

اقتصاد

للاقتصاد والسياحة
Economy and Tourism



DUBAI'S DEPARTMENT
OF ECONOMY AND TOURISM
ANNUAL VISITOR REPORT 2022



FOREWORD

“2033 will mark 200 years since the foundation of Dubai: the year in which Dubai will be the most important global business centre, and by then we would have completed the Dubai Economic Agenda 2033. We know our economic path over the next decade. The world makes way for those who know what they want.”

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

These inspiring words from His Highness Sheikh Mohammed bin Rashid Al Maktoum serve as a reminder of Dubai's vision and determination to be a catalysing force for global economic and tourism sector development.

Launched in January of this year, His Highness' Dubai Economic Agenda 'D33' seeks to double the size of the Dubai economy in the next 10 years, and ensure we firmly establish Dubai as one of the world's top 3 cities to invest, live, work and visit.

To achieve this, we will accelerate growth by investing in human development, skillsets and advanced technology and consolidate Dubai's global competitiveness, innovation and knowledge-based economy. Through this agenda, we will invest in enhancing the advantages gained from Dubai's strategic location and its advanced infrastructure to raise the city's status as a preferred destination for major international companies, entrepreneurial game changers, exceptional talent and global travelers.

Of course, a cornerstone of our growth has been, and will continue to be, tourism. Over the coming 20 years, we will be doubling the tourism infrastructure of the city, and this investment will not just serve as a global attractor of visitation, but also profoundly impact Dubai's ability to be one of the most desired cities for people to relocate to, and to grow in tandem with the city.

Looking back at 2022 and the tourism industry specifically, it offers us a unique perspective to reflect on and evaluate the sector in terms of what those 12 months delivered within broader macro-economic dynamics, the underlying drivers of our growing contribution to the city's GDP, and the sources of our sustainable competitiveness as we plan for the future.

Inspired by its visionary leadership, Dubai continues to make significant strides as a top global tourism hub with its world-class infrastructure, multitude of experiences and commitment to innovation and sustainability – all of which contribute to Dubai being for the second year in a row, the world's preferred and most recommended travel destination by TripAdvisor.

Dubai showcased strong growth in 2022 to adapt to the ever-evolving global tourism landscape,

welcoming 14.36 million overnight visitors - a remarkable 97% YoY growth that places Dubai firmly on track to become the world's most visited and revisited destination.

Dubai's diverse destination proposition and its readiness to cater to travellers of diverse budgetary thresholds and preferences also proved to be decisive factors. The launch of MICHELIN Guide Dubai last year also further elevated Dubai's status as a global gastronomy hub. And of course, it was Expo 2020 that played a stellar role in showcasing Dubai to the world for six successive months, leaving a lasting impression on millions of visitors and a priceless legacy for future generations. While Expo 2020 was a headline of 2022, new and existing iconic attractions and multitude of experiences continued to drive visitation growth.

Looking ahead, our Dubai Economic Agenda, D33, sets out an ambitious roadmap for the emirate's continued growth and development with a focus on sustainability and the continuous implementation of green energy solutions to improve the sustainability of the tourism sector and contribute to the broader clean energy and sustainable development targets that Dubai has set out to achieve. Indeed, in this landmark UAE 'Year of Sustainability' Dubai is proud to host COP28, the UN Climate Change Conference that will once again put Dubai in the global spotlight.

The extraordinary success achieved by Dubai in 2022 can also be attributed to the exceptional collaboration between the government and private sectors. This exceptional model of partnership has fostered a sense of unity within our industry, resulting in a cohesive approach towards promoting the city as an unparalleled tourist destination. We are truly grateful for the support extended by our stakeholders and partners, and with their continued cooperation Dubai looks forward to always offering something new and innovative for global travellers, further highlighting its position as a must-visit destination.

H.E. Helal Saeed AlMarri

Director General of the Dubai Department of Economy and Tourism

PERFORMANCE

DUBAI'S TOURISM PERFORMANCE LEADS THE WORLD IN 2022

The emirate continued to lead the global tourism industry's recovery from the COVID-19 pandemic, showcasing its credentials as one of the world's most popular destinations

Dubai once again demonstrated its leadership by spearheading the post-pandemic global tourism recovery in 2022, with the emirate welcoming 14.36 million overnight visitors in the calendar year.

The stellar performance represented an almost doubling of the 7.28 million arrivals reported in 2021 during the pandemic, and places Dubai firmly on track to meet or exceed the record 16.73 million arrivals in 2019.

Validating these statistics was Euromonitor's Top 100 City Destinations Index that established Dubai as the world's most popular destination in terms of international visitor arrivals and second most-popular destination overall in 2022. It also coincided with the city being named the World's Number 1 tourism destination in the 2022 and 2023 TripAdvisor Travellers' Choice Awards.

The TripAdvisor honour, which was based on hundreds of thousands of independent traveller reviews, was particularly notable given that Dubai is just the second destination in history to receive the accolade twice.

2022 marked a significant milestone in the global travel industry's post-pandemic recovery, and Dubai's world-leading performance during this period has it well-placed to drive GDP impact through 2023 and beyond.

KEY SOURCE MARKETS

TRADITIONAL SOURCE MARKETS DRIVE GROWTH IN VISITOR ARRIVALS

The impressive performance of Dubai's top four visitor markets spearheaded the emirate's year-on-year (YoY) rise in international arrivals in 2022, with India, Oman, the Kingdom of Saudi Arabia (KSA) and the United Kingdom all posting substantial triple-digit percentage increases over 2021.

India once again proved Dubai's most-important source market, accounting for 1.842 million arrivals in 2022, up 102 per cent YoY and just shy of the 1.97 million arrivals reported in 2019. Second-placed Oman contributed 1.31 million visitors, up a massive 369 per cent YoY and eclipsing its 2019 performance

