD NEW AGE OF TOURISM	17



FOREWORD

"We have never been, nor ever will be among those who rest on their laurels; nor those who obsess on their success; nor those who believe that the march forward will continue automatically."

- His Highness Sheikh Mohammed bin Rashid Al Maktoum,
Vice President and Prime Minister of the UAE and Ruler of Dubai

Even as the world witnessed the first Emirates Airline flight take to the skies from one sandy airstrip in 1985, the unwavering confidence, steely determination, and ambitious vision of the city and its leadership was not lost on the international community that has since, closely followed the meteoric rise of Dubai to its current global reputé across tourism, trade and business. Today, Dubai stands well and truly established as a leading international tourism destination having achieved several milestones over its relatively short history, and was 2019's fourth most visited destination according to MasterCard's Global Cities Index, welcoming 16.73 million tourists from over 233 countries around the globe.

Dubai's tourism sector has consistently surpassed global industry average growth, thanks to a synchronised, city-wide delivery model that has brought together regulatory access, immigration policy, physical infrastructure, urban spatial development, and above all - an unmistakably 'Dubai Way' service culture that embodies the spirit of the city as a welcoming host to the world. Driven by the endorsement of His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai and the mandate for Dubai to become the most-visited city in the world, Dubai Tourism has continued to relentlessly pursue its quest towards this goal, and furthering the sector's economic contribution. At the end of 2019, tourism was responsible for contributing an impressive 11.5 per cent in GDP value, Dubai's tourism sector was ranked one of 'Top 10' strongest economic share generators, according to the World Travel & Tourism Council's Cities Report 2019 - a statistic of particularly enhanced significance as we stand amidst a wholly altered context six months into 2020, where the COVID-19 pandemic has wreaked undeniable havoc on the global economy.

Since the tail-end of 2019, the travel and tourism sector has seen the impacts of the health crisis, and it has understandably been one of the most significantly disrupted industries to date. Yet, the circumstances have forced a reconsideration of a future for global tourism where the convenience of speed, simplicity of access, and assumed safety of destinations are no longer a given. Disruption is engrained in our DNA and as Dubai Tourism we have risen to every challenge from the disintermediation of the traditional travel supply chain, to the rising dominance of technology empowering the globally savvy travel audience, and social media driving the hyper-connected millennial and Generation Z travellers. With infinite possibilities to explore, and opportunities to exploit, this is our time to fuel new thinking, accelerate collaborative solution sourcing, reimagine and reshape our collective future with our stakeholders - for it is how we choose to respond, adapt and evolve today, that will set us on the path to pioneering the future of global tourism tomorrow.

As we set our sights on the next horizon, our first priority remains safeguarding our people - residents across our communities and visitors to the city. The world has witnessed the unwavering stewardship and exemplary success of the UAE Government's handling of the pandemic thus far, and that is testament to the diligence and rigour with which future protocols will be deployed to assure the health and safety of every traveller who visits Dubai. Equally, economic sustainability and industry sustenance are core to assuring continued ability of the tourism sector to drive healthy GDP value, and as such, the city has been prudent and agile to respond to the changing market realities with much-needed business stimulus to weather the short-term turbulences while gearing up for a practical restart of activities. With business across tourism, hospitality, retail, and F&B in various phases of reopening already, Dubai continues to exhibit its trademark resilience, backed by the solidarity of all public and private sector stakeholders as well as the commitment of its international partner networks, as the city gears up to welcome back millions of travellers from every corner of the world.

The 2019 Visitor Report serves to highlight Dubai's progress as the world's fourth most visited destination, surpassing all prior records in international visitor arrivals to the city. Invariably, the developments throughout 2020 will focus a kaleidoscopic lens on travel behaviours and expectations for the future. Yet, as much as things might change in the near term, we believe that the fundamentals on the human need for travel, the essential experiential gratification or the service pre-requisites, and the 'memory' value that travellers seek, will remain unchanged. What we urge the reader to discern from this report are these essential points of continued relevance and crucial learning that will serve as our foundational baseline to build on, as we look to accelerate our growth through 2021 and beyond.

As always, our most humble gratitude and deepest appreciation to all our partners, our government stakeholders, our industry stakeholders, and our loyal Dubai visitors for enabling our 2019 results - and we cannot wait to welcome the world back to our city very soon.

SETTING THE TRAIL ON A ROAD LESS TRAVELLED

Dubai welcomed 16.73 million overnight visitors in 2019, with double-digit growth in arrivals from key source markets

Dubai consolidated its reputation as the world's fourth most popular tourism destination in 2019 (according to the MasterCard Global Destination Cities Index), with the city welcoming a record 16.73 million international overnight visitors – a rise of 5.1 per cent compared to 2018.

This benchmark performance outstripped the United Nations World Tourism Organisation's (UNWTO) 3-4 per cent average growth forecast for the global tourism sector in 2019 and highlighted the city's far-reaching, global appeal.

KEY SOURCE MARKETS DEMONSTRATE RESILIENCE

Dubai's key source markets – India, the Kingdom of Saudi Arabia (KSA), the United Kingdom (UK), Oman, China and Russia – together accounted for more than seven million visitors, while nine of its top 10 source markets exceeded half a million visitors each, demonstrating the city's enduring popularity among international travellers.

India retained its ranking as Dubai's top source market, delivering almost two million arrivals in 2019.

Dubai consistently ranks among India's leading outbound tourism destinations. Its popularity in this market has been amplified by Dubai Tourism's continued investment in seasonal marketing initiatives such as the 'Monsoon' campaign, which reached more than 30 million frequent travellers in India, as well as ongoing campaigns such as the award-winning #BeMyGuest collaboration with Bollywood superstar Shah Rukh Khan – the third edition of which generated 160 million online views.

KSA cemented its position as Dubai's most important GCC source market and its second largest worldwide, delivering almost 1.6 million visitors. Dubai's status as one of the Kingdom's most popular short-break family holiday destinations was reflected in the impressive 36 per cent year-on-year increase in Saudi nationals who visited the city during Eid Al Adha, Eid Al Fitr and the KSA National Day holidays.

Despite the continued economic uncertainty surrounding Brexit, the UK delivered 1.2 million visitors to Dubai in 2019, reaffirming its status as the city's third-largest tourism source market. Twelve per cent of UK travellers to Dubai last year had visited the emirate at least once during the 12 months

prior, while nine per cent confirmed their purpose of visit was seeing friends or family.

The UK's consistent performance proves the effectiveness of Dubai Tourism's targeted 'always on' campaigns including seasonal initiatives and promotions, industry engagements and strategic destination partnerships with key industry stakeholders, media publishers and digital networks in the country.

