

A night-time photograph of the Dubai skyline, featuring the Burj Khalifa as the central focus. The building is illuminated with lights, and the sky is a deep blue with some clouds. Other skyscrapers are visible in the background, some with lights on. The overall scene is a vibrant cityscape at dusk or night.

دبي

للاقتصاد والسياحة
Economy and Tourism

**DUBAI'S DEPARTMENT
OF ECONOMY AND TOURISM
ANNUAL VISITOR REPORT 2021**

FOREWORD

“Dubai’s economic progress throughout its 50-year history has been shaped by its ability to view challenges as new opportunities for growth. We have successfully navigated waves of global transformation, including the recent worldwide health crisis, by creating new pathways for sustainable development, innovation and enterprise. Dubai has constantly renewed the value it offers to the world as an international destination for business, lifestyle, tourism and talent, stimulating growth not only within the country but also across the globe. Expo 2020 Dubai, one of the most successful World Expos in history, communicated to a global audience our vision of bridging cultures and markets to create new connections, networks and partnerships that can advance progress. Dubai will continue to excel as a global city that brings together talent, enterprise and investment from every corner of the world to shape a brighter future for humanity.”

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



An aerial photograph of Dubai, United Arab Emirates, showing the dense skyline of skyscrapers along the coast, the Jumeirah Ferris Wheel on an artificial island, and the surrounding water and city infrastructure.

Dubai has cemented its well-established leadership as the destination of choice for global travel through 2021, spearheading and stabilising recovery across business, trade, and investment by prioritising the return to a sustainable 'new' normal, especially enabling safe human connectivity.

As the first major international destination to fully reopen borders in 2020, steady scaled recovery ensured that Dubai rapidly gained the trust of international leisure and business travellers. This provided strong foundations for the city to ramp-up throughout 2021, leading into the World Expo – the mega event which saw millions from every corner of the globe confidently visiting, experiencing, and safely enjoying the city.

In parallel, UAE's domestic tourism industry retained the spike triggered during the lock-down with 1.3 million residents electing to holiday at home in the UAE during the 2021-winter, aided by successful stay-cation campaigns such as The World's Coolest Winter. Collectively, the two-pronged approach drove tourism numbers up 32 percent over 2020, landing at 7.28 million visitors in 2021 – supported by the steepest acceleration in the final quarter of the year with Expo 2020 Dubai officially opening its gates on 1 October.

Billed as 'the world's greatest show', Expo 2020 turned the international lens on Dubai - to witness the remarkable consistency, efficacy, and capability [both human and infrastructural], with which the city safely staged the 6-month long mega business and leisure event. Spanning 182 days from 01-Oct-21 to 31-Mar-22, the event registered over 24M visits welcoming travellers from 192 countries, making it a phenomenal feat as the first in-person global congregation of such scale to be delivered anywhere in the world, since the start of COVID-19. This success backed by Expo's global popularity yielded rich dividends for Dubai's tourism industry in 2021, even as the dynamic hotel-hospitality sector recorded some of its strongest results to-date. Over 31.5 million hotel room nights were sold in Dubai - 2nd

highest in its history - marking a resounding 53.7 per cent recovery over 2020, even as the city captured nearly 1% of global hotel room bookings last year.

Dubai's exemplary public-private sector collaboration stood the test of time, putting its best foot forward with synchronised coordination, and unified ownership under glaring spotlights on a global stage. Being hosted in the year of the UAE's Golden Jubilee, capping 50 years of national progress and landmark achievements, has made the outcomes of this event even more historic, even as it sets a new bar for the future of events and tourism. 2022 has already taken off on a high, supported by the joint efforts of the newly formed Department of Economy and Tourism (DET) to showcase Dubai's liveability, professionalism, and its Net Zero commitment, in addition to the well-honed range of consideration facets of leisure and business travel. The city has credibly appealed to, and is attracting a strong pool of talent, capital, and services, to further diversify Dubai's appeal across tourism, events, retail, and broader economic sectors.

Dubai won strong international commendation through 2021, and this remarkable performance would not have been possible without the tireless efforts, and committed perseverance of every private and public sector stakeholder within the city's tourism ecosystem. I would like to extend our most sincere gratitude and appreciation to the entire business community, and applaud every single employee - that have done the city proud during one of the most challenging times in global tourism, standing shoulder to shoulder in facilitating one of the most momentous occasions in our own history. We look forward to building on this incredible shared experience with the world, so that we can author a new chapter for global tourism in 2022.

H.E. Helal Saeed AlMarri

Director General of Dubai's Department of Economy and Tourism

DUBAI MOVING FORWARD

CELEBRATING 'THE YEAR OF THE 50TH'

Dubai's Department of Economy and Tourism (DET) oversaw a series of celebrations marking the UAE's Golden Jubilee in December

Dubai marked the 50th anniversary of the foundation of the UAE by hosting a series of landmark events in December that showcased the country's remarkable development over the past half century.

From official government events marking UAE National Day on 2 December to public festivals and celebrations including concerts, fireworks displays and Expo 2020 initiatives, the city celebrated in style.

EXPO 2020 DUBAI MARKS 50 YEARS OF SUCCESS

The UAE's Golden Jubilee was also celebrated at Expo 2020 Dubai, with a four-day programme of world-class events and immersive Emirati experiences marking the occasion.

On the evening of 1 December, Expo 2020 Dubai's Al Wasl Plaza provided a fitting and spectacular platform for the debut of the 'Journey of the 50th' live show, which highlighted the country's remarkable growth and development since its foundation in 1971.

With Expo 2020 organisers making entry free of charge on UAE National Day, thousands of residents and visitors flocked to the expo site in Dubai South to witness a series of commemorative events and celebrations, including live performances by Emirati singers Fatma Zahrat Al Ain and Eida Al Menhali and a jaw-dropping flyover of the Expo site by the UAE Air Force aerobatics team, 'Al Fursan'.

PUBLIC CELEBRATIONS DRAW THOUSANDS OF RESIDENTS AND VISITORS

Hundreds of thousands of Dubai residents and visitors to the city were treated to dozens of live events, including concerts and dazzling fireworks displays, as part of the UAE's Golden Jubilee celebrations.

Burj Park in Downtown Dubai hosted one of the largest outdoor festivals to mark the occasion, with superstar singers Hussain Al Jassmi, Diana Haddad and Dalia Mubarak leading the celebrations on 2 December and Eida Al Menhali, Shamma Hamdan and Fayeze Al Saeed all performing live on 3 December.



Talent development: DCT unveils UAE Golden Jubilee Scholarship initiative

To mark the UAE's Year of the 50th celebrations, the Dubai College of Tourism (DCT) unveiled a scholarship programme at Arabian Travel Market 2021, bolstering its efforts to provide quality vocational education opportunities to young people, covering key specialisations within the tourism ecosystem.

The Golden Jubilee Scholarship is open to Emiratis and UAE-based expatriate residents of all nationalities, who have completed their grade 12 (or equivalent) high school studies at a UAE-registered school or college.

The scholarship closely aligns with the foundational pillar of the 'Year of the 50th', which aims to inspire the country's youth to realise their personal and professional ambitions over the next 50 years, while contributing to the UAE's social and economic development.

EXPO 2020 DUBAI

‘CONNECTING MINDS, CREATING THE FUTURE’

Over the course of 182 days, Expo 2020 Dubai entertained, enlightened, and educated millions of visitors, demonstrating what can be achieved when humanity works together towards a common goal

One of the most successful World Expos in history, Expo 2020 marked a major milestone for Dubai, further bolstering its reputation as a leading tourism, business and innovation hub. From 1 October 2021 to 31 March 2022, it brought together 192 participating nations, 14 multilateral organisations, 22 commercial partners and recorded an incredible 24,102,967 visits. One in three visitors came from overseas, from a total of 178 countries.

As the first World Expo to be held in the Middle East, North Africa and South Asia (MENASA) region and the first event of its size and scale to be held since the start of the global pandemic, Expo 2020 Dubai marked a major achievement for the emirate and heralded a historic moment for the UAE.

The event’s success was made even more significant by being hosted in the year of the UAE’s Golden Jubilee, paving the way for the next generation of change-makers to continue Expo’s legacy.

Expo 2020 Dubai overcame the vast and significant challenges presented by the pandemic, demonstrating a clear commitment to ensuring the health, safety and wellbeing of the event’s participants, visitors and vast workforce. Organisers implemented a series of strict COVID-19 measures,

including the mandatory vaccination of all Expo and International Participant staff, volunteers, contractors and service providers, while visitors aged 18 and over were required to present proof of vaccination or a negative PCR test before entering the site. Other measures, including the wearing of face masks and social distancing, were implemented in line with the latest information and guidance from local and international authorities, including Dubai Health Authority, the UAE Ministry of Health and Prevention and the World Health Organization.

More than 35,000 events were held across the Expo 2020 Dubai site – from music, dance and children’s entertainment, to business conferences, sports and fitness activations and creative workshops.

Dozens of world-class acts, such as Coldplay, Alicia Keys and Mehad Hamad performed at the event, while sports stars including Cristiano Ronaldo and Lewis Hamilton toured the Expo site.