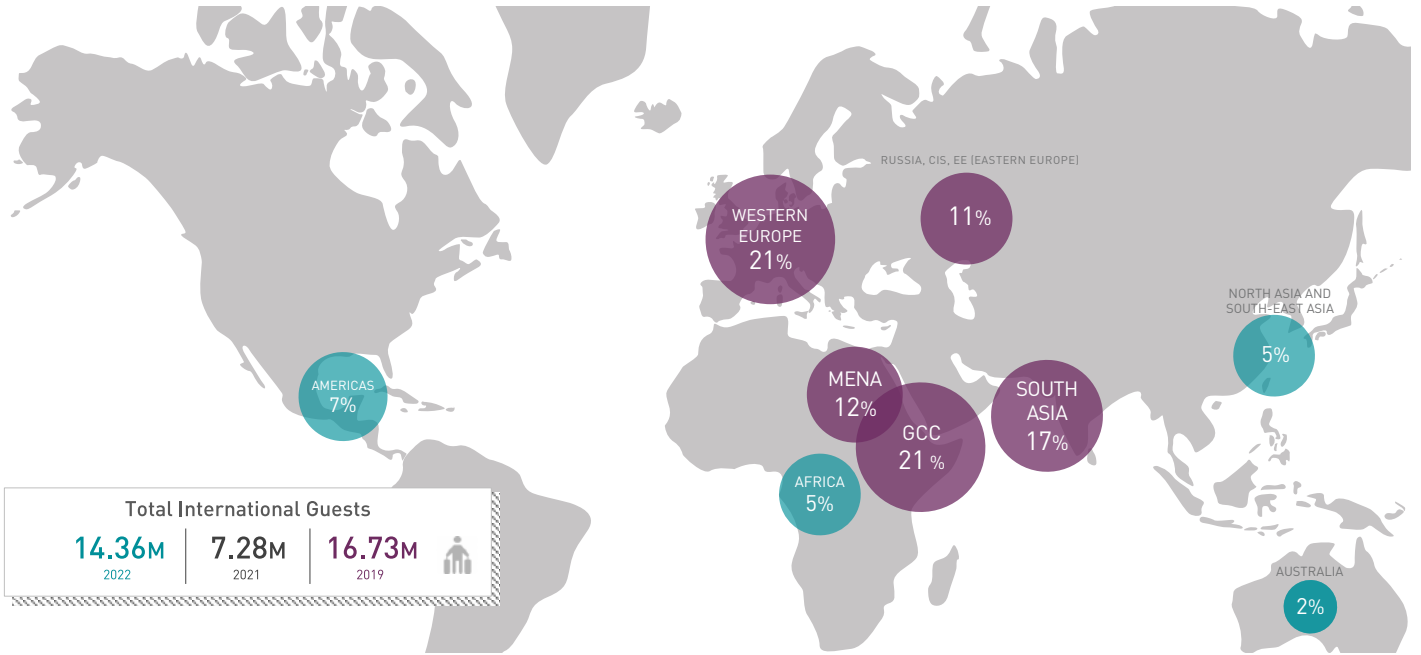


by 27 per cent, while third-ranked KSA saw arrivals rise 147 per cent YoY to 1.216 million. Meanwhile, the UK accounted for 1.043 million visitors (up 149 per cent YoY), ahead of fifth-placed Russia with 758,000 visitors, representing a rise of 70 per cent YoY.

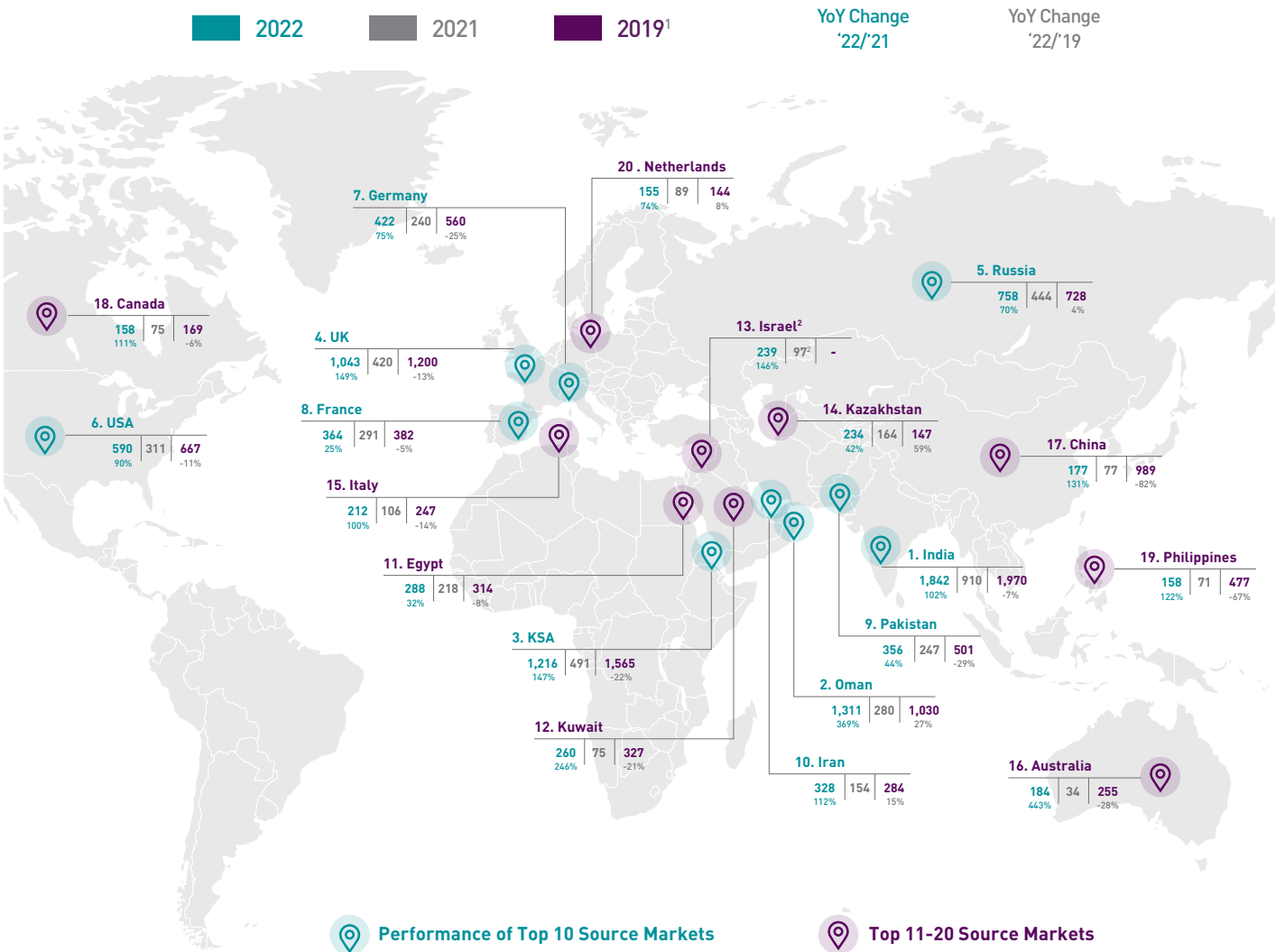
Sixth-placed United States reported a 90 per cent YoY increase in visitor arrivals to 590,000, followed by Germany with 422,000 arrivals (+75 per cent YoY), France (364,000 at +25 per cent YoY) and Pakistan (356,000 at +44 per cent YoY). Rounding out the top 10 source markets for 2022 was Iran with 328,000 visitors, which was another star performer, recording a triple-digit (+112 per cent YoY) increase in arrivals.

In terms of regions, Western Europe and the GCC topped the charts, with both territories accounting for 21 per cent each of the 14.36 million international arrivals. South Asia ranked third with 17 per cent of the total, followed by the Middle East and North Africa (MENA) at 12 per cent; Russia, the CIS and Eastern Europe at 11 per cent; the Americas at seven per cent; and Africa at five per cent. Meanwhile, North Asia and SE Asia accounted for five per cent and Australasia two per cent of the total, partly reflecting the continued restrictions that affected outbound travel in these markets throughout 2022.

SOURCE OF VISITORS BY REGION [% Jan - Dec 2022]



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



Notes:
 (1) Pre-pandemic year for comparison
 (2) Dubai started welcoming visitors from Israel in 2020
 (3) The difference in totals is due to rounding

ACCOMMODATION

DUBAI HOTELIERS SHOWCASE STRENGTH OF POST-PANDEMIC RECOVERY

Dubai's hotel industry went from strength to strength in 2022, supported not only by the impressive rise in international visitor arrivals but also the thriving domestic tourism segment, which grew significantly during the pandemic.