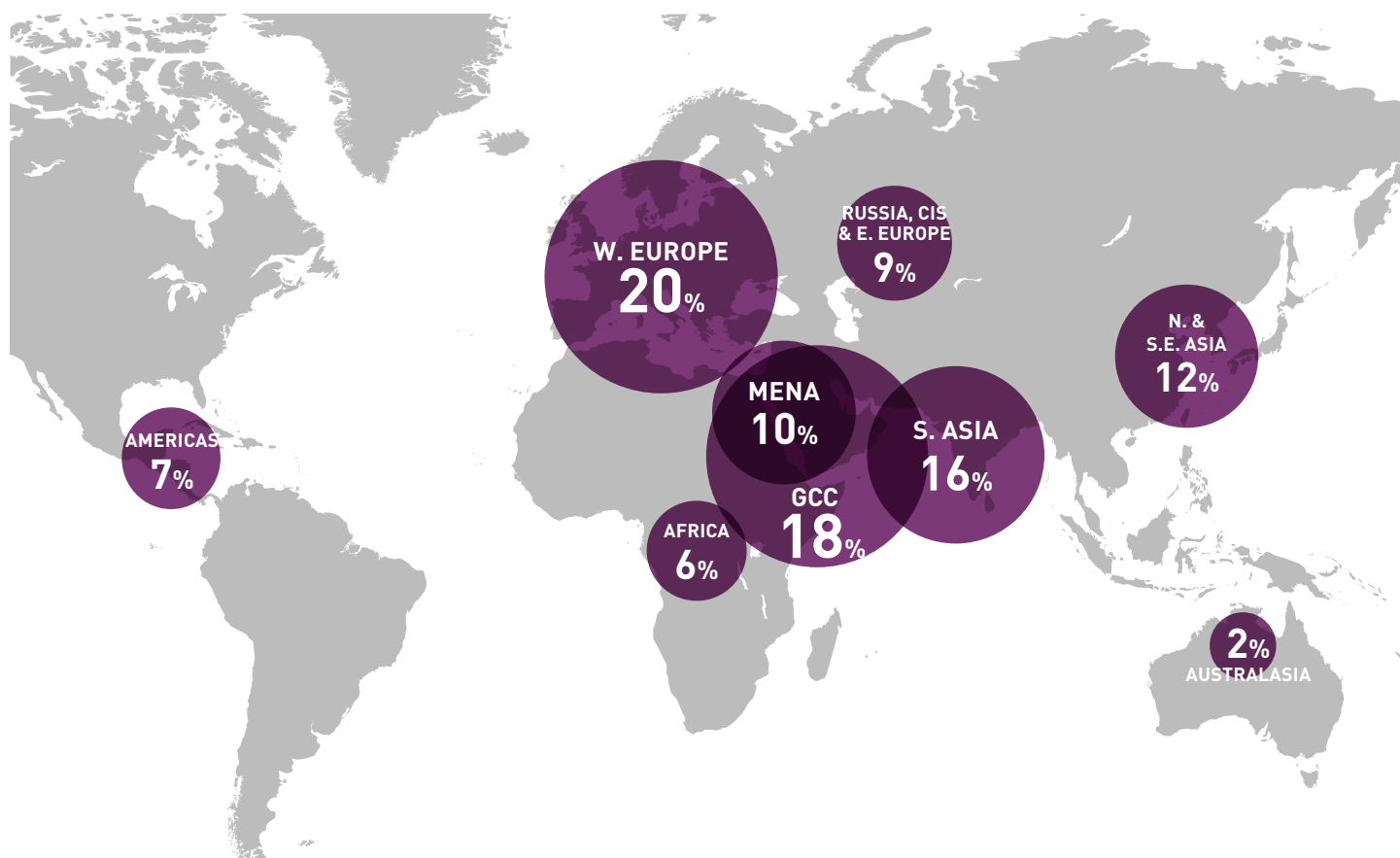
Dubai's fourth- and fifth-largest source markets in 2019, Oman and China, each delivered double-digit year-on-year percentage growth in arrivals. Oman accounted for more than one million visitors, registering a 24 per cent increase compared to 2018, while China was close behind with 989,000 visitors, marking a year-on-year increase of 15 per cent.

SUMMER 2019 PROVES A STRONG DRAW FOR DUBAI

Tourism arrivals to Dubai surged 13 per cent year on year during summer 2019, with the family segment driving this growth. This trend reflects Dubai's increasing popularity as a year-round holiday destination.

Visitors from across the GCC led this record summer performance, with Oman ranking first in terms of total arrivals.

SOURCE MARKETS BY REGION JAN-DEC 2019



Traffic from the Sultanate rose by a massive 47 per cent year on year during Eid Al Adha in August, and 25 per cent year on year during the Omani National Day holiday period in November. These results further validate Dubai's appeal as one of the most-popular short-break destinations among Omanis, and are testament to Dubai Tourism's marketing initiatives in the Sultanate, particularly its active seasonal messaging campaigns and extensive programme of custom activations.

KEY GROWTH MARKETS DELIVER IN 2019

China further consolidated its reputation as one of Dubai's most important growth markets, with visitor arrivals totalling 989,000 – more than double the number recorded four years ago and prior to the introduction of visas on arrival for visitors from the People's Republic. Dubai Tourism successfully adopted a three-pronged approach to expanding the city's appeal to Chinese visitors: (i) 'direct-to-consumer' platform-based awareness programmes; (ii) customised trip-planning supplemented by advocacy-driven collaborations; and (iii) in-city experience synchronised with China Readiness delivery.

Dubai remained true to its 'diversified source market' strategy, not only in a bid to mitigate geographic risks, but also as a reflection of the 'inclusive' and multicultural DNA of the city. The approach that has to-date yielded robust results continued to reap benefits in 2019, as citizens from many of the world's fastest growing emerging economies added Dubai to their travel wishlists.

The city's appeal to African travellers remained high, with Nigeria ranking as the fastest-growing source market accounting for 246,000 visitors (+33 per cent) in 2019. Other fast-growing markets included the Philippines and Kazakhstan, which both posted 23 per cent year-on-year growth, delivering 477,000 and 147,000 visitors respectively. Other fast-growing markets came from across Europe and the MENA region as France saw further growth with 382,000 visitors (+10 per cent), Egypt delivered 314,000 visitors (+8 per cent) while Russia reported seven per cent year-on-year growth with 728,000 arrivals in 2019.

Western Europe retained top rank accounting for 20 per cent of all visitors in 2019, with 3.4 million tourists, which – in the context of overall economic softness, and currency volatilities – had been driven by impactful marketing, and targeted promotional efforts led by Dubai Tourism throughout the year. Coming in at a close second again was the GCC with over three million visitors (18 per cent), followed by South Asia (16 per cent) with 2.7 million visitors – both regions reaffirming the proximity advantage, and Dubai's emphasis on regularly renewing its touristic propositions that enabled strong repeat attraction from these markets. Rounding off the top five regions were North Asia and South-East Asia at 12 per cent traffic share.

North Asia and South-East Asia ranked fourth overall with a combined traffic share of 12 per cent while the MENA region ranked fifth with 10 per cent of the total. With Russia-CIS, Africa, the Americas and Australasia delivering a total of around four million visitors combined, these regions constituted the remaining 24 per cent of total volume share.

Dubai's popularity as one of the world's top tourism destinations, particularly among families and couples, reflects Dubai Tourism's significant and ongoing marketing investment in successful country-specific strategies, deployed with agility in close collaboration with industry stakeholders



2020 AND BEYOND

Taking the lead in a period that is set to redefine the future of travel

Dubai's strong tourism performance continued into 2020, with the city welcoming 3.27 million international overnight visitors in January and February combined, an increase of 4.2 per cent compared to the same period in 2019. This result was particularly impressive considering the COVID-19 pandemic was spreading across borders and impacting international travel in the first quarter of 2020, despite lockdowns in key source markets, such as China.

Each of Dubai's top 10 source markets from 2019 has been impacted by the transmission of the virus within their countries, subsequently adopting varying degrees of restrictions curtailing travel in a bid to limit the number of cases, whilst simultaneously combatting the instances within their population. Given that the timing of occurrence, and rates of spread have been quite disparate across nations, the reopening of air-space can also be expected to be staggered as controls ease over the coming months and the situation stabilises.

The UAE has been extremely proactive in implementing a far-ranging series of preventative healthcare and hygiene protocols, including ramping up its hospital infrastructure and rapid testing capabilities as confirmed by its ranking as the world's top country for its response to COVID-19 in terms of number of tests per million people. Dubai has deployed technologically integrated advanced safety controls, to prevent, monitor, detect, and ring-fence any incidences within the tourism ecosystem, coupled with stringent operational guidelines across every touchpoint from airports, in-city transport and hotels, to restaurants, retail, and leisure and entertainment facilities.

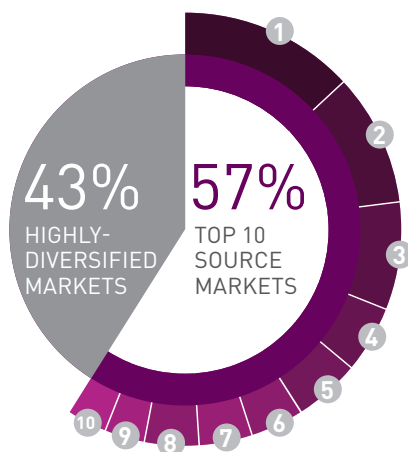
Dubai's tourism sector is laying robust groundwork for a rapid resurgence post the reopening of markets and is geared to accelerate to normalcy thereafter. 2021 is shaping up to be a hugely important year for the city and global tourism, with Dubai hosting the World Expo 2020 – the largest event of its kind ever staged in the Middle East, Africa and South Asia (MEASA) region – which has officially been rescheduled to the second half of the year. More than 25 million people are expected to attend the Expo, which will be staged over 173 days and will feature more than 190 national exhibitors from around the world.

TOP 10 SOURCE MARKETS

RANK IN 2019

% SHARE OF DUBAI'S TOTAL VISITORS

1	India	12%
2	Kingdom of Saudi Arabia	9%
3	United Kingdom	7%
4	Oman	6%
5	China	6%
6	Russia	4%
7	United States of America	4%
8	Germany	3%
9	Pakistan	3%
10	Philippines	3%



OVERNIGHT VISITORS

16.7M
IN 2019

GROWTH IN VOLUME

▲5.1%
2018-19



2019
GLOBAL
RANKING
4

TOP GLOBAL DESTINATION CITIES

	2017	2018	2019
1	Bangkok	Bangkok	Bangkok
2	London	Paris	London
3	Paris	London	Paris
4	Dubai	Dubai	Dubai
5	Singapore	Singapore	Singapore
6	New York	Kuala Lumpur	Kuala Lumpur
7	Kuala Lumpur	New York	New York
8	Tokyo	Istanbul	Istanbul
9	Istanbul	Tokyo	Tokyo
10	Seoul	Antalya	Antalya

DUBAI: THE DESTINATION OF CHOICE FOR THE WORLD

The city's tourism diversification strategy is successfully delivering growth across key visitor demographics

Dubai's strategic efforts to expand its appeal to visitors from around the world continues to pay strong dividends, as 2019 trends show consistent growth across key leisure and business travel segments.