EXPO 2020 DUBAI CELEBRATES LANDMARK ACHIEVEMENTS

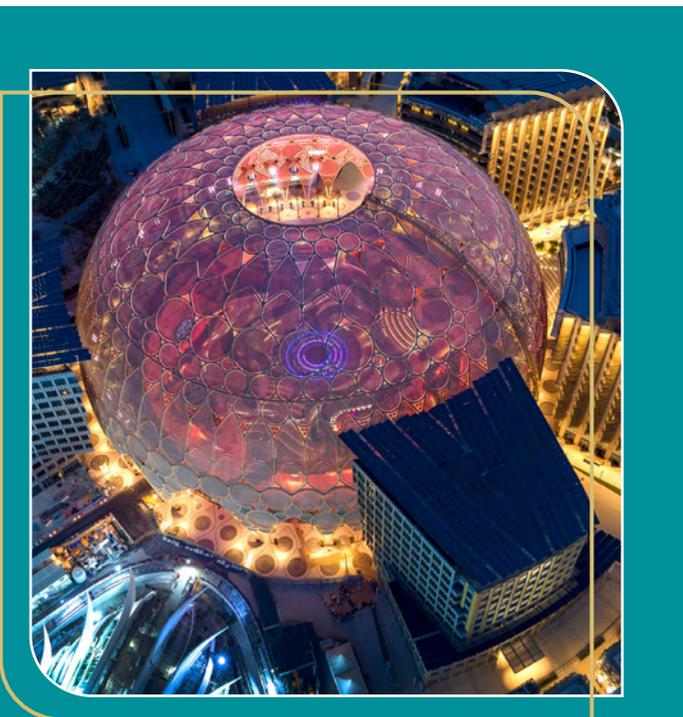
Expo 2020 marked a number of landmark achievements during its six-month duration, including many that set new benchmarks, not only for World Expos, but for mega-events and a range of industries and sectors more widely.

Expo 2020 introduced a ‘One Nation, One Pavilion’ policy for the first time in World Expo history, enabling all countries to participate on an equal footing. It was also the first World Expo where all African nations were present, in addition to the African Union.

The most sustainable World Expo ever, Expo 2020 Dubai implemented and showcased tangible solutions including an innovative waste management programme and the iconic net-zero-energy Terra – The Sustainability Pavilion. To date, 123 Expo-built permanent buildings are certified by LEED (Leadership in Energy and Environmental Design)

Expo 2020 was also the first World Expo to receive the event-specific Gender Equality European and International Standard for workplace equality, and the first World Expo in more than 50 years to host a standalone pavilion dedicated to women.

Expo 2020’s pioneering Virtual Expo platform, which offered live streaming proved hugely popular, racking up around 250 million online visits during the event’s six-month run, with Live@Expo, allowing virtual visitors to tour Expo 2020 Dubai live, reaching 18 million viewers. Expo 2020 Dubai’s Opening and Closing Ceremonies have, together, been viewed more than 13 million times, while Salman Khan: The World Da-Bang Tour and the Black Eyed Peas concert have attracted around 30 million and 25 million views respectively.



EXPO 2020 DRIVES GLOBAL CHANGE

Expo 2020 visitors overwhelmingly embraced the event's core theme of 'Connecting Minds, Creating the Future', with a survey revealing the vast majority of respondents were inspired to make positive changes to their lives after visiting the event.

According to the data, more than a third of visitors toured at least one Thematic Pavilion. At Terra – The Sustainability Pavilion, 96 per cent of 19,054 people surveyed promised to make sustainable lifestyle changes, while at Alif – The Mobility Pavilion, 91 per cent of 20,367 surveyed said they would take action to create a better future. Of around 1.4 million visitors who toured Expo's Mission Possible – The Opportunity Pavilion, 90 per cent pledged to make a positive change.

More than 14,000 participants, from government and private sector leaders to academics and change makers, came together to tackle some of the greatest challenges facing global communities, with a focus on inspiring and empowering the next generation as part of the Programme for People and Planet.

Expo 2020 Dubai hosted 52 World Majlis sessions, bringing together more than 420 participants from 66 countries, resulting in more than 130 hours of thought-provoking conversations.

In addition, Expo Live, Expo's global innovation and partnership programme, backed 140 projects from 76 countries, benefitting 5.8 million-plus people worldwide.

BUSINESS BENEFITS FROM EXPO'S SUCCESS

Expo 2020 also provided an unprecedented opportunity for local and international businesses to forge new connections and partnerships for the benefit of Dubai's economy.

From the outset, one of Expo's key aims was to foster public-private partnerships to drive sustainable and meaningful economic growth. A commitment to award 20 per cent of direct spend to UAE-based small- to medium-sized enterprises (SMEs) was also exceeded, with AED 6.8 billion of contracts awarded to the sector. The result of a number of initiatives designed to enhance the integration of SMEs, the strategy honours the UAE's wider efforts to build a more resilient and diversified economy and provides a significant contribution to a vital sector of Dubai's vibrant economy. Some 76% of companies in Dubai also registered growth in their businesses during the event.

Expo 2020's Thrive Together programme offered delegates access to a range of curated networking, knowledge-sharing and thought-leadership events, as well as tailored products and services enabling them to explore new business opportunities, while

an integrated Business Calendar provided real-time information on all business events taking place across the Expo site, including in the Dubai Exhibition Centre (DEC), International Participants' pavilions, and the Expo 2020 Business Connect Centre.

Three Global Business Forums (GBFs), including the first edition of Global Business Forum ASEAN, were staged at DEC featuring a host of prominent speakers, leading decision-makers and industry experts who together explored business synergies and addressed obstacles to growth, driving trade and investment and fostering economic development.

BUILDING ON EXPO'S LEGACY FOR FUTURE GENERATIONS

The long-term impact of Expo 2020 has been central to planning from the earliest stages of the journey, with the event's legacy crossing the social, economic, physical and reputational realms, and supporting the vision and ambitions of Dubai and the UAE more widely.

For example, while the Expo workforce was made up of people of 135 different nationalities, highlighting the diversity of the UAE, nearly a third were UAE Nationals. 65% of the Emirati workforce were women, and 53% of all UAE Nationals were between the ages of 20-30 years old, reflecting the UAE's efforts to empower and inspire the next generation and build a robust knowledge economy.

Expo's Volunteer Programme – the largest of its kind in the history of the UAE, with over 30,000 volunteers clocking up more than one million working hours – will continue under the auspices of the Ministry of Tolerance.

In terms of the physical legacy and the site itself, more than 80 per cent of what was built for the event will remain. This includes Terra – The Sustainability Pavilion, which will be transformed into a Science Centre, inspiring visitors of all ages, while the Vision Pavilion, conceived as a gift and tribute to His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai will also continue to welcome visitors.

Expo 2020 Dubai has left a lasting legacy and is a stepping-stone to building a resilient future shaped by innovation, international cooperation, and a more competitive and diversified economy. District 2020, the dynamic Dubai development that has evolved from Expo 2020, will repurpose 80 per cent of the Expo's built environment into an integrated mixed-use community that will continue to attract businesses and people to live in, work and visit, and enjoy, as well as being a new tourism attraction.

EXPO 2020 IN NUMBERS



250+ MILLION

Virtual visits to Expo 2020



24+ MILLION

Recorded visits
from 1 Oct. 2021 to 31 Mar. 2022



1+ MILLION

School children visited Expo
as part of the Expo Schools
Programme's experiences



107,000

Visits from people
of determination



30,000

Volunteers from 135 countries
worked at Expo 2020 racking up
more than 1 million
work hours combined



16,000

Government officials, including,
heads of state, presidents, prime
ministers and ministers, visited
Expo 2020



195

National Days and Honour
Days celebrated at Expo 2020



192

Participating countries
14 multilateral organisations
and 22 Partners participated



178

Nationalities of Expo visitors



98

The age of the oldest
visitor to Expo 2020



49%

Of visitors attended
Expo 2020 more than once



1 of 3

Visitors came from overseas



COVID-19 RECOVERY

THE RETURN TO NORMAL

Dubai's world-leading approach to combating COVID-19 has enabled its tourism sector to thrive in the wake of the pandemic

As one of the world's first major destinations to safely reopen its borders to international visitors in July 2020, Dubai has continued to set an example for all other cities to follow in its handling of the COVID-19 pandemic.

Its enviable reputation in this respect has enabled its tourism industry to continue to thrive and outperform the majority of its international peers over the past two years, setting the benchmark for all others to follow, particularly in 2022, as global travel slowly recovers to pre-pandemic levels.

Comprehensive public health and safety measures combined with a world-leading national vaccine programme – which has seen the UAE declared the world's most-vaccinated country with more than 97% of its population declared fully vaccinated against COVID-19 – provided the impetus for the industry's success in 2021.

While many major destinations remained in lockdown at the beginning of the year, Dubai was fully open and was welcoming visitors from across the world. Dubai received 1.7 million international visitors between July and December 2020 and 2.5 million international visitors in the first half of 2021.

While both were remarkable results, the H1-2021 figure is even more impressive given it was more than five times the number of people who visited the whole of the United Kingdom during the same period.

This impressive performance underlined Dubai's leading role in spearheading the global tourism recovery and

highlighted the city's efforts to combat the threat posed by COVID-19 to residents and visitors alike.

RAPID RECOVERY TESTAMENT TO VISIONARY LEADERSHIP

Dubai's robust tourism rebound is testament to the success of its multi-pronged strategy designed to combat COVID-19. Inspired by the visionary leadership of His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, Dubai rolled out a comprehensive citywide strategy designed to mitigate the impact of the virus, enabling it to safely reopen its economy and welcome back international visitors.

A variety of safety initiatives were launched, with a particular focus on effective testing and vaccination programmes. The vaccination campaign also covered hospitality employees, starting with a pilot programme that saw more than 10,000 employees of leading hotels on The Palm Jumeirah receiving the vaccines.

The stringent measures were underpinned by the DUBAI ASSURED stamp, a compliance protocol that certifies establishments within the tourism ecosystem that adhere to health and safety protocols.

Dubai's extensive and sustained efforts at containing the pandemic won international recognition with the World Travel & Tourism Council (WTTC) awarding the city a 'Safe Travels' stamp.

The provision of an economic relief package worth more than AED7.1 billion (US\$1.93 billion) combined with a phased reopening of key sectors and Dubai's Department of Economy and Tourism's (DET) strong collaboration with local stakeholders and international partners, helped the industry chart a steady course for recovery.

2021 TOURISM PERFORMANCE OVERVIEW

DUBAI LEADS GLOBAL TOURISM RECOVERY

Dubai's stellar tourism performance in 2021 demonstrated to the world the city's resilience and 'can-do' approach to overcoming the pandemic

Dubai once again demonstrated why it is one of the world's most popular tourism destinations in 2021, with the city welcoming 7.28 million international overnight visitors, marking an impressive rise of 32 per cent year on year (YoY).