Showcasing the industry's success was the year-on-year (YoY) rise in average occupancies from 67 per cent in 2021 to 73 per cent – one of the highest occupancy rates in the world, with room supply being substantially greater than most peers.

The result is particularly impressive when compared with the 75 per cent occupancy rate recorded in 2019



but with a 16 per cent increase in room supply from the pre-pandemic baseline.

Dubai's hotel inventory stood at 146,496 rooms across 804 hotels by the end of 2022, compared to 126,120 rooms across 741 establishments three years prior, an increase of 16 per cent and nine per cent respectively. This trend shows no sign of abating, with the city's guestroom inventory on track to eclipse 152,000 by 2024, an increase that highlights the city's enduring appeal as one of the world's great hotel investment hubs.

Further consolidating Dubai's international reputation was the fact the city's hoteliers clearly outperformed the previous 2019 benchmark results across all other key performance indices in 2022. Occupied room nights reached a record high of 37.43 million last year, up 19 per cent compared to 2021 (31.47 million) and 17 per cent compared with 2019.

The city's average daily rate (ADR) of AED536 was up 19 per cent YoY and 29 per cent compared with 2019, while revenue per available room (RevPAR) increased 30 per cent compared to 2021 and 25 per cent in 2019 to reach AED391.

Highlighting the continued success of Dubai's efforts to reach new visitor source markets including families and groups was the fact its fast-growing budget accommodation sector, comprising of 1-3-star hotels and standard hotel apartments, attracted the highest occupancy rates among all segments at 74 per cent and 79 per cent respectively.

This was reflected by the popularity of budget traveller hotspots Al Barsha and Bur Dubai, which reported average occupancy rates of 77 per cent (+6 per cent YoY), and Deira, with 75 per cent (+11 per cent YoY).

This performance did not detract from the ongoing success of the city's 5-star luxury accommodation sector, which accounted for 34 per cent of total guestroom inventory and reported a 70 per cent average occupancy rate.

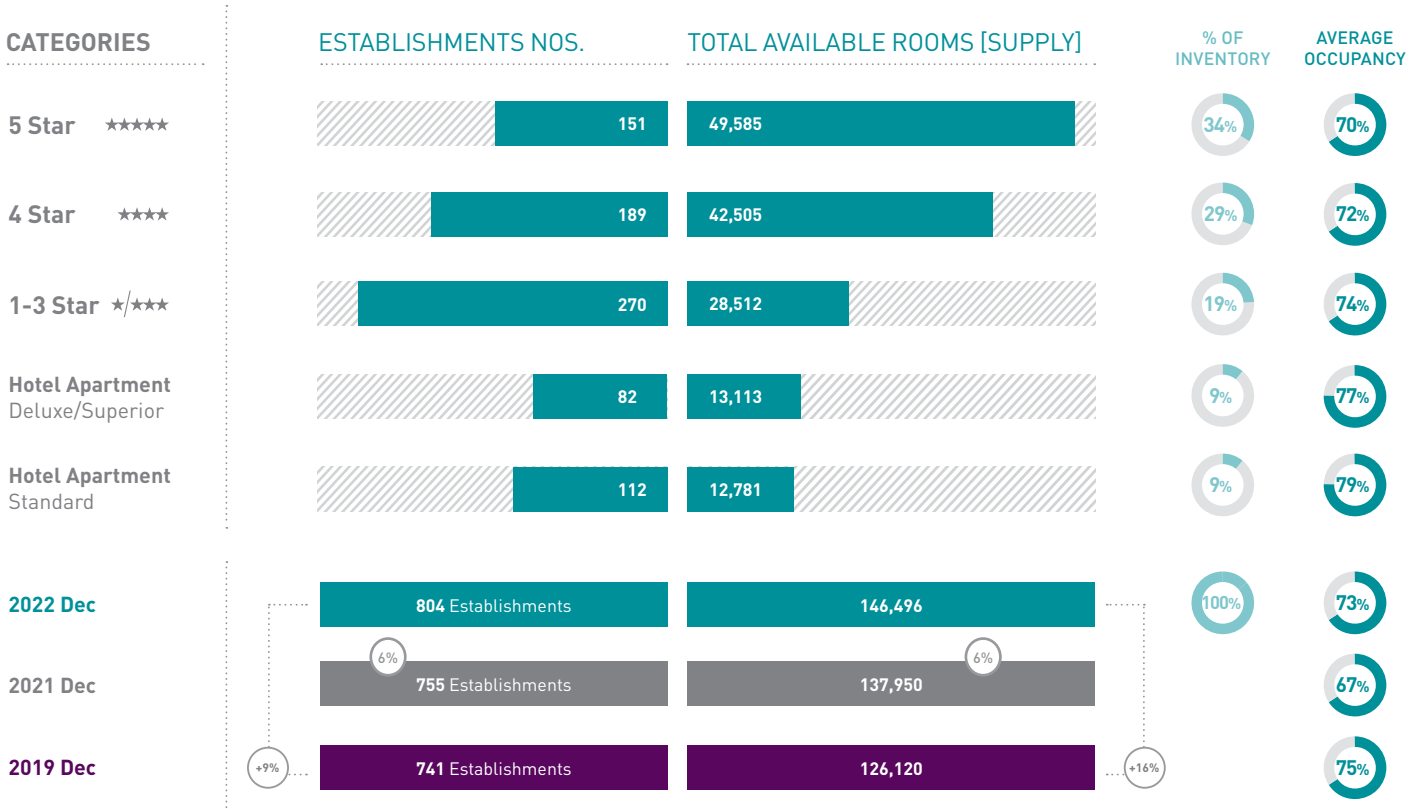
In this segment, traditional hotspots Palm Jumeirah (74 per cent; +8 per cent YoY) and Dubai Marina (77 per cent; +9 per cent YoY) led the market's success in terms of occupancy rates, while other strong performers included Downtown Dubai (68 per cent; +15 per cent YoY) and DWTC (68 per cent; +12 per cent YoY).

Domestic tourism, which played a pivotal role in sustaining Dubai's hotel and hospitality sectors throughout the COVID-19 pandemic, again contributed to the industry's stellar success in 2022.

UAE residents accounted for 9.5 million occupied room nights in 2022, or 25 per cent of the total figure, while their average length of stay was 2.8 nights – up from just 1.9 nights in 2019 – reflecting the growing popularity of short-break domestic holiday packages in the city. Dubai residents also accounted for the overwhelming majority of hotel guestroom bookings in 2022 at 79 per cent of the total figure, followed by Abu Dhabi residents at 14 per cent.