Twenty-five per cent of all arrivals in 2019 were repeat visitors, with nearly half (46 per cent) attributing their decision to visit Dubai to recommendations from residents or friends that had previously visited the emirate - indicating an extremely high influence and positive endorsement of the experience. Visitor advocacy also remains remarkably high, reaching 76.9 per cent in 2019.

Visitors are choosing to stay longer when they visit Dubai, with the average period rising significantly to eight days in 2019, compared to 7.4 days in 2018.

Dubai also retained its position as the world's top destination in terms of tourism receipts according to MasterCard's Global Cities Index 2019, for the fourth consecutive year. Visitor spend on tourism-related activities in the city continued to grow, with total expenditure estimated at US\$32.1 billion for 2019, representing a 4.18 per cent increase over 2018.

BUSINESS TRAVEL ON THE RISE

Even as Dubai continues to rise in its appeal as one of the world's leading leisure tourist destinations, evidenced by the 12.54 million (75 per cent of the total) travellers who holidayed in the emirate last year, its reputation as a global business hub and networking destination has also climbed in parallel.

More than 2.3 million visitors cited business as their main purpose of travel to Dubai in 2019, marking a two per cent increase compared to 2018.

Business travellers also expressed increased satisfaction with the city's rapidly expanding meetings, incentives, conferences and exhibitions (MICE) and major events infrastructure, with the net satisfaction score rising a healthy three points to 72.8 per cent.

INCREASE IN YEAR-LONG FAMILY ARRIVALS DEMONSTRATES CONSISTENCY IN APPEAL

Dubai's rising global appeal as a leading family holiday destination helped deliver strong growth in this key market segment in 2019.

Families with children accounted for 39 per cent of all visitors to the emirate, up from 36

per cent in 2018. The city proved particularly popular with neighbouring markets, as Indian family holidaymakers alone posted a 10 per cent year on year growth in 2019 indicating a sharp increase in appreciation for the quality and variety of offerings for the segment.

Visitors were overwhelmingly impressed with Dubai's broad spectrum and ever-evolving family-friendly tourism attractions, as well as the city's overall ability to cater for inclusive child-friendly experiences across adult offerings in many of its propositions - reflecting their satisfaction with score of 71.3 per cent.

WOMEN AND MILLENNIALS CENTRIC DESTINATION

Couples represented the second-largest visitor demographic at 35 per cent of the total, followed by solo travellers at 12 per cent.

There was a near-even mix in terms of gender, with women accounting for 48 per cent of travellers to the emirate in 2019. Despite a slight (two per cent year-on-year) increase in visitors aged 45 to 54, Dubai remains an overwhelmingly popular destination with younger travellers, with those aged 25 to 44 accounting for 71 per cent of the 16.73 million arrivals in 2019.

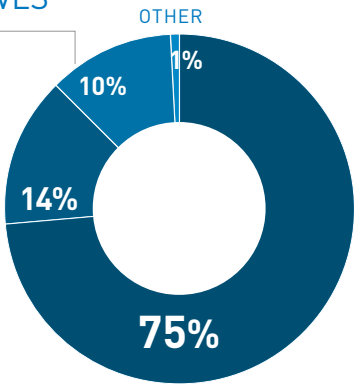
PURPOSE OF VISIT (LENGTH OF STAY)

VISIT FRIENDS & RELATIVES

21.6 DAYS

BUSINESS

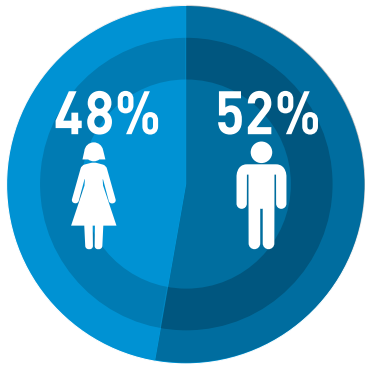
4.7 DAYS



LEISURE

6.1 DAYS

GENDER



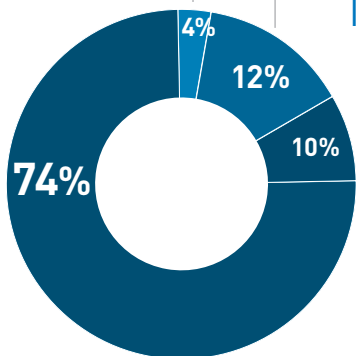
PARTY MAKE UP



COLLEAGUES



FAMILIES/ COUPLES



INDIVIDUALS



FRIENDS



AVERAGE PARTY SIZE

2.8



AVERAGE LENGTH OF STAY

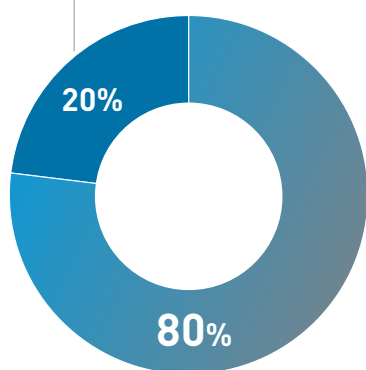
8.0 DAYS



ACCOMMODATION CHOICE



STAY WITH FRIENDS & RELATIVES



HOTEL & HOTEL APARTMENT



TOURIST HOTSPOTS AND UNMISSABLE ICONS: BUCKET LIST FINDS

A clear majority (68.7 per cent) of international visitors expressed satisfaction with Dubai's diverse tourism offerings and experiences, which continue to expand each year.

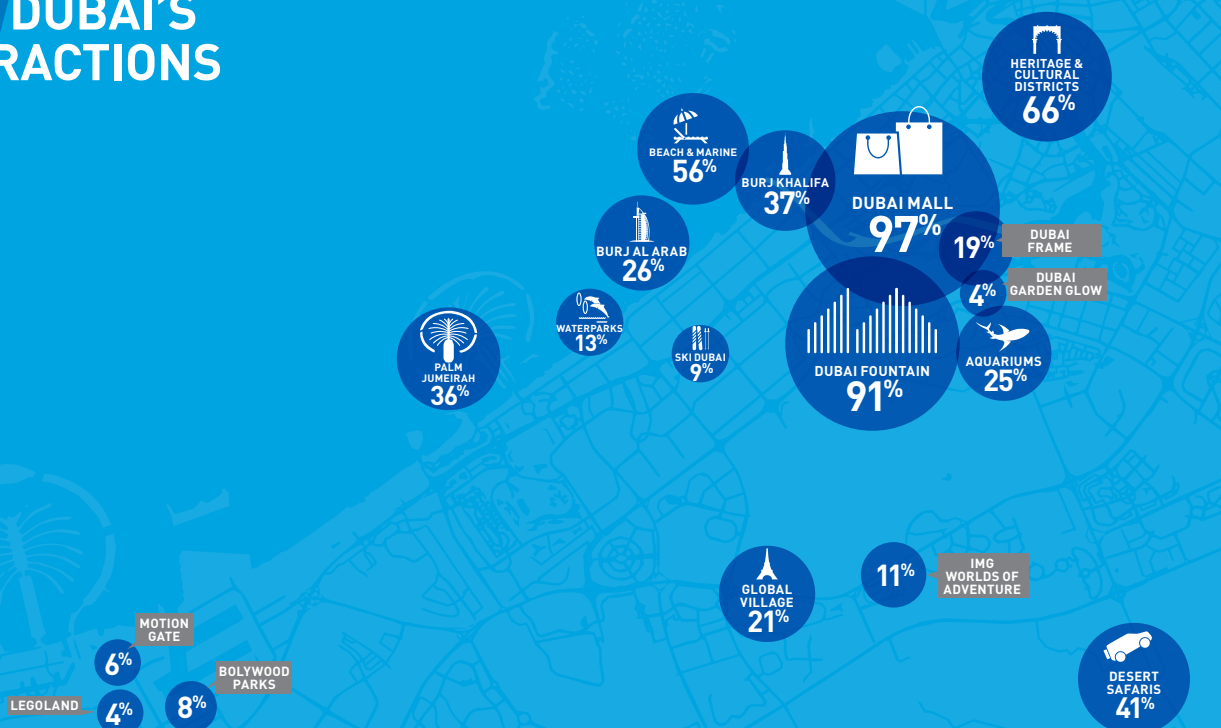
Dubai Mall, which attracted 97 per cent of all visitors, and its world-famous Dubai Fountain (91 per cent) proved one of the city's most-popular attractions in 2019, while the unique family-friendly Global Village, reported year-on-year visitor growth across its top 14 visitor source markets, ultimately welcoming 21 per cent of all visitors to the emirate last year.