A shining light for the global tourism industry throughout the COVID-19 pandemic, Dubai's performance demonstrated to peer destinations what can be achieved through the implementation of a collaborative, multi-dimensional strategy that set the stage to establish the city as one of the world's safest travel destinations.

In line with the vision of His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, Dubai's Department of Economy and Tourism (DET) and industry stakeholders worked in unison to implement a series of world-leading preventative measures designed to safeguard international visitors to the city from the threat of the pandemic.

The success of this strategy was evident in the significant increase in inbound visitation in the second half of 2021, as global travel restrictions eased and international visitors flocked to Dubai, drawn by the city's enduring appeal as well as major events such as Expo 2020, which opened on 1 October.

Dubai welcomed 3.4 million international visitors in the fourth quarter of 2021, which was equivalent to 74 per cent of the total number reported in Q4, 2019, prior to the impact of the COVID-19 pandemic.

This positive trend has continued into 2022, with the city welcoming 3.97 million visitors in the first three months of the year, up from just 1.27 million a year prior. This result bodes well for the next 12 months, as Dubai continues to spearhead the global tourism recovery in the wake of the pandemic.

DUBAI'S HOTEL SECTOR SHOWCASES ITS STRENGTHS TO THE WORLD

Dubai's hotel industry once again demonstrated why it ranks among the world's leading markets, reporting benchmark results that outshone the vast majority of its global peers.

The city's hoteliers reported 31.5 million room nights sold in 2021 – the second highest result on record – marking a 53.7 per cent rise compared to 2020.

To put this figure into perspective, STR reported that Dubai sold as many room nights in 2021 as London, Paris and Oslo combined accounting for almost 1% of all hotel rooms sold worldwide last year.

Dubai's impressive Q4 performance, which resulted in an average occupancy rate of 81.4 per cent – one of the best results on record for this period – further consolidated its reputation as one of the world's top hotel markets and highlighted the city's position at the forefront of the global tourism industry's recovery.

According to data provided by industry analyst STR, hotel room demand on New Year's Eve in Dubai was 2.5 times greater than Paris. This positive trend has continued into 2022, with Expo 2020-driven demand seeing average hotel occupancies hovering above 90 per cent in February and March.

	2013	2016	2018	2019	2020	2021
Hotel Guest Arrivals	11.0M	14.4M	16.2M	17.5M	8.8 M	12.4M
International	81%	79%	77%	76%	48%	47%
Domestic	19%	21%	23%	24%	52%	53%
Room Nights Sold	23.7M	28.0M	30.1M	32.1M	20.5M	31.5M
Total Hotel Room inventory	85K	103K	116K	126K	127K	138K
Available Room Nights	30.2M	36.2M	39.9M	42.9M	37.8M	47.1M
Occupancy	81%	78%	76%	75%	54%	67%

VISA UPDATE

VISA INITIATIVES BOOST DUBAI'S APPEAL TO GLOBAL ENTREPRENEURS AND INVESTORS

Dubai's enhanced visitor and residency visa programmes have made it easier for foreigners to live, work and play in the emirate

As part of Dubai's bid to boost tourism growth while establishing itself as the world's most liveable city, government authorities continued to build on its portfolio of visitor and residency visa categories and programmes in 2021, making it simpler and easier for foreigners to visit, do business or build a life in the city.

The Golden Visa for entrepreneurs, investors and specialised talent, as well as the Retire in Dubai and Virtual Working programmes, have all enhanced Dubai's appeal to new market sectors, while providing more flexibility and options for talent looking to work and reside in Dubai.

Over the past 18 months, government authorities have expanded the Golden Visa programme – which offers up to 10-year renewable residency visas to talented students, professionals and entrepreneurs – to new professions and market sectors, including insurance, finance, advanced technology, R&D, medicine, real estate and university education.

Highlighting the programme's long-term ambitions, authorities announced in July 2021 plans to grant Golden Visas to 100,000 entrepreneurs, owners of enterprises, and start-ups specialised in coding.

Golden Visas are also available to property investors in the emirate. The success of this programme was highlighted by Dubai ranking first regionally and 11th globally among 25 cities in the "Best Business Cities in Granting Residency Visas to Investors" index, published by UK-based firm Henley & Partners, which specialises in residency and citizenship advice.

Dubai's Virtual Working programme, which allows foreign workers to relocate to Dubai from outside the UAE and work remotely for their present employer, proved hugely popular throughout the pandemic.

The programme, which provides for one-year renewable visas, enables successful applicants to take advantage of Dubai's robust and seamless digital infrastructure, global networking opportunities and zero income tax environment.

The huge success of the scheme has seen Dubai rapidly rise up the global rankings of most appealing destinations for remote workers.

In 2021, Dubai was recognised among the world's fastest-growing remote working destinations in Nomad List's survey of 150,000 members, while Nestpick ranked Dubai second among 75 cities in its 2021 Work-from-Anywhere Index, based on factors including the quality of infrastructure, taxes, freedom, safety and liveability.

The Retire in Dubai scheme has also proven a hit with expats and foreigners aged over-55, who are keen to stay in the emirate long term and take advantage of the city's unique and distinctive lifestyle during their retirement years.

In 2021, Dubai also launched its Creative Economy Strategy with a view to establishing itself as a global hub for innovation by 2025. As part of the plan, Government authorities aim to increase the number of creative and cultural institutions operating in Dubai to 15,000, while providing 140,000 jobs across the creative industries.

In line with this strategy, the Dubai Culture and Arts Authority (Dubai Culture) in coordination with the General Directorate of Residency and Foreigners Affairs-Dubai (GDRFA) began offering 10-year cultural visas to accomplished creative talents from the fields of literature, culture, fine arts, performing arts, heritage, history and knowledge-related sectors as well as intellectual and creative industries.

UAE authorities have further expanded the scope of the country's residency visa programme in 2022 to attract new potential source markets and drive the innovation ecosystem. In April, the government announced the introduction of a five-year Green Residency initiative targeting skilled professionals, freelancers, investors and entrepreneurs. Applicants can apply for the visa without requiring a sponsor or employer in the UAE.

In addition to the regular visitor visa, a five-year multi-entry tourist visa has also been introduced. The visa enables successful applicants to stay in the UAE for up to 90 continuous days and can be extended for a similar period, provided that the entire period of stay does not exceed 180 days in one year.



DOMESTIC TOURISM

RISE IN DOMESTIC TOURISM BOOSTS INDUSTRY'S FORTUNES

Dubai's impressive tourism performance in 2021 can be traced in part to the unprecedented rise of the UAE's domestic tourism sector

One of the more unexpected consequences of the COVID-19 pandemic has been its positive impact on accelerating growth in the UAE's domestic tourism industry.

The UAE Strategy for Domestic Tourism, which launched in December 2020 in the midst of the pandemic, aims to double domestic tourism revenues by 2030 and achieve a greater balance between domestic and international tourism.

The industry's impressive performance over the past 12 months shows this ambitious strategy remains well on track to meeting its objectives.

The rise of the UAE's domestic tourism industry can best be seen by its positive and transformative impact on Dubai's hotel market dynamics in 2021.

In 2021, domestic travellers accounted for 53 per cent of the 12.4 million hotel guest arrivals registered in Dubai, despite the overall increase in the number of international travellers who visited the city during this time.

To put this result into perspective, domestic travellers accounted for just 24 per cent of the 17.5 million guest arrivals recorded in 2019, pre-pandemic. In 2020, as COVID-19 lockdowns severely restricted global travel, domestic travellers accounted for 52 per cent of the mix, but at significantly lower base of 8.8 million guest arrivals.

What makes the 2021 result even more impressive is that domestic travellers accounted for 11 million of the 31.5 million hotel room nights sold last year, compared to just 7.1 million room nights in 2019 and 9.5 million in 2020.

The rise in domestic tourism has been as relentless as it has been impressive. The vast majority of hotel operators in Dubai now offer regular staycation packages targeting domestic travellers, while many tourism attractions target residents with discounted rates and incentives.

ARRIVALS TO HOTELS BY EMIRATE

DOMESTIC ARRIVALS (Total Jan-Dec 2021)



ARRIVALS INTO DUBAI BY EMIRATE (in 000s)



EVOLVING SHARE OF DOMESTIC ROOM NIGHTS



THE WORLD'S COOLEST WINTER CAMPAIGN BUILDS ON 2020 SUCCESS

After helping spearhead a record domestic tourism performance in 2020, The World's Coolest Winter campaign returned for a second year, making a similarly impactful statement in 2021.

Officially launched in December by His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, the national domestic tourism campaign boosted hotel revenues across the UAE by an estimated AED1.5 billion (US\$314 million), up 50 per cent year on year for the period.

The Campaign also raised the number of domestic from 950,000 to 1.3M, an increase of 36 per cent year on year, while the average hotel occupancy rate rose seven percent to 73 percent for the same period.

GLOBAL PRAISE FOR DUBAI

Dubai topped more major international rankings than ever in 2021

Dubai once again proved why it is recognised among the world's most important tourism, business and investment hubs in 2021, topping a number of influential reports that together demonstrate its universal appeal

TRIPADVISOR TRAVELLERS' CHOICE AWARDS

Best Global Destination
2022 ranking: 1st | 2021 ranking: 3rd

Best Destination for City Lovers
2022 ranking: 1st

Global significance:
TripAdvisor's annual Travellers' Choice Awards are based on the feedback of millions of TripAdvisor users worldwide, making it one of the world's most-respected awards programmes.