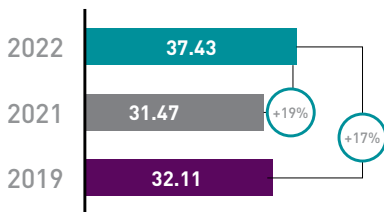
HOTEL INVENTORY BY CATEGORY AND PERFORMANCE KPIs

2022 2021 2019



DUBAI VISITORS DRIVE ECONOMIC GROWTH IN HOTELS (YOY Jan – Dec)

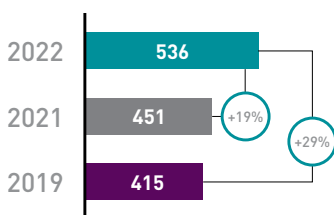
OCCUPIED ROOM NIGHTS Million



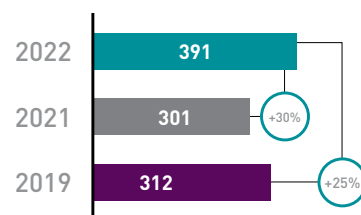
GUESTS' LENGTH OF STAY Nights



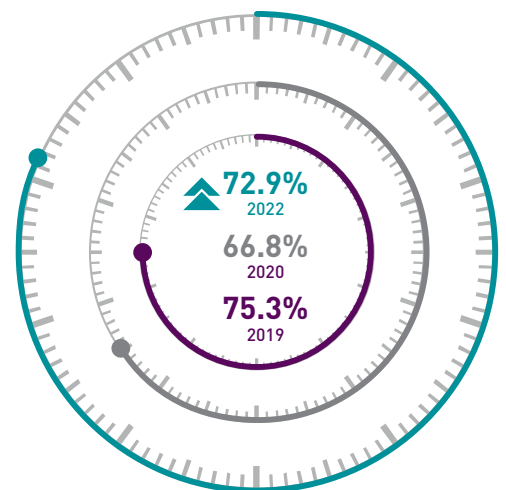
AVERAGE DAILY RATE AED



REV PER AVAIL. ROOM AED



AVERAGE OCCUPANCY



Notes:

- (1) Pre-pandemic year for comparison
- (2) Average Occupancy in Jan-Dec '22 only (-2.4) ppt less than pre-pandemic level despite the +16% increase in room inventory
- (3) Nights and revenue figures are reflective of reported hotel data including residents and hoppers
- (4) Establishment Nos and Total Available Rooms are reflective as the actual numbers end of Dec 2022
- (5) Occupancy is reflective of the YTD status and hence not directly corresponding to the monthly capacity (rooms available) depicted in the data alongside

VISITOR TRENDS

THE RETURN OF LEISURE TRAVEL DRIVES DUBAI'S TOURISM GROWTH

Dubai's reputation as one of the world's leading family-friendly leisure tourism destinations played a key role in driving the growth in international visitor arrivals in 2022.

According to the 2022 Dubai International Visitor Survey (DIVS), 79 per cent of international visitors who travelled to the emirate did so for leisure, up from 71 per cent in 2021, while the proportion of families and couples also increased by six percentage points year on year (YoY) and five percentage points compared to 2019 to 79 per cent.

Visitors on average spent 7.8 days in Dubai, which was consistent with the 8-day average reported in 2019. The proportion of repeat visitors to the city also rose to 22 per cent in 2022, up from just nine per cent in 2021.

Dubai's appeal as a family friendly destination continues to grow, as evidenced by the fact the average party size of group arrivals increased from 2.3 in 2021 to 2.6 in 2022.

The proportion of visitors travelling to Dubai to spend time with family and friends was consistent with 2021 at 15 per cent, while the relative proportion of travellers who said their sole purpose for visiting Dubai was business fell by six per cent YoY in 2022. This can mainly be attributed to the trend toward 'bleisure travel' and the fact that many business travellers to Dubai now combine work and leisure, taking advantage of the city's reputation as one of the world's great tourism destinations to extend their stay for some rest and relaxation.

WORLD-FAMOUS ATTRACTIONS LURE INTERNATIONAL GUESTS

Dubai's collection of iconic tourist attractions once again proved their worth in driving international visitation in 2022, with traditional favourites Dubai Mall and Dubai Fountain welcoming 99 per cent (+1 per cent (YoY)) and 86 per cent (+5 per cent YoY) of all international visitors respectively.

Dubai's reputation as one of the world's leading beach holiday destinations was highlighted by the rising appeal of its beachside and marine attractions, which welcomed 91 per cent of all visitors to the emirate, up from 88 per cent in 2021. Palm Jumeirah also demonstrated its rising popularity as a global tourism destination in its own right, thanks to the opening of new and exciting attractions such as the Palm Fountain, accounting for the largest YoY rise in

visitation (+16 per cent YoY) among all attractions to account for 54 per cent of all visitors in 2022.

Burj Khalifa proved its enduring appeal as a global architectural icon, welcoming 37 per cent of all visitors to the city, up 13 per cent YoY, while nearby Dubai Water Canal also recorded a five per cent YoY increase in visitation to 22 per cent in 2022.

Dubai's rising status as the region's leading cultural hub, enhanced by the opening of major attractions in 2022 including the ground-breaking Museum of the Future and the AED1 billion Mohammed Bin Rashid Library, was highlighted by the growing popularity of its Heritage & Cultural Districts, which together attracted 65 per cent of all visitors to the emirate, up from 59 per cent in 2021.

The impressive growth in leisure tourism in the wake of the pandemic also provided a solid boost to one of the emirate's most enduring attractions, the desert safari. Forty-six per cent of all visitors experienced the adrenalin-fuelled rush of an offroad desert adventure in 2022, up from 34 per cent in 2021.

VISITOR SATISFACTION

VISITORS 'OVERWHELMINGLY SATISFIED' WITH DUBAI'S TOURISM OFFERING

Dubai's status as one of the world's most popular destinations was reflected in the findings of the 2022 Dubai International Visitor Survey (DIVS), with 100 per cent of visitors to Dubai declaring they were either happy or extremely happy with their experience in the city. Meanwhile, the survey's net satisfaction score of 78.2 per cent marked a 9.5 per cent rise on the 68.7 per cent mark registered in 2019, prior to the onset of the COVID-19 pandemic.

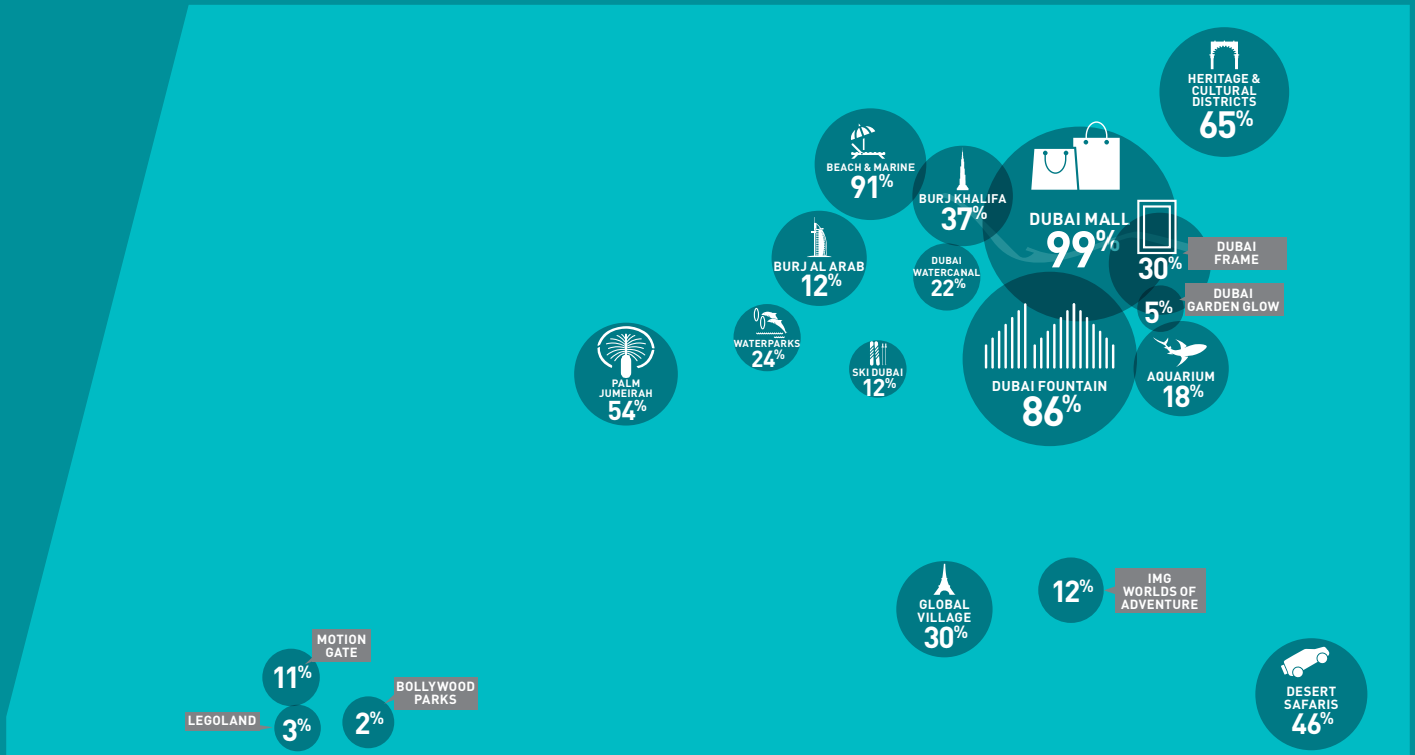
Highlighting Dubai's impressive reputation as one of the world's greatest tourism destinations was the fact that 100 per cent of surveyed visitors said they were promoters of the city, while 80.8 per cent described themselves as active advocates.