The world's tallest building, Burj Khalifa, also recorded a three per cent rise in visitors compared to 2018, with the total number reaching 6.19 million.

Dubai has also been steadily building its reputation as one of the region's cultural hubs, showcasing an eclectic array of modern and world art interwoven with deep-rooted tradition and heritage – offering a very unique complement to the rest of the region. 2019 highlights this growing popularity of the city's its cultural and heritage attractions as they welcomed 66 per cent of all international visitors to the emirate.

Rising demand for adventure travel experiences was demonstrated in the increased popularity of desert safaris among all visitor demographics. The back-to-nature attraction proved a major draw for European visitors, with 54 per cent of Germans (+10 per cent year-on-year), 56 per cent of French (+9 per cent year-on-year), and 43 per cent of British (+9 per cent year-on-year) all taking part in guided desert tours during their stay in the city.

% OF TRAVELLERS VISITING DUBAI'S KEY ATTRACTIONS



Dubai International Visitors Survey 2019

PREVIEW OF THE FUTURE GLOBAL ENTERTAINMENT HUB

Dubai's world-class line-up of festivals, entertainment and sporting events continued to prove a major drawcard for visitors in 2019.

Many of these events, such as Dubai Shopping Festival (DSF), Dubai Summer Surprises (DSS) and Dubai Fitness Challenge (DFC), reflect the collective spirit and strong sense of community for which the city is now famous.

The 25th edition of DSF, which was held from 26 December 2019 to 1 February 2020, proved to be the most successful instalment yet of the mega retail and entertainment event, attracting the involvement of 4,000 retail outlets and more than 10 million attendees over the course of 38 days.

In total, the 25th edition of DSF, which kicked off with a two-day Grand Opening event at Burj Park, comprised 3,847 events, almost half of which were free to enter, including 163 concerts, 119 fireworks displays and eight citywide festival markets.

The first ever hologram concert in the city debuted this DSF at the Dubai Opera Grand Theatre, featuring

a hologram of Umm Kulthum accompanied by a live orchestra of 20 musicians on stage. Major international artists including British pop star and former One Direction member Liam Payne, and regional acts Cheb Khaled, Sherine Abdel Wahab and local act Hussain Al Jassmi, performed live to captivate audiences over the course of the festival.

Meanwhile, 8,818 lucky winners took home DSF prizes worth a combined total of AED50 million, including 87 cars and more than 3,000 gold prizes.

The third edition of DFC – the flagship fitness initiative championed by His Highness Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum, Crown Prince of Dubai and Chairman of Dubai Executive Council – also proved a major success, attracting more than 1.1 million participants from across the emirate, up from one million a year prior.

A staggering 13,000 free fitness and wellness activities, ranging from running to pilates and even a HIIT session with The Body Coach Joe Wicks, were available to the public, with in excess of 285,000 people visiting the purpose-built Fitness Villages

located at Dubai Festival City Mall and Kite Beach, and more than 30,000 attending 11 Fitness Hubs across the city.

The 2019 event also saw Dubai's world-famous Sheikh Zayed Road transformed into a massive running track. More than 70,000 runners of all ages and ability hit the road over a distance of 5km or 10km in a bid to boost their fitness and enjoy the strong community spirit.

Elsewhere, Dubai consolidated its reputation as a major live entertainment destination in 2019, with world-class facilities including the 2,000-seat Dubai Opera and 17,000-seat indoor stadium Coca-Cola Arena, the latter of which opened in June, featuring some of the biggest talent on the planet, including US group Maroon 5, Ireland's Westlife and British comedian Russell Peters.

Major annual sporting events such as the Dubai World Cup (horse racing) and the DP World Tour Championship (golf) also once again proved hugely popular, attracting fans from across the region and the world.



SECTOR-WIDE TRENDS

DUBAI'S AVIATION, ACCOMMODATION AND RETAIL SECTORS REMAIN FOUNDATIONAL ENABLERS TO THE CITY'S TOURISM SUCCESS

1 AVIATION

Dubai further cemented its status as one of the world's most important aviation hubs in 2019, with its two major international gateways, Dubai International Airport and Dubai World Central, both posting strong results.

Dubai International (DXB) was declared the world's leading hub for international passenger traffic for the sixth consecutive year in 2019, welcoming 86.4 million passengers.

DXB marked several important milestones in 2019, confirming its status as one of the world's most efficient and passenger-friendly airports. The installation of new technologies aiding passenger flows – including additional smart gates – saw wait times fall by 15 per cent year on year, even during the months of July and August when passenger numbers exceeded eight million. The airport also set a new benchmark for baggage volumes, delivering 73.1 million bags at a record delivery success rate of 99.96 per cent.

India was once again the most popular destination for passengers flying from DXB, with traffic for 2019 reaching 11.9 million, followed by KSA with 6.3 million, and the UK

with 6.2 million. Other popular destinations included China (3.6 million) and the U.S. (3.2 million). The top three city destinations were London (3.6 million), Mumbai (2.3 million) and Riyadh (2.2 million).

The 45-day closure of DXB's southern runway for rehabilitation in April and May resulted in a surge in traffic at Dubai's second international airport, Dubai World Central (DWC). The resulting increase helped DWC post an impressive 81.5 per cent year-on-year surge in total passenger traffic to 1.6 million. The number of passengers also increased in the final quarter of the year compared to the same period in 2018, with the airport welcoming 363,626 customers (+38.2 per cent year-on-year), thanks to an increase in seasonal operations by chartered airlines.

DWC's reputation as a major hub for passenger traffic from fast-growing visitor source markets such as Russia and the CIS continued to grow in 2019. The CIS region proved the top source market with 583,763 passengers, followed by South Asia (380,000), and the GCC (281,244). Russia was the airport's top country destination with 549,806 passengers followed by KSA (201,138) and India (193,900). The top cities served by the DWC network included Moscow

(253,092), Budapest (60,098) and Jeddah (55,873).

DWC is currently served by six passenger airlines, which operate an average of 30 weekly flights to 45 international destinations around the world. The airport is also home to 17 cargo operators that serve around 45 cities globally.

During the global COVID-19 pandemic, DXB has proven a vital hub for repatriation flights and international cargo services, including medical relief flights. In addition, Emirates Sky Cargo helped to import more than 34,000 tonnes of food into the country between January and April 2020, 13,000 tonnes of which were imported between March and April. In April alone, Emirates SkyCargo helped to bring food supplies into the UAE from more than 35 countries around the world.

Airport operator Dubai Airports is also offering relief measures to its aviation and commercial partners under a 'Business Stabilisation Framework' to allow quick remobilisation of the aviation industry when international passenger traffic ramps up in the coming months.

2 ACCOMMODATION

Dubai's guest accommodation sector posted another strong performance in 2019, with the total number of occupied room nights eclipsing 32 million for the first time, a 6.5 per cent improvement on the 30.13 million occupied room nights recorded in 2018.

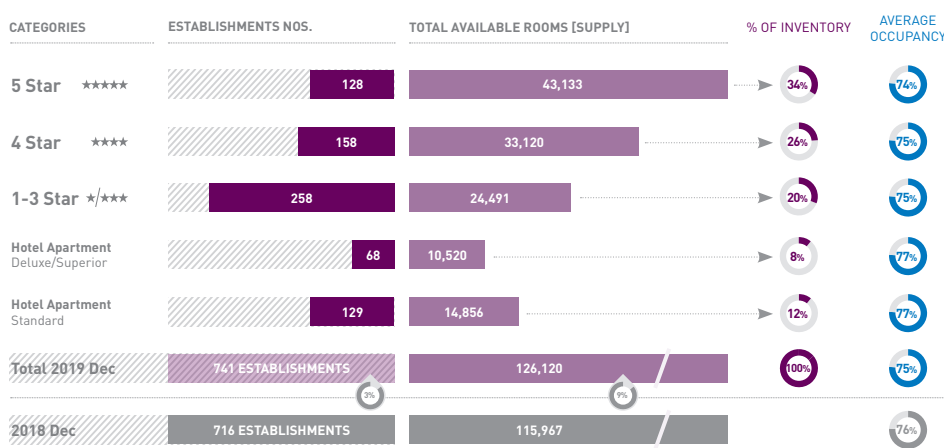
Dubai's hotel guestroom inventory stood at 126,120 in December 2019 – a nine per cent YoY increase – while the number of hotel establishments totalled 741, up from 716 in the previous year.