JULIUS BAER 2021 LIFESTYLE INDEX

2021 ranking:
1st in MEASA

Global significance:
Dubai was named the MEASA region's top lifestyle destination in Julius Baer's 2021 Lifestyle Index, which studies lifestyle benefits in 25 cities worldwide

RESONANCE CONSULTANCY'S WORLD'S BEST CITIES REPORT

Ranking:
5th

Global significance:
Dubai was named the world's most diverse city and fifth best overall in Resonance Consultancy 2021 World's Best Cities Report, ahead of Tokyo, Singapore, Doha and Abu Dhabi

BEST BEACH CITY FOR DIGITAL NOMADS

2021 ranking:
1st

Global significance:
Dubai was the world's best beach city destination for digital nomads in 2021, according to global employment specialist resume.oi

WORLD'S FASTEST-GROWING REMOTE WORKING DESTINATIONS

2021 ranking:
6th

Global significance:
Dubai ranked 6th overall in Nomad List's 2021 ranking of the world's fastest-growing remote working destinations, based on more than 170,000 individual user check-ins.

LIVEABILITY

DUBAI: THE 'WORLD'S MOST LIVEABLE CITY'

Establishing itself as the world's best city to live in, work and visit is key to Dubai's long-term tourism diversification strategy.

Renowned for its ultra-modern social and economic infrastructure, unrivalled lifestyle offerings and world-class career opportunities, Dubai is already recognised among the world's most liveable cities. However, this reputation is set to grow further in the coming years, as new initiatives showcase its unbeatable appeal to visitors and expats seeking a better future for themselves and their families.

Home to a fast-growing population of more than 3.3 million people and 200+ nationalities, Dubai was named the world's most diverse city in Resonance Consultancy's 2021 World's Best Cities Report.

Dubai's growing reputation as the Middle East and North Africa's first truly global city and one of its economic powerhouses is also reflected in its growing international profile.

The world's fourth-most visited destination in 2019, Dubai is home to the world's busiest international airport. It is also the region's largest and most influential financial hub and a magnet for foreign investment, regularly ranking among the world's top markets for foreign direct investment (FDI) projects.

Given its unrivalled economic status, tax-free environment and exciting lifestyle, it is easy to see why Dubai was named the fourth best city in the world to relocate to in UK-based Money's 2021 Relocation Report, which analysed the work-life benefits provided by 84 major cities worldwide.

Dubai's Department of Economy and Tourism (DET) is also working with the private sector to promote Dubai as the world's most liveable city. It recently signed a Memorandum of Understanding (MoU) with HSBC Bank Middle East, which will see the bank promote Dubai's quality of life and unique lifestyle to its customers and employees and the city's reputation as a global investment hub.



UNBEATABLE LIFESTYLE APPEAL

Dubai's status as one of the world's most liveable cities is reflected in the quality and diversity of its lifestyle offerings, which makes it truly unique among the world's major cities.

While Dubai is well known as a luxury lifestyle destination, with dozens of five-star hotels spas and ultra-exclusive retailers, the city has also built a reputation as the region's cultural capital.

Dubai's natural attractions, particularly its warm climate and year-round sunshine, are also undoubtedly a major selling point. In its 2021 Relocation Report, UK-based Money rated Dubai as offering the best climate of 84 popular expat destinations worldwide, declaring its weather 10 out of 10. It also rated Dubai the third-best coastal city to relocate to worldwide.

Dubai is officially recognised by the United Nations among the top two happiest cities in the Middle East and North Africa (MENA) region, while the UAE has ranked as the Arab world's happiest country for six consecutive years from 2015 to 2021.

Dubai ranked 39th overall in the UN's 2020 World Happiness Report, which analyses 186 cities worldwide. The report placed Dubai ahead of destinations including Paris (43rd), Singapore (49th), Riyadh (62nd), Tokyo (79th) and Istanbul (115th).



URBAN MASTER PLAN REFLECTS LONG-TERM FOCUS ON LIVEABILITY

In line with the vision of His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, the city is prioritising sustainability and liveability in its future development plans.

This strategy lies at the core of the ambitious 2040 Urban Master Plan, which provides a sustainable development roadmap for the city over the next 20 years.

The Plan, which is predicated on Dubai's population rising from 3.3 million today to 5.8 million within the next 20 years, estimates that parkland and recreational spaces will account for 60% of Dubai's total area by 2040, more than double the allocated space today.

Green corridors will be established linking the main urban areas, providing sustainable transit routes for the city's residents with the addition of bike lanes and mass transit services.

In terms of leisure options, the Plan calls for an increase in total space dedicated to hotels and tourism activities by 134% compared with today, while the area used for commercial activities will increase to 168 sq km.

Meanwhile, the total length of public beaches in the emirate will increase by as much as 400% in 2040.

The Plan aims to complement Dubai's long term investment plans for new schools, hospitals, utilities and other public services.

The Plan will also help consolidate Dubai's reputation as a leading business and tourism investment destination, while helping establish it as the world's most liveable city.

KEY SOURCE MARKETS & VISITOR TRENDS

KEY SOURCE MARKETS SPEARHEAD GROWTH IN INTERNATIONAL VISITORS

Visitor numbers from Dubai's top source markets rebounded in 2021, as COVID-19 restrictions were phased out worldwide

Dubai's reputation as one of the world's safest travel destinations throughout the pandemic continued to pay dividends in 2021. With global travel ramping up, particularly in the second half of the year, visitor numbers from many of the city's largest source markets recovered strongly.

India consolidated its position as Dubai's top international visitor source market in 2021, accounting for 910,000 visitors (+5.3 per cent YoY) or 12.5 per cent of the total figure of 7.28 million. India continues to prove crucial to Dubai's long-term tourism growth, with the Asian powerhouse consistently ranking among Dubai's leading business and leisure tourism source markets.

The Kingdom of Saudi Arabia (KSA) claimed second place overall, contributing 491,000 visitors in 2021, up 22.8 per cent year on year. This was a highly impressive result, particularly when considering the Kingdom's efforts to curtail the spread of COVID-19 resulted in the closure of its borders to all inbound and outbound travel from January to mid-May 2021.

The Russian Federation once again proved to be one of Dubai's fastest-growing tourism source markets,

contributing 444,000 visitors, up 50.3 per cent compared to a year prior and accounting for 61.1 per cent of the peak 2019 volume.

The United Kingdom followed closely behind in fourth place with 420,000 visitors, up 7.1 per cent YoY. Traditionally one of Dubai's most important visitor source markets, UK outbound travel remained significantly curtailed in 2021 due to the ongoing impact of the pandemic.

With the UK's economy now fully reopened, we can expect to see a strong resurgence in UK visitor arrivals in 2022, aided by developments including Emirates' phased reintroduction of its regular flight schedule between Dubai and six major UK gateways, with the vast majority of these being A380 services.

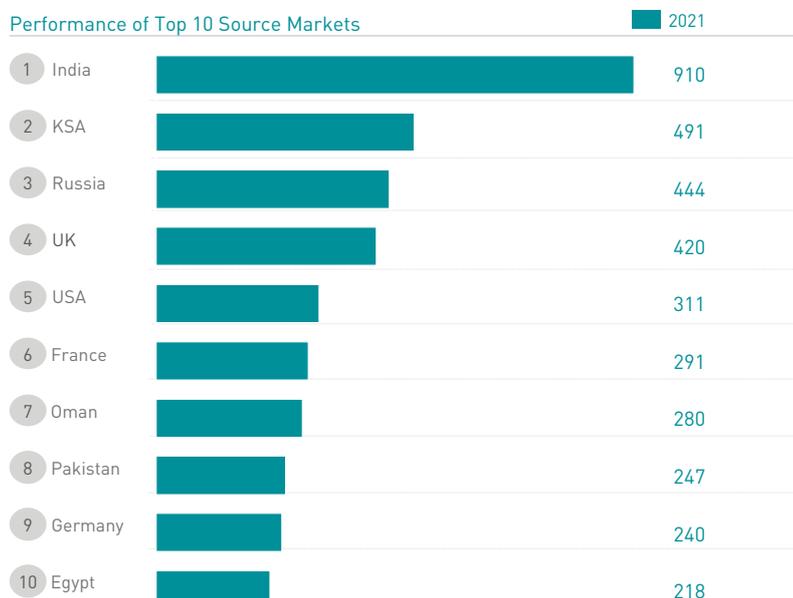
The United States rounded out the top five source markets for 2021 with 311,000 visitor arrivals, up 62.7 per cent from 191,000 in 2020. Dubai's reputation as one of the world's top tourism destinations continues to grow among US holidaymakers and business travellers, backed by concerted and highly successful North American marketing campaigns featuring the likes of Hollywood stars Zac Efron and Jessica Alba, alongside Chris Hemsworth, who partnered with Emirates on its bold Expo 2020 global campaign.

Other notable entries in Dubai's list of top 10 source markets for 2021 included sixth-placed France with 291,000 visitors (up 74.9 per cent YoY), Oman with 280,000 visitors (+16.5 per cent YoY), Pakistan with 247,000 visitors (+16.2 per cent YoY), Germany with 240,000 visitors (+45.7 per cent YoY) and Egypt with 218,000 visitors (+28.2 per cent YoY).

Arrivals from Oman, which has traditionally ranked among Dubai's top five visitor source markets, were significantly curtailed by COVID-19 travel restrictions in 2021, with Omani authorities only fully reopening

TOP 20 SOURCE MARKETS FOR VISITORS TO DUBAI ('000 Visitors Jan - Dec 2021)

Performance of Top 10 Source Markets



Top 11-20 Source Markets

Rank	Country	2021
11	Kazakhstan	164
12	Iran	154
13	Ethiopia	139
14	Ukraine	112
15	Sudan	111
16	Italy	106
17	Israel	97
18	Netherlands	89
19	Lebanon	81
20	Jordan	78

the country's land borders with the UAE for vaccinated travellers on 1 September.

Outside the top 10, Israel proved one of Dubai's fastest-growing tourism source markets, with more than 97,000 visitors in 2021, which marked the first full-year result since the signing of the Abraham Accords in August 2020. Given the prospect of increased bilateral trade, investment and tourism ties between the UAE and Israel, alongside a massive 484 per cent rise in airline seat capacity between Dubai and Tel Aviv in 2021 alone, Israel's status as a major visitor source market is certain to grow in the coming years.