Overall, the survey's net promoter score rose to 80.8 per cent in 2022, up from 76.9 per cent in 2019, reflecting the growing strength of Dubai's international brand reputation.

Online perceptions of Dubai also reached new highs in 2022, according to the Dubai Digital Reputation survey, which aggregates millions of online reviews from visitors rating their levels of satisfaction with the services they receive in the city's hotels and restaurants.

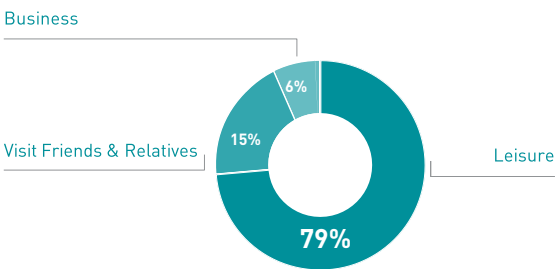
The survey revealed that Dubai's restaurants recorded an average score of 4.4 out of five based on independent guest reviews, while hotels scored 9.1 out of 10 based on online ratings and sentiment analysis.

% OF TRAVELLERS VISITING DUBAI'S KEY ATTRACTIONS

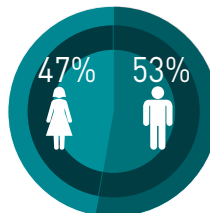


VISITOR TRENDS

PURPOSE OF VISIT



GENDER



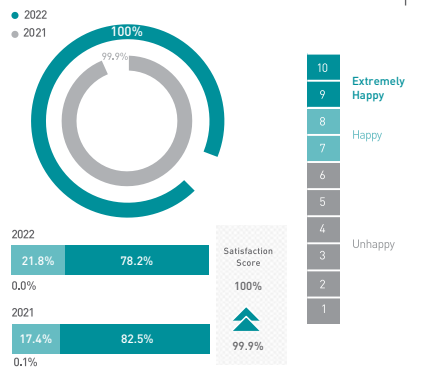
AVERAGE PARTY SIZE



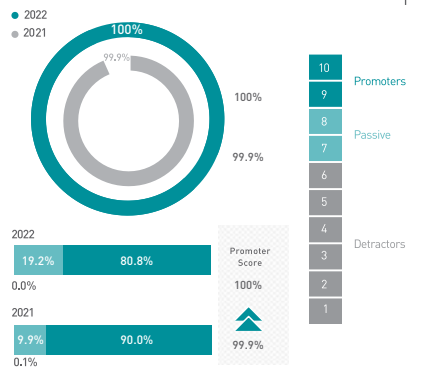
LENGTH OF STAY



OVERALL SATISFACTION



ADVOCACY



Source: Dubai International Visitor Survey 2022

ECOSYSTEM

GASTRONOMY

DUBAI: CELEBRATING THE WORLD'S FASTEST-GROWING GASTRONOMY DESTINATION

Supported by DET's landmark 'Gastronomy Always On' campaign, Dubai's F&B sector is attracting much-deserved global attention

Dubai leveraged its status as one of the world's top culinary destinations in 2022, building on its high-profile 'Gastronomy Always On' (GAON) campaign and establishing a dedicated team within Dubai's Department of Economy and Tourism (DET) that is working with the city's F&B sector to develop, support and promote key initiatives year-round.

Dubai is the Middle East and North Africa's F&B capital, home to more than 13,000 F&B outlets, from homegrown eateries and neighbourhood cafes to Michelin-starred fine dining restaurants.

It is the region's only city to boast its own Michelin Guide, while the emirate features heavily in the annual Gault&Millau guide dedicated to the UAE's burgeoning F&B scene.

Dubai's stature as a global gastronomy destination is highlighted by the number of international accolades it has received in recent years. In 2022, it was declared the world's fourth-best destination for food lovers in TripAdvisor's Travellers' Choice Awards, which are judged by millions of TripAdvisor users worldwide.

Dubai also 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.

DET's GAON campaign supports the F&B industry with a year-round calendar of culinary events and initiatives, which reflect the initiative's four main pillars of diversity, authenticity, value for money and experiential dining.

In addition to the hugely popular Dubai Food Festival (DFF), which includes the Dubai Restaurant Week, successful initiatives launched in 2022 included Foodie Experiences, Made in Dubai and Hidden Gems.

DFF 2022, which was staged in May and coincided with Eid Al Fitr, featured a huge range of promotions and initiatives, from exclusive Chef's Table experiences to dining discounts, citywide competitions and foodie adventures.

In partnership with 40 of the city's best restaurants, Dubai Restaurant Week provided diners the chance to enjoy three-course dinner menus at up to 50 per cent off typical rates.

Dubai's collection of 16 restaurants shortlisted in the MENA 50 Best Collection also offered curated Dubai Restaurant Week menus, while a select few including Japanese fine dining outlet Reif Kushiyaki provided exclusive Chefs Table experiences as part of the initiative.

The Foodie Experiences promotion made a welcome return to the 2022 festival, offering diners one-of-a-kind food adventures across Dubai, including chef tables, masterclasses, culinary collaborations, and unique experiential dining concepts.

DET is working in conjunction with F&B industry stakeholders, including suppliers and restaurateurs, food tour operators, and other F&B SMEs, to capitalise on the momentum generated throughout 2022.

In December, DET hosted the third Dubai Gastronomy Forum, which was attended by 150 gastronomy industry culinary stakeholders, hotel groups, destinations, key industry specialists and F&B partners.