The average occupancy rate stood at 75 per cent for the year, which was a commendable performance given the significant increase in guestroom supply. This marker does however show an impact on the average daily rate, which stood at AED 415 (-11 per cent YoY) and revenue per available room (RevPAR), which totalled AED 312 (-12 per cent YoY) reflective of a very strong USD currency, and suppressed consumer affordability levels across source markets, yet reflects a very strong competitiveness of the sector at a global level.

While Dubai continues to expand its midscale and upper-midscale hotel offering, its five-star guestroom inventory remains the dominant accommodation category, accounting for 34 per cent of supply. A total of 33,120 rooms were designated four-star in December 2019, accounting for 26 per cent of the total guestroom supply.

Demand for quality, value-for-money accommodation options continues to grow in Dubai, reflecting the city's efforts to diversify its tourism offering and attract a broader visitor demographic from fast-growing source markets in Asia, Africa and the CIS. This trend

HOTEL INVENTORY BY CATEGORY AND PERFORMANCE KPIS [2019 | 2018]



is driving growth in the city's affordable hotel sector, with the number of one- to three-star hotels totalling 258 and accounting for 20 per cent of the total guestroom inventory in 2019.

Hotel-apartments also rank among Dubai's fastest-growing accommodation options, with this segment accounting for the highest average occupancy rate of all categories at 77 per cent in 2019.

The city's growing diversity of accommodation options will ensure its popularity continues among business and leisure travellers from across the globe as the travel sector rebounds in the coming months.

Hotels across the city that are staging their reopening are mandated to adopt a stringent set of international health and safety protocols that

have been enhanced further to reinforce Dubai's reputation as one of the world's safest destinations.

Restrictions that were recently relaxed allow for the reopening of hotel beaches and resumption of water sports activities, with more prescriptive rules including disinfection and frequent sterilisations to ensure the health and safety of all hotel guests, as well as staff. Dubai continues to take prudent steps to instil confidence within our society and encourage people to return to their everyday life in a measured way. The gradual easing of restrictions relating to beaches and water sport activities at hotels is one of the more critical parts of the economic reopening plans, as it is a key component of Dubai's leisure offering and will enable to kick-start the reactivation of the tourism sector among others across the city.



City Walk

3 RETAIL

Dubai's reputation as a major global shopping destination was further enhanced in 2019, with several major openings significantly boosting its inventory of mega malls and retail precincts.

Highlighting the importance of the retail sector to Dubai's tourism offering, Dubai Mall retained its position as the city's most-popular attraction in 2019, with 97 per cent of the 16.73 million international arrivals visiting the lifestyle destination during their stay in the emirate, according to the 2019 Dubai International Visitors Survey (DIVS). According to real estate consultancy Jones Lang LaSalle, more than 282,000 sqm of retail GLA was completed in 2019 – the highest level since 2015 – with highlights including the Q4 opening of Nakheel Mall on Palm Jumeirah and the Zabeel expansion at Dubai Mall. The additions brought Dubai's total retail stock to around four million sqm.

Dubai's diverse array of retail offerings continues to prove a major drawcard for international

visitors, as evidenced by the net satisfaction score of 63.5 per cent achieved by the sector according to the 2019 DIVS. The city has carved a niche providing world-class experiential retail offerings. One day shoppers can be enjoying the glamour of the Fashion Avenue of Dubai Mall and the next exploring traditional souks and markets or the one-off fashion boutiques of the trendy Jumeirah district. In fact, the sheer range and diversity of home-grown and international retail brands that are available in Dubai combined with events and family-oriented fun contribute towards a unique shopping experience that is further enhanced by a warm traditional Arabic welcome, world class infrastructure and ease of getting around through an extensive citywide transportation network.

The annual Retail Calendar, which comprises a robust schedule of sales and promotional shopping campaigns centered on key festivals, events and holiday periods, was a key contributor to the success of Dubai's retail sector in 2019. A major highlight was the milestone 25th edition of the iconic DSF, one of the key attractions for tourists from around the world. The Silver Jubilee

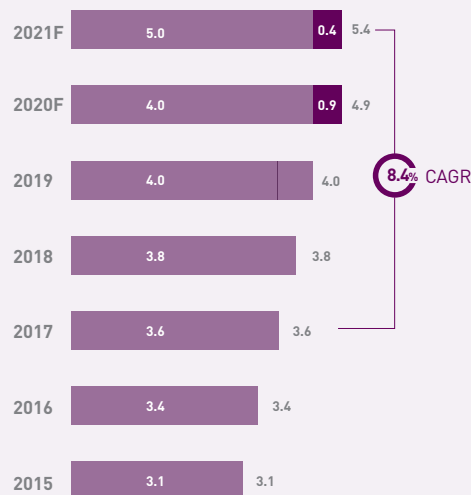
celebrations of DSF, which was staged from 26 December 2019 to 1 February 2020, attracted more than 10 million attendees to all the retail events and activations that were held throughout the 38-day long festival. Retail-related festivals and events are a key element of Dubai Tourism's strategy to leverage the multi-faceted events and ancillary sectors to add value to the city's tourism offering.

Other retail fixtures that drew large numbers of visitors to Dubai, mostly families from the neighbouring GCC markets, included the Dubai Summer Surprises and Eid in Dubai celebrations on the occasion of Eid Al Fitr and Eid Al Adha. The packed summer retail and events line-up, which included rewards packages and value offerings, attracted a large number of visitors from GCC markets, specifically from KSA and Oman, further consolidating Dubai's reputation as a year-round shopping destination.

Government and private sector establishments are also collaborating to mitigate the impact of the current situation on the retail sector through a phased revival that is being carried out in coordination with public health authorities. With the health and safety of shoppers and the retail workforce being the top priority, the gradual return of retail activity is also accompanied by the implementation of stringent measures such as temperature checks, wearing of masks by shoppers and employees of malls and retail outlets, as well as social distancing policies.

RETAIL SPACE & CAGRs

[IN MILLION SQM]



CONNECTIVITY

257

GLOBAL
DESTINATIONS
SERVED DUBAI
AIRPORTS



AIRPORT TRAFFIC

86.4M

DXB PASSENGER
TRAFFIC DURING 2019



HOTEL CAPACITY

126K $\uparrow$ 9%

ROOMS
AVAILABLE IN 2019



SETTING THE STANDARD

Delivering exceptional visitor experiences has proven crucial to driving Dubai's impressive tourism growth

Over the past 20 years, Dubai has established itself as one of the world's most-popular and fastest-growing business and leisure destinations. Its commitment to providing visitors from across the globe with exceptional, unique and memorable experiences has earned it dozens of coveted accolades during this time, including being named the World's Leading Destination in 2004, 2008, and 2013 to 2016 at the World Travel Awards. Dubai also earned its stripes as one of Conde Nast Traveler's 'Best Places to Go in 2020' and Lonely Planet's 'Best in Travel 2020' list, while the Michelin Green Guide's popular 'Dubai' edition provides French travellers with in-depth insights into the city's artistic, cultural and social life.

According to the findings of the 2019 DIVS, which was based on interviews with more than 23,000 holidaymakers and business travellers, 99.8 per cent of respondents said they were 'happy' or 'extremely happy' with their Dubai experience, which was consistent with 2018 results. Meanwhile, asked how likely they were to recommend Dubai to friends or family, 99.6 per cent indicated they would be 'likely promoters' or 'active advocates', which was also consistent year on year.

Overall, satisfaction with Dubai's key offerings and experiences remained strong among international visitors to the city in 2019. The average net satisfaction score among those surveyed by Dubai Tourism reached 68.7 per cent last year, with Russian travellers showing a significant increase [+9 per cent year-on-year] in satisfaction rates. Dubai's General Entertainment offerings attracted the highest satisfaction scores at 73.7 per cent, followed by Business Events and Meetings at 72.8 per cent and Family Entertainment at 71.3 per cent.

In regard to other key sectors, Hotels & Accommodation attracted a net satisfaction score of 71 per cent, up from 70.4 per cent in 2018; Food & Restaurants was stable at 60.8 per cent; as was Shopping & Retail at 63.5 per cent.

The key to this strong performance has been the implementation of innovative industry training and education services, delivered by Dubai Tourism subsidiary, Dubai College of Tourism (DCT).