REGIONAL SOURCE MARKETS OVERVIEW

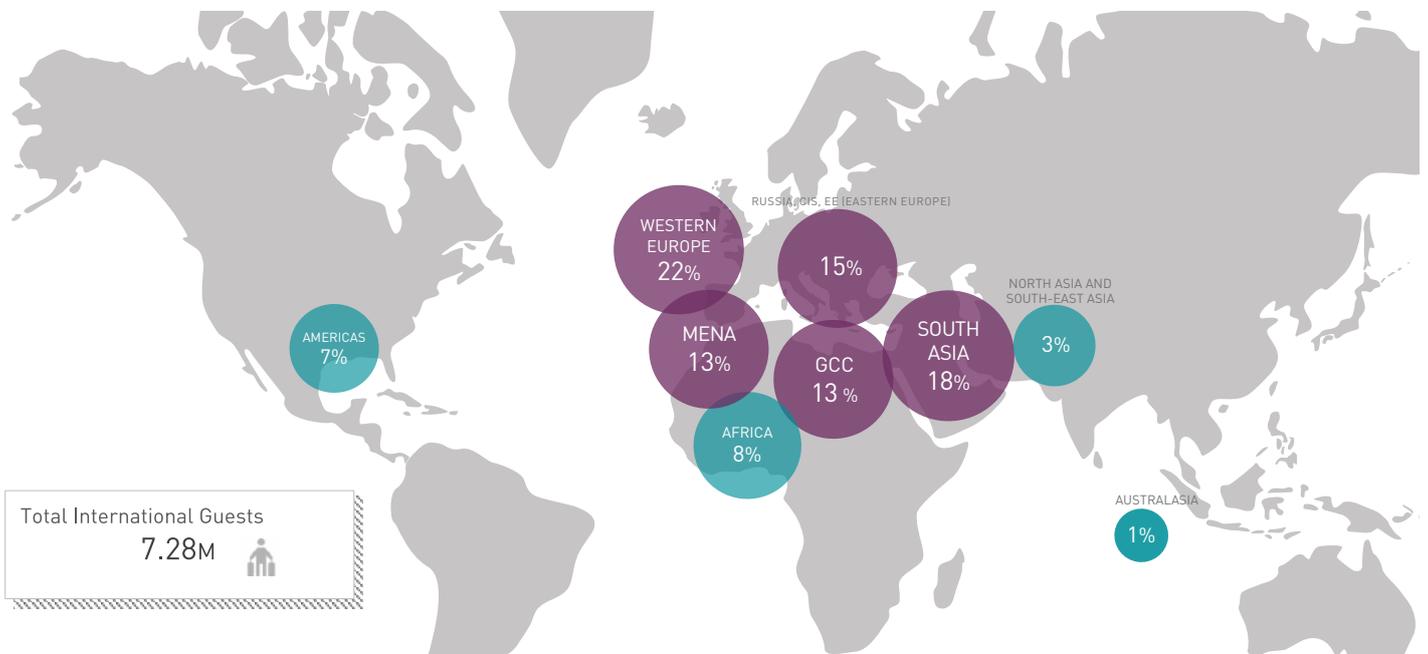
Western Europe retained its position as Dubai's top

regional source market, accounting for 22 per cent of the 7.28 million international overnight visitors reported in 2021. South Asia ranked second with 18 per cent of the total, down 3 per cent compared to 2020 but up 2 per cent compared to 2019 (ie pre-COVID-19).

Russia, CIS and Eastern Europe backed up its reputation as one of Dubai's most important regional growth markets, ranking third with 15 per cent of the total global share, up from 11 per cent in 2020 and 9 per cent in 2019.

The Middle East and North Africa (MENA) and the GCC both accounted for a 13 per cent share of the total respectively, reflecting Dubai's status as the region's favourite holiday and business travel destination, while Africa (8 per cent) and the Americas (7 per cent) were other notable inclusions in the list of the emirate's top regional source markets for 2021.

SOURCE OF VISITORS BY REGION [% Jan - Dec 2021]



VISITOR TRENDS

FAMILIES FLOCK TO DUBAI'S WORLD-CLASS ATTRACTIONS

International holidaymakers not only stayed for longer in Dubai, but were more satisfied than ever during their time spent in the emirate

Dubai's reputation as one of the world's most family-friendly holiday destinations was once again brought to the fore in 2021, with family groups and couples accounting for 73 per cent of all visitors to the city last year.

According to the findings of the 2021 Dubai International Visitor Survey (DIVS), the vast majority (71 per cent) of international visitors who travelled to the emirate did so

for leisure, while they also chose to enjoy the city for longer, with the average length of stay for this category rising to 8.2 days, up from 7.5 days in 2020 and just 6.1 days in 2019. By way of comparison, the average length of stay across all international visitor categories was 9.6 days in 2021.

Business travellers accounted for 12 per cent of all visitors to Dubai last year, which was consistent with 2020. They also chose to stay for an average of 7 days, which was again similar to 2020 but considerably longer than the 4.7 days recorded in 2019.

The relative proportion of travellers who visited Dubai to see friends and relatives in 2021 rose to 16 per cent, up three per cent compared to 2020. Their average length of stay did however decline from 22 days to 16.9 days in 2021, a trend that may reflect the loosening of COVID-19 travel restrictions in their home countries and the welcome return of short-break getaways.

KEY ATTRACTIONS DEMONSTRATE THEIR ENDURING APPEAL

Dubai's rapidly growing collection of world-class tourism attractions boosted the city's global profile in 2021, with key openings including Ain Dubai – the world's largest ferris wheel which opened in October on Bluewaters Island – drawing visitors to the city.

In terms of top tourism attractions, Dubai Mall once again proved itself as Dubai's most popular destination, attracting 98 per cent of all international visitors in 2021.

Dubai's global status as a leading beach holiday and leisure destination was reflected by the fact its fast-growing collection of beachside and marine attractions welcomed 88 per cent of all international visitors to the city in 2021, compared with the 66 per cent recorded in 2020. The Dubai Fountain also demonstrated its enduring appeal among international visitors, ranking third most popular overall with 81 per cent.

Other fast-growing tourism attractions included the Dubai Water Canal, which attracted 17 per cent of all visitors last year, up from just 3 per cent a year prior, and Dubai's water parks, which welcomed 18 per cent of visitors (+6 per cent YoY).

Expo 2020 Dubai also demonstrated its global appeal by attracting 50 per cent of all international visitors who travelled to Dubai in the fourth quarter of 2021.

VISITOR SATISFACTION AT AN ALL-TIME HIGH

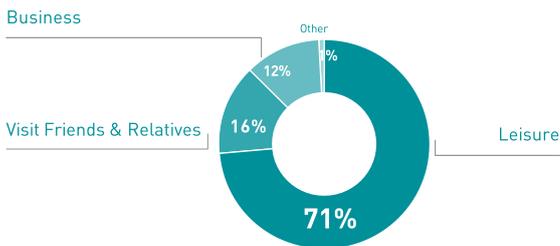
Reflecting the overwhelmingly positive sentiment expressed by international travellers who visited Dubai in 2021, the city achieved a net satisfaction score of 99.9 per cent last year, demonstrating the tourism sector's consistent ability to deliver the highest quality experiences to visitors supported by world-class health and safety measures.

This stellar performance also resulted in an increase in the number of visitors who said they would recommend Dubai as a top destination to family, friends and colleagues, with 90 per cent describing themselves as 'active advocates and ambassadors' for the city following their stay, up from 83.4 per cent in 2020.

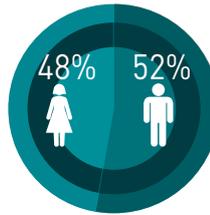
This development also aided Dubai's net promoter score (NPS), which rose to a record 99.9 per cent in 2021 – consistent with the 2020 result of 99.4 per cent, highlighting the overwhelmingly positive reflection of Dubai's brand reputation globally.

VISITOR TRENDS

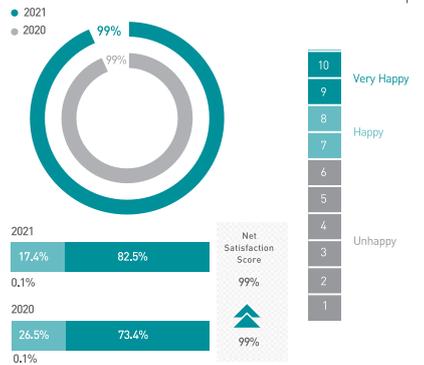
PURPOSE OF VISIT



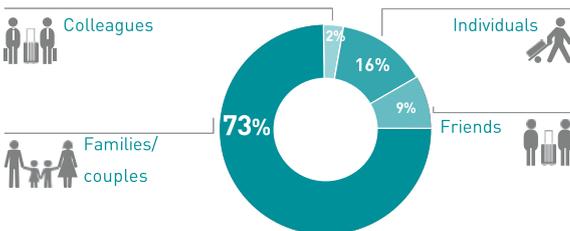
GENDER



OVERALL SATISFACTION



PARTY MAKE-UP



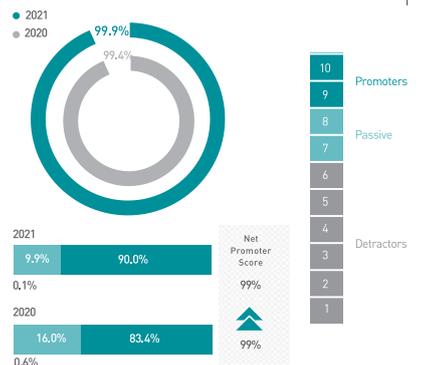
AVERAGE PARTY SIZE



LENGTH OF STAY



ADVOCACY



Source: Dubai International Visitor Survey 2021

HOTEL INDUSTRY PERFORMANCE

HOTEL INDUSTRY BENEFITS FROM IMPRESSIVE TOURISM PERFORMANCE

Dubai's hotel sector rebounded strongly in 2021, reporting stellar results across all key performance indices

Dubai's hoteliers cast off the lingering impacts of the COVID-19 pandemic to report some of their strongest results on record in 2021.