During the forum, DET shared details with industry stakeholders regarding plans for 2023, including information regarding the 10th anniversary edition of DFF. Taking place from 21 April - 7 May, DFF 2023 will showcase the depth, diversity and creativity of Dubai's gastronomy offering through an expanded programme of events and activities, celebrating home-grown concepts, Emirati and international cuisine, as well as global trends and the chefs, culinary pioneers, gourmet thought leaders and tastemakers that continue to reflect and inspire Dubai.



SPORTING EVENTS

DUBAI EXPERIENCES FOOTBALL FEVER

Football fans descended on Dubai during the 2022 FIFA World Cup, with the city just one of six worldwide to host an official FIFA fan zone

Dubai's status as one of the world's top destinations for sporting events continued to grow in 2022.

In addition to globally recognised annual events including Emirates Airline Dubai 7s Rugby tournament, Dubai World Cup horse race, Dubai Desert Classic golf tournament and Dubai Duty Free Tennis Championship, Dubai transformed itself into a giant fanzone during the 2022 FIFA World Cup.

With thousands of international football fans basing themselves in Dubai for the duration of the tournament, outdoor pop-up venues popped up across the city showing games live and a range of associated events.

Headlining the spectacle was the BudX FIFA Fan Festival site in Dubai Harbour, which was just one of six official World Cup fan sites established worldwide.

The 10,000-capacity dedicated fan zone proved a lively and popular hangout for football fans who gathered to watch live matches and witness performances from the likes of famed Brazilian DJ Ludmilla, among other highlights.

In the lead up to the World Cup, Dubai's official events listing website, Dubai Calendar, launched a dedicated website showcasing the dozens of indoor and outdoor venues that were hosting World Cup-related events during the tournament.

SkyDive Dubai hosted its own pop-up venue named Zero Gravity. The 4,000-capacity waterfront venue also featured various DJ performances and food outlets.

Closer to Downtown Dubai was The Football Park at DIFC. This upscale venue featured an open-air viewing deck providing impressive views of assorted massive screens showing live matches. Guests enjoyed a broad selection of dining options from more than 300 pop-up outlets including some of DIFC's finest restaurants.

Football fans were also treated to live football action in December in the form of the Dubai Super Cup, the annual tournament featuring some of Europe's most famous clubs. The 2022 tournament, which featured English Premier League clubs Liverpool FC and Arsenal, Italy's AC Milan and France's Lyon (Olympique Lyonnais), took place from 8th-16th December at the Al Maktoum Stadium.



RETAIL EVENTS

DUBAI MOVES TO CAPITALISE ON RETAIL EVENTS SUCCESS

Dubai's reputation as a global shopping destination is set to grow following the launch of a dedicated Retail Calendar

Looking to capitalise on the immense success of Dubai's pioneering annual retail events, Dubai Shopping Festival (DSF) and Dubai Summer Surprises (DSS), Dubai Festivals and Retail Establishment (DFRE) introduced a dedicated Retail Calendar for 2023.

The calendar showcases an exciting line-up of 18 citywide events and activities designed to make Dubai one of the best places in the world to live, work and visit.

Anchored by DSF and DSS, the events line-up incorporates the Dubai Fashion Season Spring/Summer and Fall/Winter Collections, Chinese New Year Celebrations, Ramadan and Eid in Dubai, Dubai Food Festival, and Dubai Fitness Challenge.

Other popular events include October's Dubai Home Festival, Diwali in Dubai in November and UAE National Day in December.

Providing a year-round line-up of exciting retail and lifestyle opportunities for Dubai's residents, the calendar is tailored to the city's key inbound business and leisure visitor markets, enabling DFRE to capitalise on the increased footfall anticipated in Dubai throughout 2023.



DUBAI SHOPPING FESTIVAL 2022 EXCEEDS ALL EXPECTATIONS

Dubai Shopping Festival (DSF), which marked its 28th year in 2022, exceeded all expectations, with the latest instalment attracting hundreds of thousands of visitors to the city and providing a major boost to the city's retail and live events economy.

The 46-day festival, which ran from 15 December 2022 to 29 January 2023, offered residents and visitors exceptional experiences at malls and destinations across Dubai, including live music performances, art installations, shopping deals and prize draws.

DSF 2022 also provided many exciting opportunities for small businesses, entrepreneurs and those working in the arts and culture industries. Almost 700 performing artists, entertainers and musicians performed as part of DSF events and activations, with more than 174,000 people attended DSF concerts and events.

A total of 122 UAE-based SMEs had the chance to showcase their wares and reach new customers thanks to vendor opportunities at DSF pop-up markets, including Etisalat MOTB at Dubai Design District (d3), Al Quoz Arts Festival, and DSF Market at Al Seef. More than 1,000 retail brands participated in the festival.

DSF has long been known for its mega raffles and prizes, and during the 2022 edition, 6,534 lucky winners took home prizes worth a combined AED 53,348,641. Highlights included kilos of gold, a brand-new Nissan Patrol XE and an apartment in Downtown Dubai.

DSF 2022 also introduced a number of innovations, including a new attraction in the heart of Dubai Design District (d3), the city's global hub of art, design, and creativity. Known as Sky Castle, the art installation proved a major highlight of the second edition of Dubai Lights and became the new home for the much-loved Etisalat MOTB, which attracted its highest-ever attendance with 136,000 visitors across 11 days.

MICE

DUBAI BOOSTS ITS REPUTATION AS ONE OF THE WORLD'S FASTEST-GROWING MICE DESTINATIONS

The emirate's events planners leveraged the global success of Expo 2020 Dubai to secure almost double the number of international event bid wins in 2022

Dubai's MICE industry marked another exceptional year of growth in 2022, with the city securing 232 bids for business events, almost twice as many as 2021.

Importantly, the wins included 57 association conferences, the most Dubai has won in a single calendar year to date, according to Dubai Business Events (DBE), the city's official convention bureau.

Set to be hosted in the coming years, these events will bring an additional 135,000 thought-leaders to the city – from scientists and researchers to business executives and investment professionals – a segment of knowledge workers and new economy professionals that will undoubtedly deliver strong economic gains to Dubai.

DBE collaborated with a range of stakeholders to secure the event bids including Al Safeer Congress Ambassadors; the region's largest venue operator and event organiser, Dubai World Trade Centre; and the world's leading international airline, Emirates; as well as hotels and professional congress organisers (PCOs) from across the city.

With a 95 per cent YoY growth in the number of successful bids and a 92 per cent increase in the number of delegates added to the pipeline, the city's MICE sector is set to prove a critical facilitator for Dubai's recently announced 2033 (D33) strategy, which is designed to boost its reputation as a knowledge economy and global IP hub.

Securing these landmark events, especially international

association conferences, will play a vital role in further propelling innovation, professional development and intellectual capital exchange across industries that are leading the way on global transformation – and with Dubai being recognised as the connector for ideas and actions.

The major association events captured in 2022 included the International Federation of Clinical Chemistry and Laboratory Medicine WorldLab Congress 2024, International Congress of Endocrinology 2024, World Sports Medicine Congress 2024, World Congress of the International Society of Radiographers and Radiological Technologies 2026, and International Symposium on Dental Hygiene 2028.

Meanwhile, major MICE programmes secured by Dubai in 2022 include the IBM India and Europe Incentives 2023, Terpel Convention 2023, Envista EMEA Summit 2023 and Mary Kay Mexico Incentive 2024.