In January 2019, DCT opened its doors to the brand-new, purpose-built college facility at Dubai Tourism's headquarters, located in One Central. The new-age campus provides up to 150 students the opportunity to earn Knowledge and Human Development Authority (KHDA)-accredited Certificates and Diplomas across five core disciplines: retail, tourism, hospitality, culinary arts and events. Capped class sizes ensure the students benefit from the interactive and practical focus of vocational education. The opening of the campus reflects Dubai Tourism's ambitious approach to establishing world-class service standards and delivering bespoke experiences for visitors, particularly from fast-growing source markets, such as China.

DCT has been extremely proactive in its approach to date. In April, the organisation launched Developing a China Ready Strategy and the Chinese Traveller Standards, which are online training programmes designed to provide employees from across Dubai's tourism industry with the skills and knowledge to deliver exceptional and personalised experiences to Chinese visitors to the city.

The programmes can be accessed via the 'Dubai Way' interactive online training platform, which is one of the world's most innovative services of its type and caters to all tourism industry stakeholders and employees in the emirate. Dubai Way comprises practical video training modules covering topics including cultural awareness, professional and social etiquette and customer service.

Launched in 2017, Dubai Way and the innovative Dubai Expert training tool, have proven critical assets for Dubai's tourism workforce and international sales network, with more than 30,000 participants having completed the

training to date, with each being crowned a 'Dubai Way Champion'.

Both services received extensive updates in 2019, with Dubai Way now including a new advanced module on 'Inclusive Service' that focuses on providing the highest standards of customer service to people of determination, reflecting Dubai's all-inclusive society.

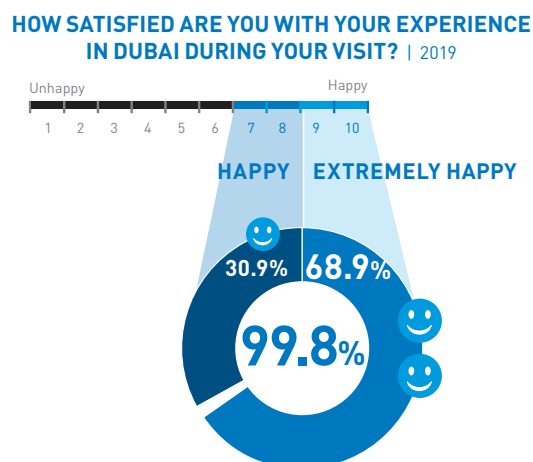
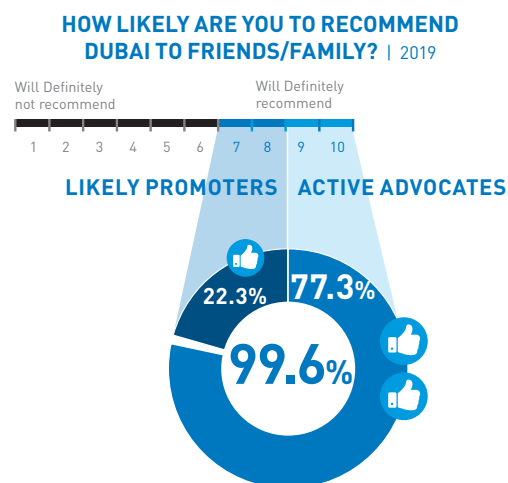
Meanwhile, Dubai Expert features an interactive interface that provides international travel agents with the latest news, information, and tourism developments across the city, as well as a remote 360 experience to help them better advise customers who are looking to visit Dubai. The latest updates to Dubai Expert include enhancements to the platform's interface, which is now available in 14 languages across 40 countries.

In November, DCT signed an agreement with the Expo Generation Programme to train more than 350 Emiratis for diverse and pivotal roles at Expo 2020 Dubai. The training is being implemented under Medyaf, the industry nationalisation programme of DCT which is designed to nurture local talent and provide them with the necessary skills to excel in their chosen careers in the tourism sector.

The initiative is another example of DCT's drive to offer Emiratis strong career options in tourist-facing roles, with the goal of providing visitors with a more authentic experience during their time in the city, and moreover, enhancing the city's tourism offering.

In response to the COVID-19 global pandemic, DCT has developed a range of initiatives to educate and support employees working in the tourism industry. These tools are vital in not only safeguarding all employees and visitors to Dubai, but in helping prepare staff deal with the complexities and challenges posed by the virus and how it is likely to reshape global travel in the next 12-18 months.

VISITOR RECOMMENDATION & SATISFACTION



MASTERING THE SCIENCE AND ART OF NEXT GEN SOCIAL MEDIA

Social media's universal appeal and global reach has proven a vital promotional tool for Dubai's tourism sector

Dubai's reputation as one of the world's leading tourism destinations has been significantly enhanced by its innovative and ambitious approach to online marketing, particularly in regard to social media.

Dubai Tourism's online presence now spans in total more than 80 social media channels in 22 languages, including Facebook, Instagram, Twitter, YouTube, LinkedIn, TikTok, SnapChat, VK, Weibo, WeChat, Douyin, Youku, Kakao, Naver and Line.

The organisation has achieved significant traction partnering with these platforms, as well as respected influencers, to promote the city to a global audience, as evidenced by its 20.1 million active followers across 15 unique social networks reported in 2019, up more than 10 per cent compared to 2018.

Dubai Tourism's audience engagement levels reached 14 per cent last year, which is double the industry average. Demonstrating its reach, the organisation's international marketing arm, Visit Dubai, operates 60 social accounts in more than 22 languages globally and manages in excess of one million-plus earned and owned conversations every year.

Through Visit Dubai, Dubai Tourism runs major campaigns with celebrities from Hollywood and Bollywood, that have a collective viewership of more than 700 million across all channels.

Dubai Tourism's major global marketing campaign for 2019, entitled 'A Story Takes Flight', which featured Hollywood superstars Gwyneth Paltrow, Kate Hudson and Zoe Saldana, was a massive hit with social media users, with the films being viewed more than 521 million times online and resulting in more than two million visits to the VisitDubai website in the two months following its release in November.

Meanwhile, campaigns designed to drive user engagement with the destination, such as 2019's #ThisIsDubai social media campaign, which was hosted in collaboration with the world's leading short-form mobile video application, TikTok, highlights the potential global reach of Dubai Tourism's social media strategy.

The initiative invited TikTok users in 150 markets worldwide to create bespoke videos featuring customised AR stickers and music to showcase the city's amazing attractions and 'only in Dubai' experiences. The campaign received an overwhelming response from users, with almost 10,000 unique videos created and in excess of 30 million views generated on the campaign's TikTok page.

Last year, Dubai Tourism also partnered with respected names such as online travel publisher Beautiful Destinations, leading reviews site TripAdvisor and web giant Google, to develop bespoke content promoting Dubai to potential visitors from around the world.

One of the organisation's most successful and innovative online campaigns targeted China, which ranks among Dubai's fastest-growing visitor source markets. Partnering with WarnerMedia subsidiary Turner Asia Pacific, the highly engaging and interactive campaign starred the popular Chinese emoticon, Tuzki, and featured a series of short digital clips showcasing Tuzki's 'Ultimate Dubai Vacation'. Chinese web users were invited to follow Tuzki's journey on DubaiTourism.cn, Weibo and WeChat and interact via a dynamic H5 platform, 'virtually' playing with Tuzki in Dubai for a chance to win one of four holiday packages to the city. The promotion attracted millions of Chinese users keen to learn more about Dubai's exciting and unique attractions.

Dubai Tourism has also enjoyed success partnering with key stakeholders in the emirate, teaming with the likes of DSF and Dubai International Film Festival (DIFF) to promote the city as a retail and cultural destination respectively across its social media platforms. In fact, DSF and others collectively generated an additional 350,000 local social media conversations in 2019.

Dubai Tourism also partners with entertainment organisations and music labels to promote the city to the world via various social media channels, sponsoring music videos from major artists including Rita Ora, Jidenna and Imagine Dragons, which have collectively received more than 1.7 billion views on YouTube alone.