Aided by Dubai's impressive tourism-driven economic recovery and a major rise in the number of domestic guests, the city's hotel industry reported the second highest number of room nights sold on record, with 31.5 million (+53.7 per cent YoY), comparing favourably with the 2019 pre-pandemic peak of 32.1 million.

Hoteliers also saw strong growth on the back of the post-pandemic recovery, with the city's average daily rate (ADR) rising 31.4 per cent YoY to AED451 and revenue per available room (RevPAR) up 62.2 per cent to AED301.

The average occupancy rate stood at 67 per cent, up from 54 per cent in 2020 but still marginally down on the 75 per cent recorded in 2019.

Dubai's hotel guestroom inventory – the growth of which was curtailed in 2020 due to the broader impacts of the pandemic – once again expanded in 2021, aided by the opening of 55 new hotels across the city.

In fact, guests could choose from a total of 755 hotels and 137,950 rooms in 2021, compared to 711 hotels housing 126,947 rooms at the end of 2020.

Guests also spent longer time in Dubai's Hotels, with the average length of stay reaching 4.6 nights, up from 4.2 nights a year prior.

Despite the impact of the pandemic in 2020, the hotel industry continues to demonstrate its importance to Dubai's macroeconomic growth. Its impressive overall performance in 2021 highlights the fact it is fundamentally stronger than it was prior to the pandemic, with the rise in domestic tourism providing a sound base for its continued growth moving forward.

STRONG HOTEL PERFORMANCE SURPASSING PREPANDEMIC LEVELS IN Q4-2021 [Q4 2021 | Q4 2020 | Q4 2019]

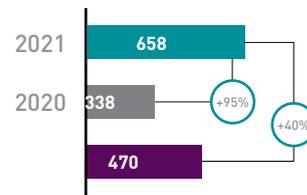
OCCUPIED ROOM NIGHTS Million



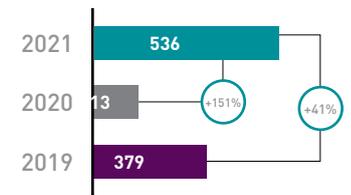
GUESTS' LENGTH OF STAY Nights



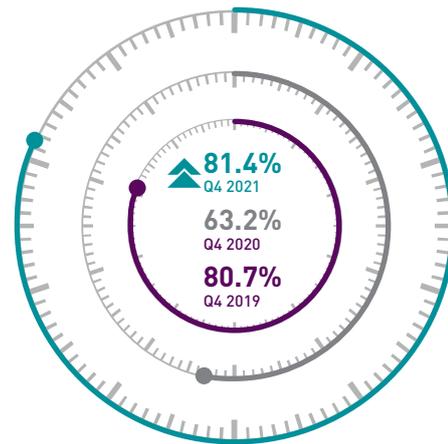
AVERAGE DAILY RATE AED



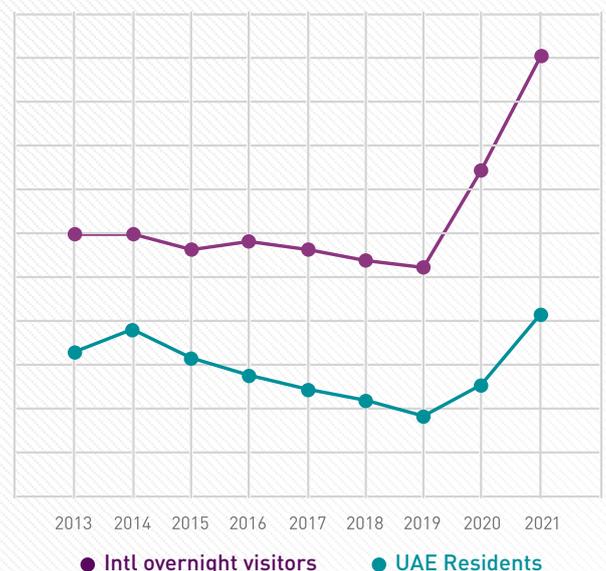
REV PER AVAIL. ROOM AED



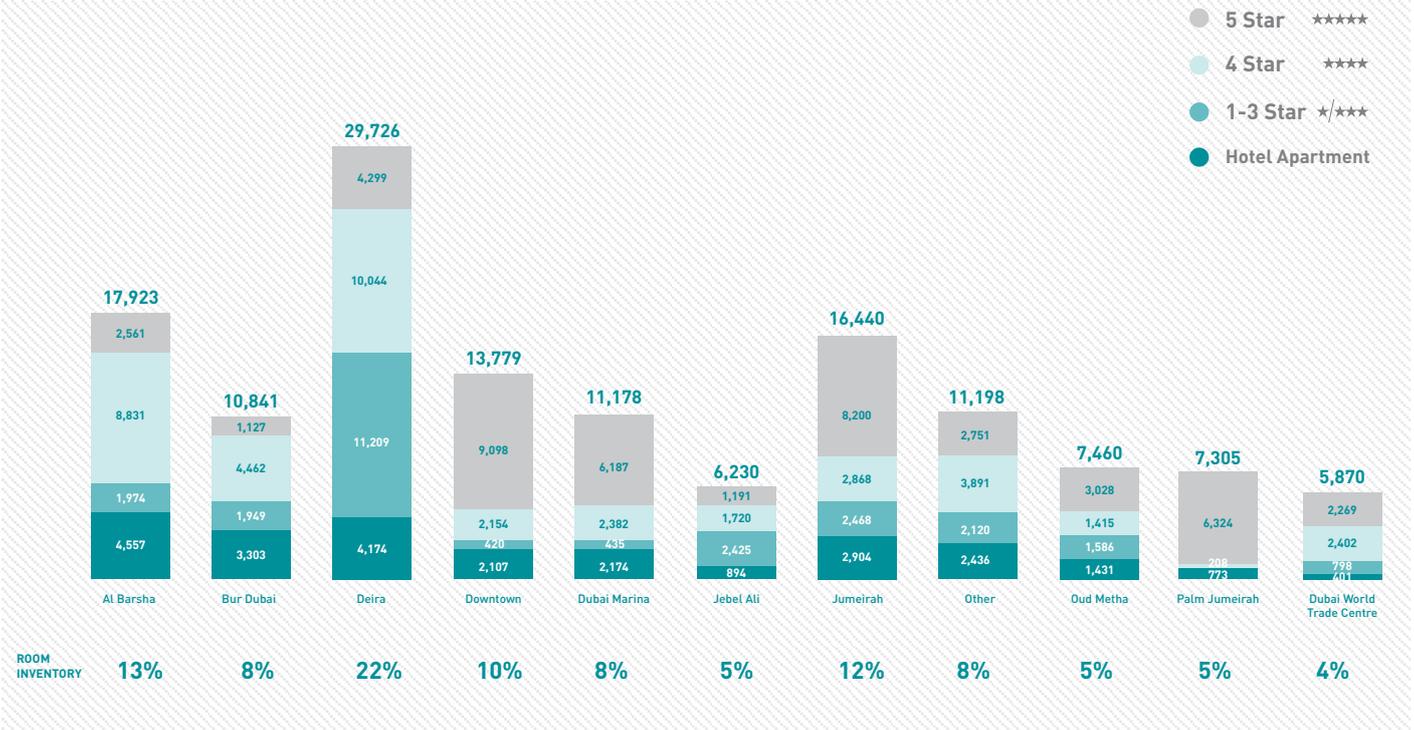
AVERAGE OCCUPANCY



AVERAGE HOTEL LOS [IN NIGHTS]



NUMBER OF ROOMS AVAILABLE BY LOCATION



Q4 PERFORMANCE BODES WELL FOR FUTURE GROWTH

The opening of Expo 2020 Dubai on 1 October played a major role in driving the industry's impressive performance in the final quarter of 2021.

According to data provided by STR, the industry's performance in December was the best since 2015. Boosted by Expo 2020 demand and the holiday season, Dubai's hotel industry reported its highest monthly room rates in six years, while the market's absolute ADR of AED949.64 (US\$259) and RevPAR of AED734.47 (US\$200) were the highest for any month since January 2015 and March 2015, respectively.

New Year's Eve provided an even greater boost to the industry's fortunes, with the citywide ADR rising to a remarkable AED1,963.67 (US\$534.62) – the highest one-day figure ever recorded in Dubai according to STR – while the one-day RevPAR figure of AED1,743.89 (US\$474.79) was the highest since 31 December 2015 (AED1,768.85).

DEVELOPMENT PIPELINE HIGHLIGHTS EFFORTS TO DIVERSIFY ACCOMMODATION MIX

While Dubai has long been recognised among the world's top luxury travel destinations, concerted efforts to broaden its appeal to new visitor categories and undertapped regional markets have proven key to the unprecedented growth of its tourism sector over the past decade.