To build on the 2022 successes, DBE remains committed to keeping Dubai top of mind among meeting planners and association executives through an intense, year-round calendar of global sales activities, including study missions, roadshows and participation in major trade shows, such as IBTM World and IMEX.

During 2023, DBE will also join forces with industry stakeholders to host meeting planners in Dubai to experience the city's business events and tourism infrastructure and its close geographical vicinity to talent bases across the Indian Subcontinent, Africa, CIS and Europe.

Dubai World Trade Centre (DWTC) –one of the MICE sector's most important stakeholders – reported a similarly impressive performance in 2022, hosting 244 MICE, business and consumer events, which together attracted 1.98 million delegates, up 29 per cent YoY.

Exhibitions and Conferences, which accounted for more than one-third of events staged at DWTC in 2022, welcomed 1.18 million attendees, of which 38 per cent were from international markets, reflecting Dubai's position as the destination of choice for business connectivity among two-thirds of the global population.

More than 37,000 companies exhibited at DWTC last year, marking a 50 per cent increase compared to 2021, with 72 per cent of this total number hailing from international markets.

DWTC's homegrown exhibitions and events, which includes flagship events GITEX Global and Gulfood, attracted 337,000 visitors, registering 20 per cent annual growth, while the combined portfolio of all business shows attracted 12,000 exhibiting companies, an impressive increase of 35 per cent.

GITEX Global, the world's largest tech show, achieved record highs, delivering over 170,000 attendees, 40 per cent of whom were from international markets. According to official data, the event generated AED2.6 billion worth of total economic output, with 57 per cent retained within the local economy – highlighting the GDP impact this industry generates for the emirate.





AVIATION

THE WORLD'S TOP AVIATION HUB MARKS ANOTHER YEAR OF SUCCESS

Dubai enhanced its standing as the most influential aviation hub on the planet in 2022, with passenger growth rising at the fastest rate since 2019

Dubai International (DXB), the world's busiest airport by international passenger traffic, registered another impressive performance in 2022, with annual passenger numbers reaching 66 million, up 127 per cent year on year (YoY).

DXB's growth outpaced its initial annual forecast yet again in the final months of the year following an exceptionally strong fourth quarter, a period in which the airport welcomed 19,729,155 passengers, up 67 per cent compared to the fourth quarter of 2021. It was the busiest quarter since 2019.

December also proved the busiest month of the year with 7.1 million passengers, the first time since January 2020 that DXB's monthly traffic hit the 7 million mark.

India retained its position as the top destination country for DXB by passenger volumes, with a total traffic of 9.8 million passengers, followed by Saudi Arabia with 4.9 million passengers, and the United Kingdom with 4.6 million passengers.

Other destination countries of note include Pakistan (3.7 million passengers) the United States (3 million), and Russia (1.9 million), which along with Turkey (1.6 million) has recorded more than 100 per cent recovery in passenger volumes compared to 2019 levels.

DXB's top destination cities during 2022 were London with 3 million passengers, Riyadh (2 million), Mumbai (1.9 million), and Jeddah and New Delhi, both with 1.7 million passengers.

DXB is currently connected to 229 destinations across 99 countries through more than 88 international carriers.

Total flight movements at DXB totalled 96,701 during the fourth quarter bringing the annual flight movements to 343,339, a year-on-year growth of 47 per cent. The average number of passengers per flight reached 204, up 33 per cent year-on-year.

With DXB forecast to welcome 78 million passengers in 2023, and Dubai hosting major international events including the Dubai Airshow and COP28, the city looks set to further grow its reputation as the most ambitious and influential aviation hub on the planet this year.

GLOBAL PRAISE

DUBAI: 'THE WORLD'S NUMBER ONE DESTINATION'

Dubai's international profile continued to grow in 2022, with TripAdvisor naming the city its top global destination for the second year in a row

Dubai was crowned the No.1 global destination in TripAdvisor's Travellers' Choice Awards for a second successive year in 2022, with the recognition helping to consolidate its position as the world's favourite tourist destination.

Dubai's success in the highly respected annual awards programme, which is based on feedback and reviews from TripAdvisor's 1-million-plus membership base, is testament to the city's efforts to expand its appeal to new source markets and visitor demographics, while

continually enhancing its tourism offering.

Dubai is just the second city worldwide to win the award in consecutive years.

The milestone underscores efforts to establish Dubai as the world's most visited and liveable city through landmark initiatives such as the Dubai 2033 Economic Agenda (D33). The strategy also aims to enhance Dubai's status as a global hub for connectivity, commerce and investment.

The recognition is just one in a series of international accolades bestowed on Dubai in recent years, demonstrating the city's enduring appeal as a multifaceted destination.

In 2022, TripAdvisor also declared Dubai the world's fourth-best destination for food lovers. Several of Dubai's restaurants, chefs and gourmet experiences were also recognised in the inaugural edition of the Middle East & North Africa's 50 Best Restaurants Awards 2022.



دبي

#1

#1

Popular Destination in the World

Burj Al Arab
Jumeirah

A DESTINATION TO VISIT AND CALL HOME

D33 AGENDA

D33: DUBAI OUTLINES ITS PIONEERING VISION FOR THE FUTURE

The groundbreaking Dubai 2033 Economic Agenda (D33) aims to massively grow Dubai's economy while helping to establish it as one of the world's most liveable cities

The Dubai 2033 Economic Agenda (D33) represents one of the most ambitious socioeconomic roadmaps ever launched by a global city.

The comprehensive strategy, which aims to double the size of Dubai's economy over the next decade and consolidate its position among the top three cities on the planet, includes 100 transformative projects that will reshape the way people live, work and play in the emirate.

The headline statistics are staggering and include economic targets of AED32 trillion over the next 10 years, doubling the city's foreign trade to reach AED25.6 trillion and adding 400 cities as key trading partners over the next decade.

Speaking at the launch of the initiative in January 2023, His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, said: "2033 will mark 200 years since the foundation of Dubai: the year in which Dubai will be the most important global business centre, and by then we would have completed the D33 Agenda. We know our economic path over the next decade. The world makes way for those who know what they want. D33 plans for Dubai to rank among the top four global financial centres with an increase in FDI to over AED650 billion over the next decade and an annual AED100 billion contribution from digital transformation."

Growth acceleration plans include strategic investments in human development, skillsets and advanced technology and consolidating Dubai's global competitiveness by growing its knowledge-based economy.

It also positions tourism and Dubai's fast-growing reputation as one of the world's most liveable cities as core priorities. A stated goal of the Agenda is to make Dubai one of the top three international destinations



for tourism and business by providing a globally competitive environment for business sustainability.

In addition to enhancing the city's appeal as a global business hub that offers benchmark standards of living, D33 aims to provide the highest levels of security and safety for Dubai's citizens and residents.

Moreover, the Agenda aims to integrate new generations of Emiratis into the private sector, making Dubai a hub for skilled new economy professionals – and consequently a natural magnet for global conglomerates and innovative startups.

It also supports the launch of Sandbox Dubai, which aims to make Dubai a major hub for incubating business innovation by enabling the testing and marketing of new products and technologies.

Furthermore, the Dubai Traders Project (DT33) will empower a new generation of Dubai traders in various vital growth sectors, driving growth in the city's vibrant trading hub.

