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THE GROWTH OF THE HOSPITALITY INDUSTRY IN DUBAI

THE DEFINITION OF TOURISM

Tourism is travel for recreational, leisure or business purposes.

The World Tourism Organization defines tourists as people "traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes



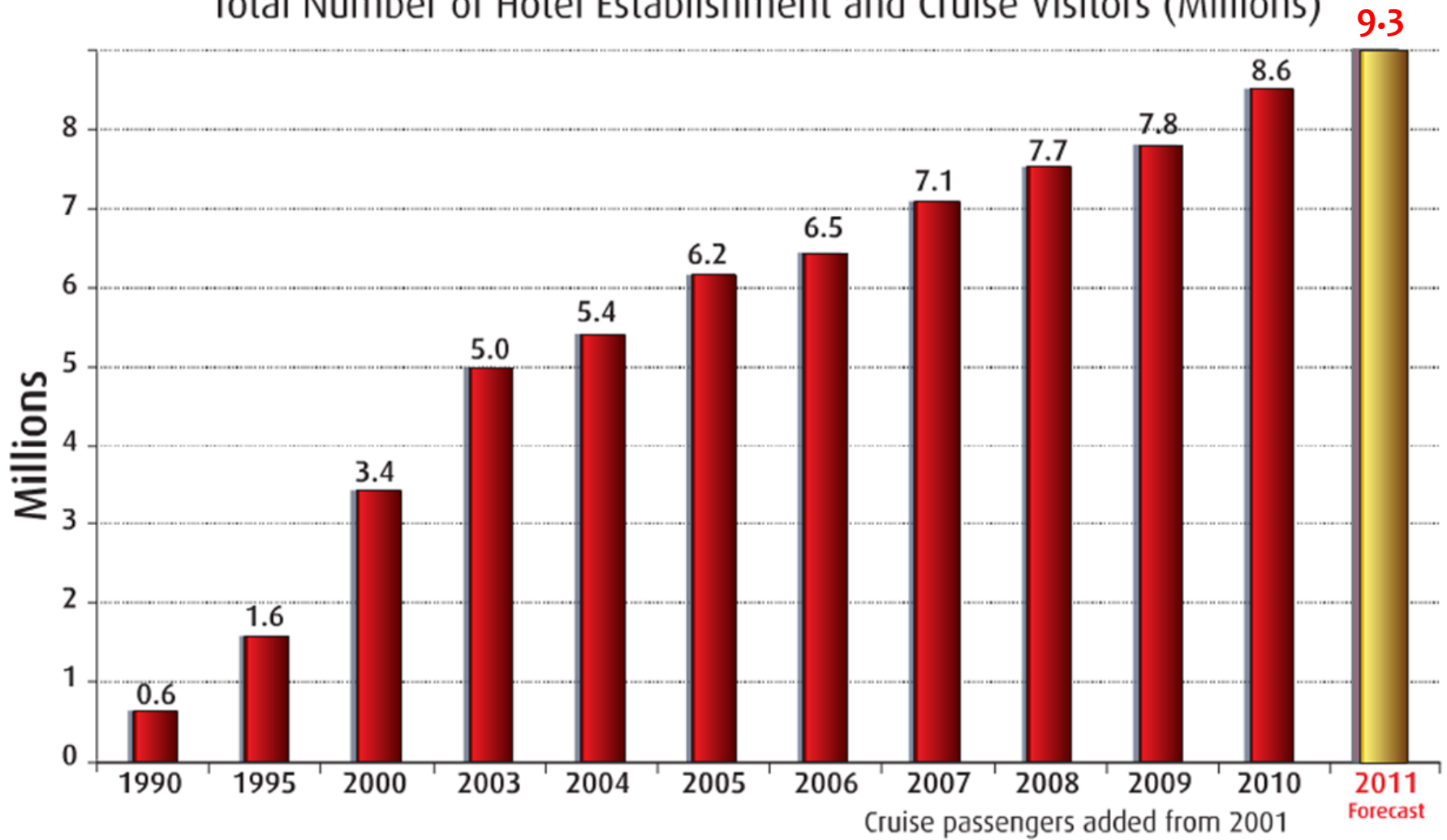


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TOURISM TRENDS & KEY OPERATING INDICATORS