Key to its strategy in this respect has been the rapid diversification of its accommodation offering. From

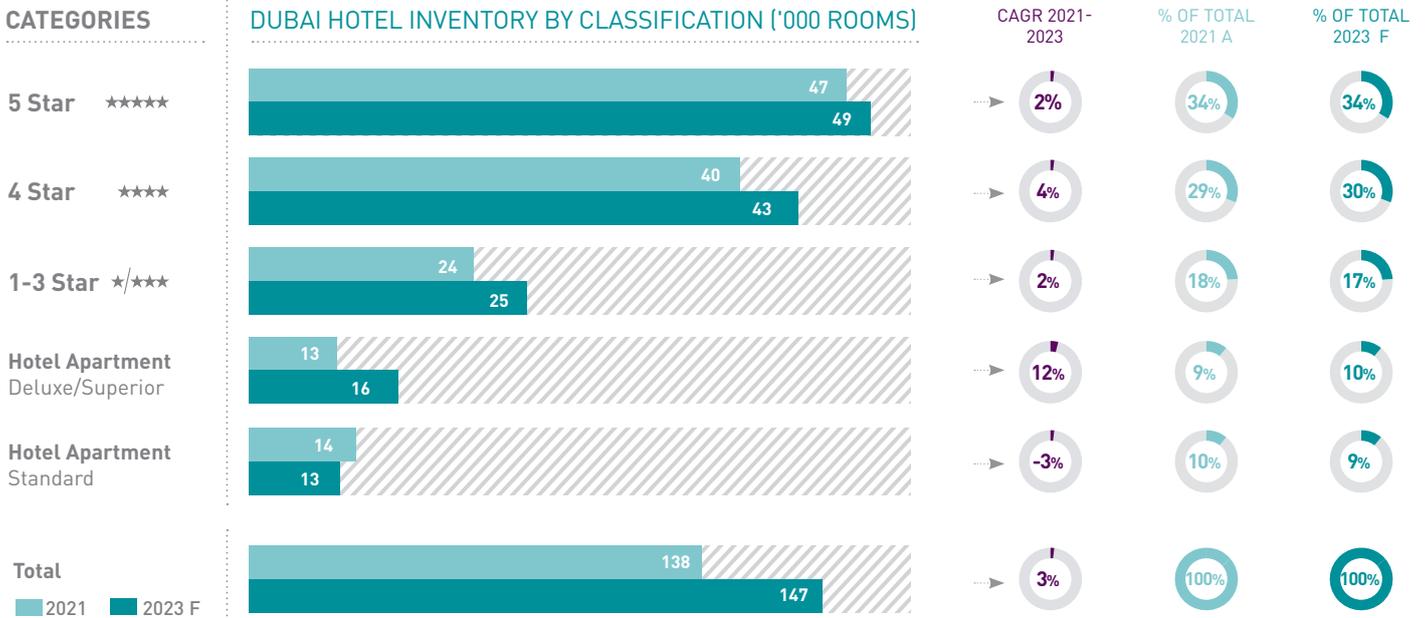
holiday homes, serviced apartments, and boutique B&Bs to budget, midscale and upper-midscale hotels, Dubai today offers a vast array of accommodation options designed to suit all traveller tastes and budgets.

The rapid growth of the city's holiday home rental market highlights the market's shifting dynamics. When the market launched in 2015, 1,641 properties were officially made available for short-term holiday lease, with the occupancy rate reaching 49 per cent. In 2021, the holiday homes sector celebrated its most successful year to date, with the citywide occupancy rate reaching an all-time high of 59 per cent across an inventory of 13,722 properties. The sector's ADR was also the highest on record, reaching AED963.10 (US\$262.21), up from AED801.30 (US\$218.16) in 2020.

While Dubai's world-renowned collection of five-star hotels and resorts still account for the largest proportion (34 per cent) of guestrooms currently available in the city, looking ahead, it is the four-star hotel and deluxe hotel apartment categories that dominate the development pipeline through 2023.

Dubai's four-star guestroom inventory is expected to increase at a compound annual growth rate (CAGR) of 4 per cent from 2021 to 2023, while its deluxe hotel apartment is forecast to expand at 12 per cent CAGR during the same period. By comparison, the city's five-star guestroom inventory is forecast to grow by 2 per cent CAGR from 2021 to 2023.

By 2023, Dubai will be home to one of the world's largest and most diverse hotel guestroom inventories, with the total number forecast to reach 146,526, up from 137,950 in 2021.



MARKETING HIGHLIGHTS

STAR-STUDED CAMPAIGN SHOWCASES DUBAI'S STRENGTHS TO THE WORLD

DET's Hollywood-inspired Dubai Presents campaign highlighted Dubai's enviable reputation as one of the world's safest destinations during the pandemic

Dubai consolidated its status as one of the world's most-popular travel destinations in 2021 on the back of a highly sophisticated, yet quirky, international marketing campaign that highlighted the city's unique attractions to potential visitors across the globe.

Dubai Presents, the high-profile, multi-platform 2021 campaign starring Hollywood icons Jessica Alba and Zac Efron, is the latest in a string of highly successful international marketing initiatives that have tapped A-list actors and international celebrities to showcase the city's remarkable natural and cultural diversity to the world.

It follows in the footsteps of A Story Takes Flight, starring Hollywood A-listers Gwyneth Paltrow, Kate Hudson and Zoe Saldanha, and the award-winning #BeMyGuest, featuring Bollywood superstar Shah Rukh Khan, as well as countless other campaigns led by prominent regional celebrities and influencers, in addition to various digital activations.

By enlisting international celebrities, influencers and community personalities, the Dubai's Department of Economy and Tourism (DET) continues to create a steady stream of popular ambassadors and advocates to constructively help narrate Dubai's story.

In the case of Dubai Presents, Alba and Efron's on-screen chemistry helps showcase the vast array

of attractions and experiences global travellers can enjoy during their time in the city and in turn, encourages them to create their own engaging, memorable stories about Dubai.

Directed by acclaimed Hollywood director Craig Gillespie of Cruella fame, Dubai Presents featured a series of blockbuster scripted short films starring Alba and Efron released over the course of 2021 that also shone a spotlight on major events last year, including Expo 2020 Dubai and the UAE's Golden Jubilee celebrations.

The campaign took a unique approach to global destination advertising, using highly stylised film cues to create engaging content, backdropped by some of Dubai's most iconic landmarks and lesser-known locations. Each film thematically reinforced that the city is open for business and is safely welcoming international visitors despite the ongoing global impact of the pandemic.

Dubai Presents, which has included more than unique 2,000 assets in total and has aired in 27 countries across 16 languages via cinema, print, broadcast, out of home, digital and social media channels, has proven one of DET's most successful international campaigns to date. A month after its debut, the first film in the series had generated more than 200 million views worldwide with the entire campaign delivering over 850 million digital views.



GLOBAL MARKETING OUTREACH INITIATIVES TARGET KEY GROWTH MARKETS

The Dubai Department of Economy and Tourism (DET) ramped up its international marketing outreach programmes in 2021, targeting key expansion markets in a bid to build on Dubai's growing reputation as a must-visit destination.

DET staged a series of in-person networking events in key markets including the UK, Russia and the United States, to build on growing momentum in these territories, particularly as each began to wind back their COVID-19 outbound travel restrictions.

While highlighting the diversity of Dubai's tourism offerings to key industry stakeholders, DET also shared its positive industry outlook with partners and leading media organisations. It also provided them with a preview of Expo 2020 Dubai, which opened on 1 October to huge international acclaim.

DUBAI'S RESTAURATEURS DINE OUT ON RISING GLOBAL ATTENTION

Already recognised as the region's leading dining destination, new DET-led initiatives are set to boost Dubai's reputation as a global gastronomy hub.

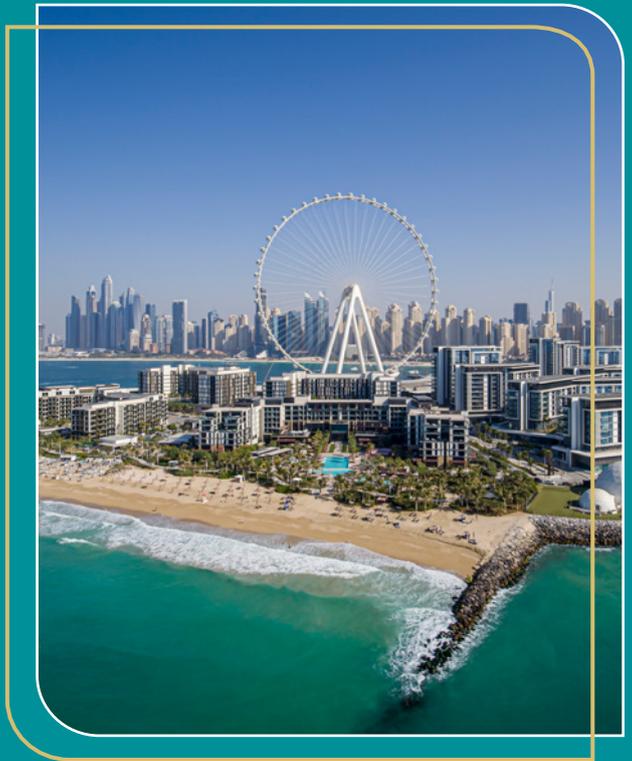
Dubai's reputation as one of the world's top gastronomic destinations continued to grow in 2021.

Home to around 12,000 restaurants and cafes, from homegrown eateries and neighbourhood cafes to Michelin-starred fine dining restaurants, Dubai's inherent diversity reflects the multicultural nature of the city, which is home to more than 200 nationalities.

Over the years, Dubai has grown to become one of the world's most sought-after destinations, and its food scene has matured and evolved alongside this. Reflecting its fast-rising global stature, the city was declared the world's fourth-best destination for food lovers in TripAdvisor's latest Travellers' Choice Awards, which are judged by millions of TripAdvisor users worldwide.

In addition, Dubai dominated the inaugural edition of the Middle East & North Africa's 50 Best Restaurants awards, claiming six places in the top 10 and 16 of the top 50, with casual dining restaurant 3Fils located in Dubai Fishing Harbour claiming overall honours in the list.

Celebrated figures within Dubai's diverse foodie scene were also recognised within the awards, with the city's chefs, culinary innovators and restaurateurs garnering



five of the seven specialty awards including Art of Hospitality Award, Chef's Choice Award and the Best Pastry Chef Award.

Dubai's Department of Economy and Tourism (DET), which has made the city's F&B growth a cornerstone of its tourism development strategy, is rolling out initiatives designed to further elevate Dubai's position as a year-round global gastronomy hub and establish it as the world's best city to live in, work and visit.