Aligned with the emirate's 2040 Urban Master Plan, which provides a sustainable development roadmap for the city over the next 20 years, the city's plans expect to evolve sustainably to house a projected 5.8 million people within the next 20 years, with parkland and recreational spaces doubling to cover roughly 60 per cent of the urban environment.

Green corridors linking the city's main urban areas will enable residents to commute using advanced bike lanes and mass transit services.

In terms of leisure options, the Plan calls for an increase in the total space dedicated to hotels and tourism activities by 134 per cent compared with today, while the area used for commercial activities will increase to 168 sq km – both being complemented by a 400 per cent increase in the length of public beaches in the emirate by 2040.

Across these highlights, the plan clearly prioritises the agenda to cement Dubai's reputation as a leading business and tourism investment destination.

DIGITAL ECONOMY & BEYOND

HOW DUBAI IS LEADING THE TRANSFORMATION OF A BORDERLESS VIRTUAL ASSET ECONOMY

Reflecting its reputation as one of the world's most advanced economies, Dubai is quickly establishing itself as a global hub for Virtual Assets, underpinning future economy drivers across Web3, AI, Blockchain and Metaverse.

In March 2022, the city established the world's first and only regulatory regime for governing the Virtual Assets industry – Dubai Virtual Assets Regulatory Authority (VARA). In July of that year, the emirate launched the Dubai Metaverse Strategy, which aims to rapidly establish Dubai as one of the world's top 10 metaverse economies.

Dubai is already home to more than 1,000 companies in the fields of blockchain and metaverse. The strategy will support the emirate's plan to create more than 40,000 virtual jobs by 2030, with the expansion of the sector adding US\$4 billion to the emirate's economy in the next five years. It also supports the UAE government's vision of increasing the number of blockchain companies operating in the Emirates by five times the present figure.

In line with its strategy to attract the world's best digital talent to Dubai, government authorities have pledged to provide 100,000 Golden Residency Visas under the National Programme for Coders.

Key growth sectors covered by the plan include

extended reality (which blends the physical and virtual worlds), augmented reality (AR), virtual reality (VR), mixed reality, and digital twins (a virtual representation of an object or system). The strategy aims to leverage real-time data, using machine learning and IoT, and employing AI simulation and blockchain, to enhance the human thinking processes.

With VARA (www.vara.ae) launching the only custom-designed regulations for the VA economy globally, Dubai has set the benchmark for jurisdictions seeking to support a responsible ecosystem offering interoperability and seamless passporting.

VARA is responsible for licensing and regulating the sector across Dubai Mainland and Free Zone territories (exclusive of DIFC). The Authority provides a full range of VA services in coordination with the Central Bank of the UAE and the Securities and Commodities Authority.

Demonstrating its commitment to the industry, VARA was also the first global authority to enter the metaverse, establishing its digital HQ in 'The Sandbox'.

In 2022, VARA formulated a Test-Adapt-Scale model to assist in developing its bespoke regulatory framework in collaboration with industry operators. It has since proven a compelling proposition for global future economy companies.

A host of the industry's biggest names are currently under licensing approval as part of VARA's exclusive regime, including virtual assets exchanges such as Binance, crypto.com, and Bybit. Traditional finance firms and banks seeking to provide DeFi (decentralised finance) solutions, such as Komainu and Laser Digital, are also seeking to be regulated by VARA, in addition to more than 50 global entities that are in the candidacy pool. Hex Trust and homegrown firm BitOasis have led the way as the first two to have received an operating licence by VARA in 2023 – with an additional 100 firms forecast to be operating by year-end.



2023 AND BEYOND

DUBAI: SETTING THE TOURISM BENCHMARK IN A POST-PANDEMIC WORLD

While many destinations continue to struggle in the wake of the pandemic, Dubai is demonstrating what can be achieved with a cohesive and forward-thinking tourism strategy

The impressive momentum that drove Dubai's tourism recovery in 2022 has continued into 2023, with the emirate welcoming 4.67 million overnight visitors in the first quarter of the year, marking a rise of 17 per cent YoY.

The impressive result was equivalent to 98 per cent of the pre-pandemic figure reported in Q1, 2019 – a year that went on to set a new benchmark for Dubai's tourism sector, with 16.79m arrivals recorded prior to the onset of the COVID-19 pandemic.

The sector's performance to date in 2023 not only puts Dubai firmly on track to improve on this benchmark, but also marks another important milestone as the emirate strives to reach its target of 25 million international visitors by 2030.

The latest UNWTO World Tourism Barometer report, published in January 2023, puts Dubai's impressive performance into context when compared with other major destinations and the global tourism industry's overall rate of recovery in the wake of the pandemic.

While more than 900 million tourists travelled internationally in 2022, the figure represented just 63 per cent of the number of travellers reported in 2019, prior to the pandemic. By comparison, Dubai welcomed 14.36 million travellers in 2022, which was equivalent to 85.5 per cent of 2019's 16.79 million visitors.

On a global basis, Dubai's performance appears even more impressive. According to UNWTO data, Europe – the world's most popular regional destination in 2022 – attracted less than 80 per cent of the number of visitors reported in 2019, while Africa recovered to 65 per cent and Asia Pacific clawed back just 23 per cent of its pre-pandemic performance, on account of lingering pandemic-

related travel restrictions.

Dubai's world-leading approach to combatting COVID-19 and safeguarding residents and visitors to the city through a series of orchestrated citywide health and safety measures introduced in 2020 provided travellers with the confidence to visit the emirate and enjoy everything it has to offer during the pandemic.

This pioneering approach helped consolidate Dubai's reputation as one of the world's safest cities to visit, which in turn drove visitor numbers through 2022 and generated the momentum that has carried through to 2023.

It also helped establish the emirate as one of the world's fastest-growing tourism destinations despite the lingering impact of the pandemic that is casting a shadow over other markets worldwide.

Dubai's performance helped spearhead a Middle East tourism revival in 2022, according to UNWTO data. The Middle East enjoyed the strongest relative increase in visitation across all global regions last year, with the number of arrivals reaching 83 per cent of 2019 levels – still shy of Dubai's 85.5 per cent.

The UNWTO cited the positive impact of large events such as Expo 2020 Dubai – which recorded 24 million visits during its six-month duration – and the FIFA World Cup in Qatar in its findings.

Looking ahead, while Dubai is already on track this year to reach or exceed the record achievements of 2019, the global tourism sector is predicted to struggle to return to its pre-pandemic levels in 2023.

While a UNWTO Panel of Experts survey published in January 2023 indicates that 72 per cent of respondents expect the global industry's performance to improve this year, 65 per cent also believed traveller volumes will not return to 2019 levels until 2024 or later.

Rising inflation, interest rates and lower levels of consumer spending are cited as potential headwinds that could weigh on a sustained recovery of the global tourism sector in 2023.

These findings provide a counterpoint to the UNWTO's own scenarios, which forecast international tourist arrivals could reach 80 – 95 per cent of pre-pandemic numbers this year.

Regardless, Dubai's world-beating performance in 2022 and into 2023 continues to provide an example to other major destinations as to what is possible in a post-pandemic environment. Its pioneering approach to spearheading the global tourism recovery means the eyes of the world will continue to focus on the city as it strives to set new benchmarks in 2023.

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Economy and Tourism