SOCIAL MEDIA ENGAGEMENTS



907M [^] **4.6%**
(YOY)

SOCIAL CHANNEL FOLLOWERS

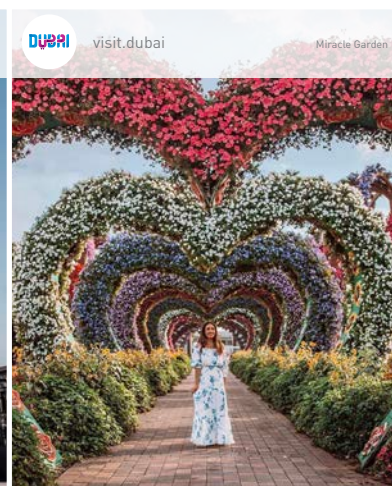
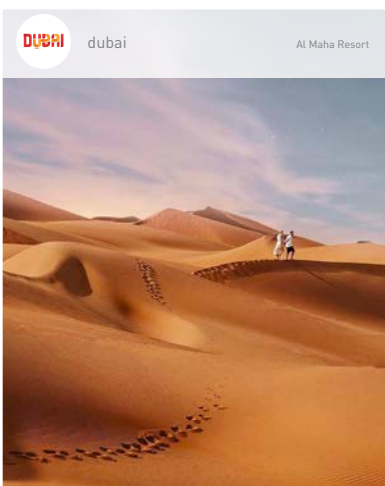


19.1M [^] **1.9%**
(YOY)

ENGAGEMENT RATE FOR SOCIAL CONTENT



23.5% [^] **27%**
(YOY)



EXPLORING THE POWER OF PERSONALISED STORYTELLING

Dubai Tourism's highly sophisticated approach to creating compelling content is showcased in its global and regional marketing initiatives

Dubai's reputation as one of the world's most dynamic and popular business and leisure destinations can in part be attributed to Dubai Tourism's unique approach to audience engagement and its specialised global and regional marketing initiatives.

In 2019, the strategy was perfectly encapsulated in its landmark 'A Story Takes Flight' global marketing campaign featuring Hollywood superstars Gwyneth Paltrow, Kate Hudson and Zoe Saldana, which was directed by Emmy and Director's Guild-award-winning filmmaker Reed Morano.

'A Story Takes Flight' invites the audience to join the famous actresses as they embark on their own personal journeys of exploration through Dubai, discovering the authenticity and richness of the city along the way. Employing a highly immersive and cinematic style, the campaign showcased the living, breathing, often unseen side of Dubai brought to life through its dynamic, multicultural population. The campaign, which launched on 21 November last year, has proven a global success, with the films being viewed more than 521 million times online and resulting in more than two million visits to the VisitDubai website in the period up to 31 January 2020.

'A Story Takes Flight' reflected Dubai Tourism's shift to an 'always-on' marketing communications strategy, where unique storytelling takes centre stage and the campaign itself forges a personal and ongoing dialogue with potential guests from around the world.

This strategy gives voice to heartfelt human stories that showcase experiences visitors to Dubai can enjoy as individuals and in groups, rather than focusing on details about the experiences themselves.

The highly-personal approach, which captures the emotional enjoyment and satisfaction of travel itself, is also reflected in Dubai Tourism's ground-breaking regional campaigns.

Debating in 2019, the latest instalment of #BeMyGuest – its award-winning, multi-platform collaboration with Bollywood megastar Shah Rukh Khan – featured 'SRK', as he is affectionately known, embarking on a series of six adventure-inspired films across Dubai. The highly-interactive series saw SRK visit famous destinations including IMG Worlds of Adventure, City Walk, Souk Madinat Jumeirah, Al Fahidi and La Perle by Dragone at Al Habtoor City, where he hunted for clues with the help of residents and fans. Since its launch in December 2016, #BeMyGuest has seen strong engagement



across social media with the sequel, which was released in 2017, receiving more than 100 million views worldwide.

Meanwhile, in Pakistan, Dubai Tourism last year partnered with leading South Asian television network, House of ARY, to launch the 'Chalo Dubai' ("Let's Go to Dubai") campaign. The initiative not only offered Pakistani visitors the chance to experience Dubai's top attractions, but also to meet famous TV and film personalities including Humayun Saeed, Fahad Mustafa, Nida Yasir and Faisal Qureshi, each of whom has strong personal connections with Dubai. Visitors enjoyed guided tours of cultural sites and popular attractions across the city, a Dubai Creek dinner-cruise experience, a traditional desert safari experience, and 'meet and greet' opportunities with the celebrities themselves.

In the wake of the global lockdown resulting from the spread of COVID-19, Dubai Tourism's agile and effective approach to audience engagement has also been reflected in its latest social media-led campaign, entitled 'Till We Meet Again'.

The promotional film, which launched in April, features stunning footage of iconic Dubai experiences and landscapes, including deserts, beaches and the city's skyline. The film's highly personal and evocative style is designed to invoke an emotional response in viewers, reminding them about what they love and miss about Dubai. It also promotes the important message that when international travel resumes, the city and its people will be ready to welcome them back.

MOVING FROM HI-TECH TO EXPERIENCE TECH

Dubai's reputation as one of the world's most technologically advanced cities continues to enhance its broader appeal to future visitors

As one of the world's most dynamic destinations, Dubai is pioneering a host of innovative technologies designed to enhance the visitor experience across various touchpoints in the city.

CHINA INITIATIVES

In 2019, Dubai Tourism introduced 'mobile and digital first' initiatives customised for visitors from key source markets, such as China, complementing its China Readiness strategy. Aimed at increasing Dubai's market share of China's outbound travel market, Dubai Tourism partnered with Chinese conglomerate Tencent to further enhance the popular Dubai City-Experience Mini Program that is available to

users of China's most-popular social media platform, WeChat.

The relaunched Dubai Mini Assistant now includes 10 new digital audio tours covering some of Dubai's most popular precincts and attractions, as well as an AI-enhanced chatbot, delivering seamless support to users navigating their way around the city. With retail being such a highly desirable travel activity for Chinese travellers, the augmented service also enables users to claim instant VAT refunds via the We Tax Refund feature of the WeChat app.

AUGMENTING THE DESTINATION EXPERIENCE

In another first, Dubai Tourism introduced an innovative and immersive destination-experience enhancement that involved the installation of dedicated QR code plaques in 54 popular locations across the city. The QR codes, which can be found in malls, souks, parks,

cultural sites and theme parks, are designed to enable visitors to use their smart devices to discover more about the city's iconic sites and landmarks, adding an exciting and informative multimedia dimension to self-guided tours.

BRINGING THE DESTINATION TO THE TRAVELLER

With investment in virtual and augmented technologies being a priority for Dubai – both as a city and as a tourism destination – the temporary travel constraints have proven an ideal opportunity for potential visitors to experience the city's world-famous attractions, stunning skyline and pristine beaches virtually. During the lockdown period, thousands of users logged into Dubai360, a website offering 360-degree virtual tours of the city. Described as one of the world's largest virtual tours of any major destination worldwide, visitors can zoom in and explore Dubai through high-resolution panoramas comprising dozens of rooftop views, cultural landmarks, mega malls and urban attractions.

DIFC



AT THE HEART OF THE CAPITAL OF INTERNATIONAL BUSINESS AND COMMERCE

Dubai's dynamic commercial reputation and proactive approach to industry engagement has helped establish the city as one of the world's leading MICE and major events destinations

Dubai's reputation as a global gateway to the Middle East, Africa, Asia and Europe, combined with its dynamic economy and modern, world-class infrastructure, has made it a magnet for major global events, as evidenced by the colossal growth of its MICE industry.

This again continued in 2019 as Dubai Business Events (DBE) worked with city stakeholders to secure 301 meetings, conferences and incentives for Dubai, while at the same time bidding for a total of 595 events. Added to successful bids from previous years, it meant a pipeline of approximately one million hotel room nights had been secured through the convention bureau, a remarkable demonstration of the exponential impact business events can have on the city's economy.

Among the key bid wins were the World Hospital Congress 2021 (Healthcare), Asian Congress on Urology 2023 (Medical) and International Association for the Protection of Intellectual Property World Congress 2025 (Law). Dubai also continued to consolidate its status as an incentive destination of choice, with key wins including the 8,000-strong Amway China Leadership Seminar 2020 and the Enersys Phoenix XL Annual Incentive, set to welcome 1,000 delegates in 2021.

Meanwhile, the hosting of the Destination Wedding Planners Congress and DBE's own Global Wedding Excellence Retreat helped to showcase the city's holistic offering for couples wanting a spectacular setting wedding to cherish with family and friends.

Dubai World Trade Centre (DWTC) also enjoyed a stellar year of growth in 2019, welcoming 3.57 million attendees and delegates, up four per cent on the previous year, and hosting a total of 349 business events, of which 97 were classed as large-scale, with more than 2,000 attendees. International participation in events at DWTC spiked by 15 per cent to 1.2 million, underlining the strong benefits businesses around the world see in coming to Dubai share knowledge, network and accelerate their development.

Standout events included Arab Health, which registered a 27 per cent year-on-year rise in attendance in 2019, as well as Gulfood and GITEX Technology Week – both key pillar events within their respective sectors. The venue also added to its stable of Future Tech events, with the hosting of the AI Everything conference and Global Blockchain Summit, focusing on innovations Dubai is the leading the way in shaping.