1990-2011 | FORECAST

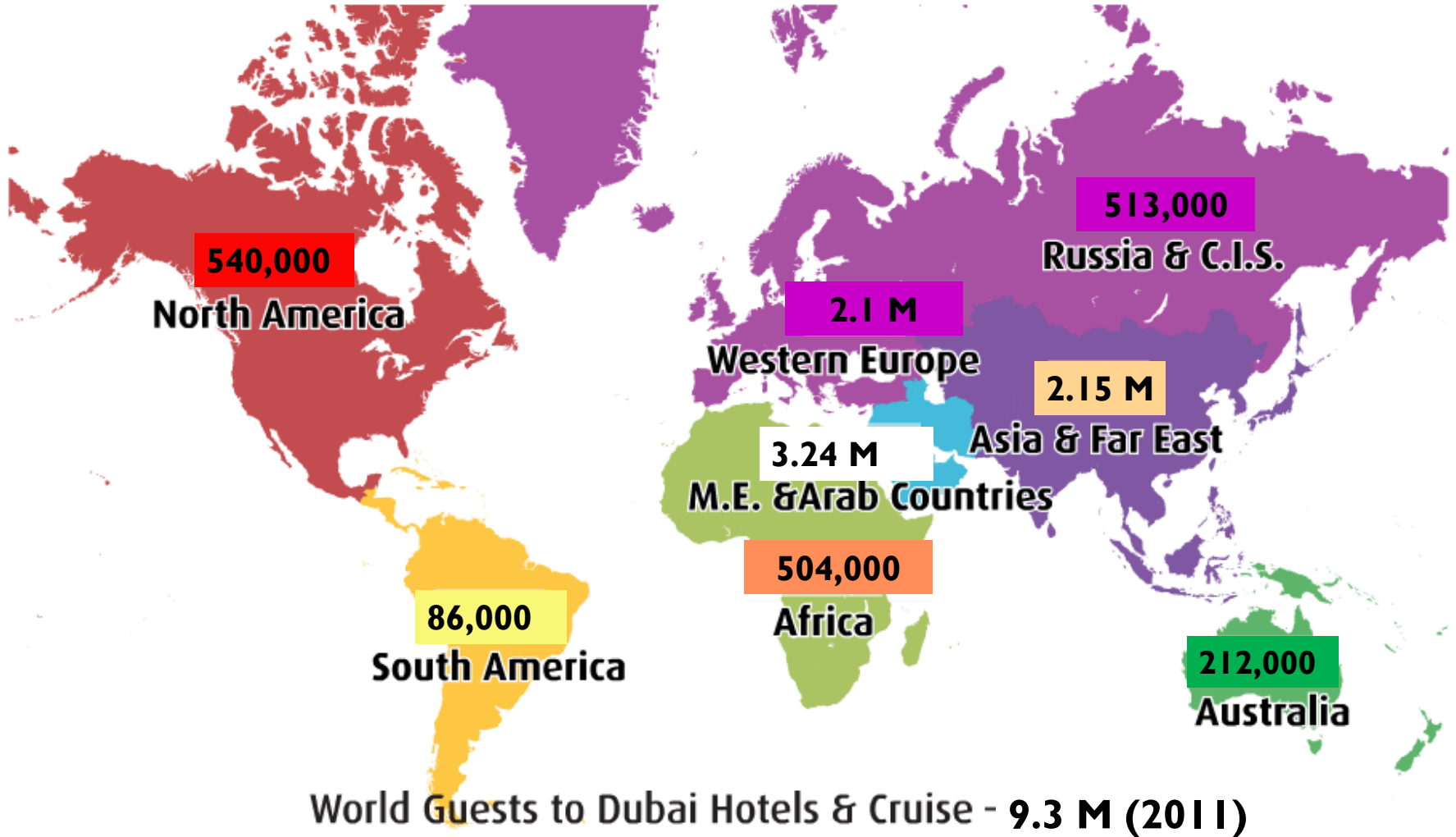
Total Number of Hotel Establishment and Cruise Visitors (Millions)