In 2021, DET launched its 'Gastronomy Always on Campaign' (GAON), which aims to support the F&B industry through the development of a year-round calendar of culinary events and initiatives. In March 2022, Michelin announced that it will be adding Dubai to its Michelin Guide series with the launch of its first ever Michelin Guide Dubai in the summer bringing additional international recognition to the city's gastronomic offerings. The Dubai restaurant scene will receive further international coverage when the renowned fine-dining food critique brand Gault&Millau launches its first annual Gault&Millau UAE guide this summer.

In addition to the hugely popular annual Dubai Food Festival (DFF), which includes the Dubai Restaurant Week, culinary promotions including Foodie Experiences, Made in Dubai and Hidden Gems were featured throughout the year.

Initiatives will be introduced to further catalyse growth, increase spend and further elevate the city's reputation as a top gastronomy destination by exploring new food industry innovations and culinary experiences. The gastronomy focus for 2022 is to continue to drive growth across Dubai's hospitality and F&B sector based on the four pillars of diversity, value for money, authenticity, and experiential.

FESTIVALS AND EVENTS

DUBAI SPEARHEADS GLOBAL MICE AND FESTIVALS REVIVAL

As the world's first city to safely stage in-person events in 2020, Dubai continued to demonstrate its leading role in the industry's global resurgence in 2021

As the world's first city to bring back large-scale in-person conferences and events in 2020, Dubai continued to enhance its reputation as a global MICE, festivals and events destination in 2021.

Thanks to the implementation of strict preventative health and safety measures, Dubai's events industry reopened in October 2020. The city earned major kudos from local and international event organisers, who acknowledged its tireless efforts to provide a safe platform for associations, businesses and organisations to resume face-to-face meetings and drive knowledge development in key sectors.

Dubai subsequently delivered an exciting programme of festivals and events that put the city on the map as one of the few in the world where international delegates could congregate safe in the knowledge that every precaution had been made to protect them from the threat posed by the pandemic.

BUSINESS EVENTS SECTOR GAINS MOMENTUM IN 2021

Dubai's business events industry continued to build on the momentum generated in 2020, hosting a busy calendar of MICE events over the course of 2021 and into 2022.

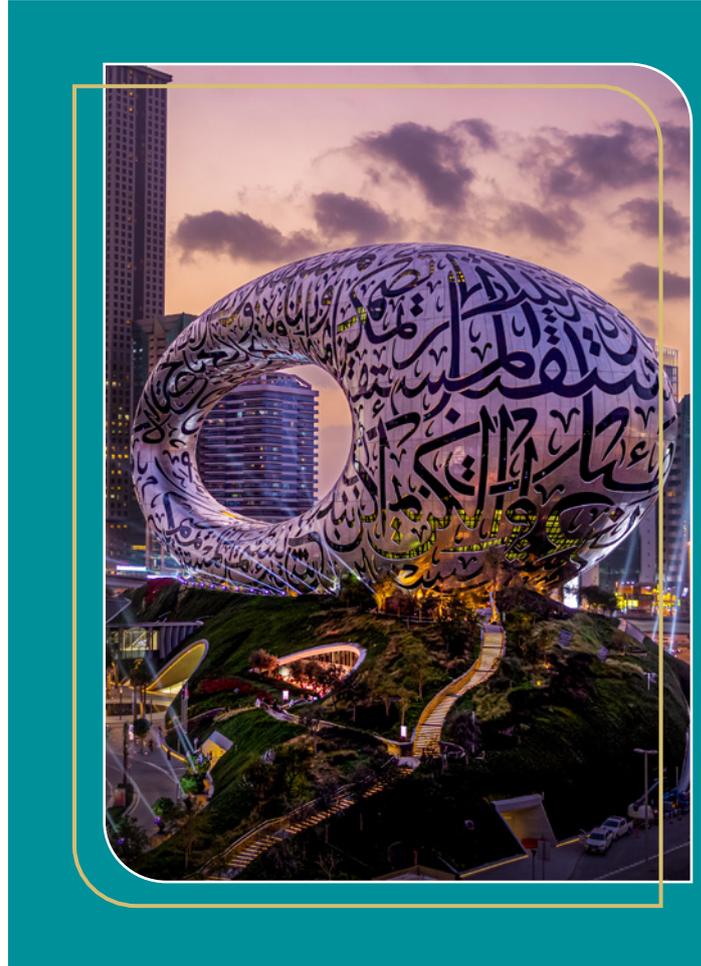
Major international congresses and conferences staged in Dubai last year included the Congress of the Société Internationale d'Urologie, Society of Petroleum Engineers Annual Technical Conference and Exhibition, International Astronautical Congress, World Chambers Congress, LPG Week, Gastech and Africa Oil Week.

Annual events including GITEX Technology Week and Arab Health – the region's largest annual ICT and healthcare industry conventions respectively – also made triumphant returns in 2021, with both events attracting similar attendance numbers to those staged prior to the pandemic.

Meanwhile, dozens of major incentive groups visited the city including AFC Life Science, Amway, Sunhope, Jeunesse and OMNILIFE.

The Dubai Exhibition Centre, situated within the Expo 2020 site, hosted a number of important conferences and events, including the Dubai Association Conference.

Throughout 2021, Dubai Business Events (DBE), the city's official convention bureau, regularly arranged face-to-face meetings and study tours with international events organisers to brief them about the city's world-class business events infrastructure and rapidly developing knowledge economy.



DUBAI STEPS IN TO HOST MAJOR EVENTS

Demonstrating Dubai's dynamic and capable approach to hosting major events, the emirate stepped in to host Africa Oil Week in November, after organisers deemed it a safer destination than original host city Cape Town, in light of the Omicron outbreak that was sweeping South Africa at the time.

In choosing Dubai, organisers praised the UAE's world-leading COVID-19 vaccination programme as well as the emirate's proven ability to safely stage world-class events throughout the pandemic.

It also highlighted Dubai's position as the leading financial centre in the Middle East, Africa and South Asia, which presented an opportunity for attendees to meet with new capital holders to further drive investment into Africa.

Meanwhile, Gastech, one of the world's largest exhibitions and conferences focused on gas, liquefied natural gas (LNG), and hydrogen, was also shifted to Dubai in September from its originally planned host city of Singapore.



DBE TARGETS FUTURE GROWTH

By collaborating with stakeholders across the public and private sectors, DBE secured a total of 120 major events through 2021 and beyond.

These events, which comprise of conferences, meetings and incentive travel programmes, brought more than 70,000 key opinion leaders, scientists, government officials and other experts to Dubai, placing the city at the heart of global conversations on the recovery of key sectors and professions, innovation and economic growth.

Among the major events secured for Dubai in 2021 was the 27th International Council of Museums (ICOM) General Conference, scheduled for 2025. DBE collaborated with the UAE's chapter of ICOM (ICOM-UAE), Dubai Culture and Arts Authority (Dubai Culture) and Dubai Municipality to secure the rights to host the event.

Other key events secured over the past year for the associations segment included the BIR World Recycling Convention & Exhibition (2022), Asian Congress in Paediatric Nephrology (2023) and the Congress of the International Society for Peritoneal Dialysis (2024).

Meanwhile, Dubai's pipeline of corporate MICE travel programmes continues to grow, with the addition of McDonald's Russia Convention, AIA Star Convention and Oriflame Anniversary Gold Conference, all scheduled to take place in 2022.

The additions to the pipeline come amid a growing focus on the business events sector in Dubai, underlined by the formation of the Department of Economy and Tourism (DET). One of the key priorities for the department is to capture 400 global economic events annually by 2025.

DSF AND DSS SPEARHEAD 2021 RETAIL REVIVAL

Dubai's annual shopping mega-events, the iconic world famous Dubai Shopping Festival (DSF) and Dubai Summer Surprises (DSS) returned in 2021, helping drive the city's tourism- and retail-led, post-pandemic economic recovery.

DSF and DSS are part of Dubai's annual Retail Calendar featuring an array of festivals and events dedicated to the ongoing growth of Dubai as a global retail destination. Other highlights of the Retail Calendar hosted by Dubai Festivals and Retail Establishment (DFRE), include the Dubai Food Festival, 3 day Super Sale and the Dubai Fitness Challenge.

The iconic Dubai Shopping Festival returned for its 27th edition on 15 December, offering residents and visitors a diverse line-up of exciting events, world-class entertainment, mega raffles and promotions.

Coinciding with Expo 2020 and the UAE's Golden Jubilee celebrations, the event further reinforced Dubai's reputation as a multi-faceted must-visit destination.

Organised by DFRE, the 2021 edition of Dubai's flagship festival featured live concerts, drone shows, firework displays, global brand collaborations, promotions and offers across a range of homegrown and global brands.

The return of the alternative retail concepts, Market OTB at Burj Park and the DSF Market at Al Seef also proved a hit among residents and visitors to the city.

CLOSING COMMENTS

Dubai continued to remain at the forefront of the world's leading travel destinations with the city's tourism ecosystem outperforming many of its established peers across key performance indices throughout 2021.

Internationally, the year marked a significant turning point for the tourism industry, with Dubai spearheading the post-pandemic recovery and setting the benchmark for how to ensure the safety of international visitors, providing them with the confidence to relax and enjoy the city's world-class attractions.

In the year of the UAE's Golden Jubilee, the opening of Expo 2020 Dubai and the resurgence of the city's MICE industry further enhanced Dubai's growing reputation as a major international events destination, while the continued growth of its leisure sector and the rise of UAE's domestic tourism contributed to the industry's overall stellar performance.

Looking ahead, Dubai's efforts to promote itself as the world's most liveable city will help diversify its tourism appeal in new markets worldwide, further boosting visitor arrivals and helping to drive growth across the sector. This positive outlook will give further confidence and encouragement to our stakeholders and partners, whose tireless efforts during the pandemic laid the platform for the tourism industry's success in 2021, ensuring Dubai is well positioned to further accelerate growth over the next 12 months and beyond.