Global challenges have always required global solutions, with the coming together of experts and leading thinkers in their respective fields being more vital than ever before; Dubai's strong record in delivering world-class business events means it will continue to be the ideal setting for this.



GLOBAL ENGAGEMENT PROGRAMME DRIVES BUSINESS GROWTH

As we look ahead, the city is well placed, thanks to the work undertaken by DTCM over the last few years, to engage with a global business audience through a comprehensive network of partnerships and communication platforms.

Last year, Dubai Tourism further consolidated its strong partnerships with major international broadcasters and media organisations – including the BBC, CNN, Bloomberg, CNBC, The Times Group and Euronews NBC – which combined delivered more than 1,500 original editorial minutes on Dubai. Above The Line TV and digital campaigns attracted more than 251 million video views and 1.76 million website engagements, reaching a cumulative audience of more than 1.3 billion.

Adding to its impressive stable of TV partnerships, Dubai added both Euronews and CNBC in 2019, opening up new editorial routes and geographies. Through its extensive network, the CNBC partnership saw Dubai feature in its prime-time international programming as well as in bespoke content tailored to the Indian and African markets, such as Indian Business Week and Captains of Industry.

Euronews, broadcast in 9 languages for European audiences, helped push Dubai's business, technology and lifestyle offerings to core continental audiences, as well as into Africa again via its Africanews partnership. Euronews also increased its bureau size in the

city, and anchored its key Business Line programme from Dubai.

Building on previous years, DTCM also re-engaged with CNN and BBC in much more encompassing partnerships to leverage their global network and well-respected anchors. CNN added new programming for 2019 focussing on Dubai's entrepreneur scene with its Becky Anderson-led, Follow That Start-Up series, looked at Dubai's 'bleisure' offering with a new-look 30-minute Downtime Dubai show. BBC covered the city through independent programming on technology, business and tourism, crafted the This is Dubai television commercial series, which aired in over 100 countries.

These highly bespoke partnerships deliver a year-round stream of relevant and engaging content across business and lifestyle-focused media platforms, from interviews with the city's business leaders and features about start-ups at the forefront of innovation, to snapshots of Dubai's entrepreneurial spirit. In the post-COVID era they will showcase a city that not only provides an environment in which businesses and ideas can thrive, but where the safety and security of all residents and visitors remains paramount.

To maximise opportunities in this space, Dubai Tourism plans to increase its level of market engagement, conducting in-market roadshows and working with partners across the public and private sectors to showcase Dubai's calendar of exhibitions, conferences and meetings, which attract hundreds of thousands of key decision makers from around the world each year.

CONFIDENCE AMIDST DISRUPTION: LEADING THE BOLD NEW AGE OF TOURISM

After posting another year of record results in 2019, Dubai's inherent strengths means it is well-prepared for a changing world

Dubai's evolutionary approach to tourism offering and service delivery, reflected in the industry's milestone achievements of 2019, combined with its fundamental economic benchstrength and agility ensures that the city is ideally positioned to respond to any metamorphosis in traveller behaviour, expectations and trends in a post-COVID 19 era.

Firmly established as the fourth most-visited destination on the planet, Dubai remains on the radar of millions of leisure holidaymakers and business travellers worldwide, many of whom

will undoubtedly return to the city as global travel reopens.

When they visit, they will be welcomed with the signature warmth and hospitality that Dubai has been recognised for, and has taken it several steps further in taking painstaking efforts to safeguard the health and wellbeing of every single guest, so they can enjoy the incredible and unique attractions that they've come to expect from the city.

Dubai's reputation for safety and security has always been one of its stellar attributes and in today's context will go even further in providing much needed reassurance to those that are tentative to venture back out on travel, especially with families.

Recognised as a global hub for tourism, commerce and trade, the city has cemented itself as a dynamic, multicultural home to more than

three million people from more than 200 countries worldwide. A symbol of open and inclusive social harmony and a true global microcosm, alongside the remarkably unstoppable pace of innovation and development across all tourism offerings to cater for travellers from around the world, has set the stage for a tomorrow that promises a more accelerated rise for Dubai to become the most popular travel destination in the world.

Ultimately, these facts alongside the remarkable development and momentum of Dubai's tourism sector over the past decade and its ambitious plans for the future – which remain undiminished despite the current challenges – will underpin the city's continued success as one of the world's most popular destinations.

Dubai Tourism looks forward to working alongside all stakeholders as we once again welcome the world to Dubai.

“Challenges are, in reality, our chance to create new solutions, to think differently and to increase our knowledge and expertise.”

“We are proud of our past and our present and we face the future with unflagging determination.”

His Highness Sheikh Mohammed bin Rashid Al Maktoum
Vice-President and Prime Minister of the UAE and Ruler of Dubai

KEY TERMS

LENGTH OF STAY

Refers to the number of days spent in Dubai. Note that the 8 days quoted in this report is different to the historical numbers published by Dubai Tourism on hotel length of stay and cannot be directly compared for two reasons: 1) group difference - one refers to hotel guests, the other to all visitors to Dubai; 2) unit difference - one refers to days stayed, the other to nights stayed.

ROOM NIGHTS

Number of rooms occupied, multiplied by the number of nights in use.

PURPOSE OF VISIT

The primary reason for travel established by asking a closed set of questions including the standard tourism categories of leisure, business and VFR (visiting friends and relatives).

STAYING WITH FRIENDS & RELATIVES (SFR)

A classification of accommodation type not to be confused with VFR (visiting friends and relatives), a classification of purpose of visit. Note in this report that the 2019 SFR proportion is 11 per cent while VFR is 10 per cent. The difference is explained by the fact that not everyone staying with friends and relatives is visiting them as the primary reason for the trip.

SATISFACTION

All satisfaction scores were derived using a 10-point scale; in the satisfaction scale lowest rating being 'Not Strong' and the highest rating 'World Class' and for Recommendation scale lower rating being 'Will Definitely not recommend' and the highest rating 'Will Definitely recommend'.

Respondents are grouped as follows:

- Active advocates / Extremely Happy (score 9-10)
- Likely promoters / Happy (score 7-8)
- Passives / Satisfied (score 5-6)
- Detractors / Unhappy (score 1-4)

Promoter/Satisfaction Score is derived based on the sum of % Active advocates (Extremely Happy) & Likely promoters (Happy).

VISITATION OF KEY ATTRACTIONS

Defined in most cases by ticketed/paid entry. The Dubai Mall Aquarium, Burj Khalifa, Ski Dubai, Burj Al Arab, Desert Safari, Global Village, Motiongate, Dubai Garden Glow, Legoland, IMG Worlds of Adventure, Bollywood Parks and Waterparks are all defined by paid entry into the attraction. Beach & Marine, The Dubai Mall, The Dubai Fountain, Palm Jumeirah, and Heritage Districts are not.

METHODOLOGY HIGHLIGHTS

INTERNATIONAL OVERNIGHT VISITORS

The visitor figures included in this report refer to the international overnight visitor travelling to Dubai and staying for at least one night. This includes all visitors travelling by air, sea, and land but excludes all UAE residents, air crew, and sea crew. The visitor statistics are analysed by nationalities based on a robust set of information including visitor arrivals from the Dubai Immigration Authorities, hotel guests from hotel/hotel apartment establishments, and Dubai International Visitors Survey (DIVS). Note: this number is different to historical numbers published by Dubai Tourism which only referenced hotel establishment guests.

DUBAI INTERNATIONAL VISITORS SURVEY (DIVS)

Most visitor descriptives in this report come from DIVS which is an ongoing survey that covers a sample of approximately 57,000 visitors a year. Face-to-face interviews are conducted with visitors at DXB and other major public spaces in Dubai. Respondents are qualified based on their status as an international visitor and based on the amount of time they have spent in Dubai. Qualified respondents must be leaving Dubai in 24 hours' time to screen-in for the survey; this is to ensure visitors maximum time spent in Dubai and sufficient representation of their full experiences in the emirate.

The sample is selected based on a monthly quota to ensure adequate sample for descriptives on key dimensions. The data collected are weighted by country of residence, month of visit, and catchment area based on actual visitor arrival statistics. This ensures that the profile of visitors surveyed resembles the distribution of visitor arrivals in the total population.

ABOUT DUBAI TOURISM

Dubai's Department of Tourism and Commerce Marketing (Dubai Tourism) is the principal authority for the planning, supervision, development and marketing of Dubai's tourism sector; for marketing and promoting the emirate's commerce sector; and for the licensing and classification of all tourism services, including hotels, tour operators and travel agents. Dubai Tourism plays a pivotal role in Dubai's rise to prominence as one of the world's leading tourism destinations.

For more information on Dubai Tourism, please visit: www.visitdubai.com