Source: One Stop Information Centre, DTCM



DUBAI VISITORS BY REGION



Source: One Stop Information Centre, DTCM



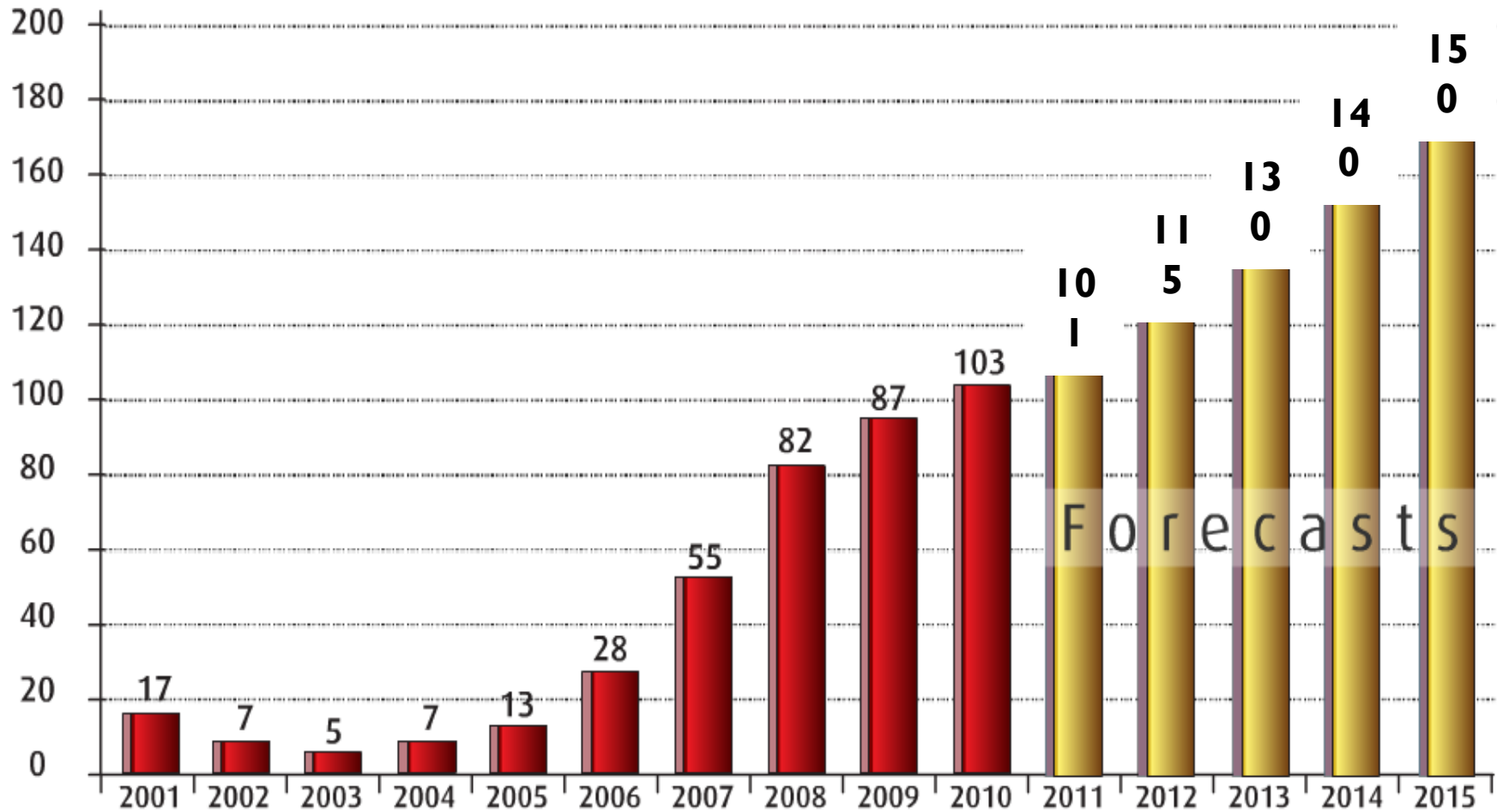
TOP SOURCE MARKETS

Rank	2011 OUTLOOK		2010		2009	
	Nationality	Total Guests	Nationality	Total Guests	Nationality	Total Guests
1	Saudi Arabia	795,000	UK	719,889	UK	714,877
2	India	687,986	India	638,103	India	529,536
3	UK	661,122	Iran	526,598	Iran	476,120
4	Iran	499,322	Saudi Arabia	519,001	Saudi Arabia	414,482
5	USA	459,748	USA	437,723	USA	395,390
6	Kuwait	290,783	Germany	281,484	Germany	283,319
7	Germany	271,435	Kuwait	218,762	Pakistan	204,115
8	Russia	238,924	Russia	209,381	Russia	183,308
9	Pakistan	218,151	Pakistan	196,937	Kuwait	173,959
10	Oman	204,921	Oman	184,516	Oman	154,477
11	China	193,191	Australia	158,907	Australia	150,011
12	Australia	165,536	China	152,076	France	141,759
13	France	153,394	France	147,677	Egypt	131,030
14	Egypt	148,859	Egypt	136,872	Italy	124,121
15	Qatar	125,859	Italy	115,734	Philippines	118,120
16	Philippines	122,794	Philippines	115,340	Canada	107,919
17	Italy	110,046	Canada	107,152	China	107,488
18	Jordan	95,712	Qatar	104,360	Qatar	95,431

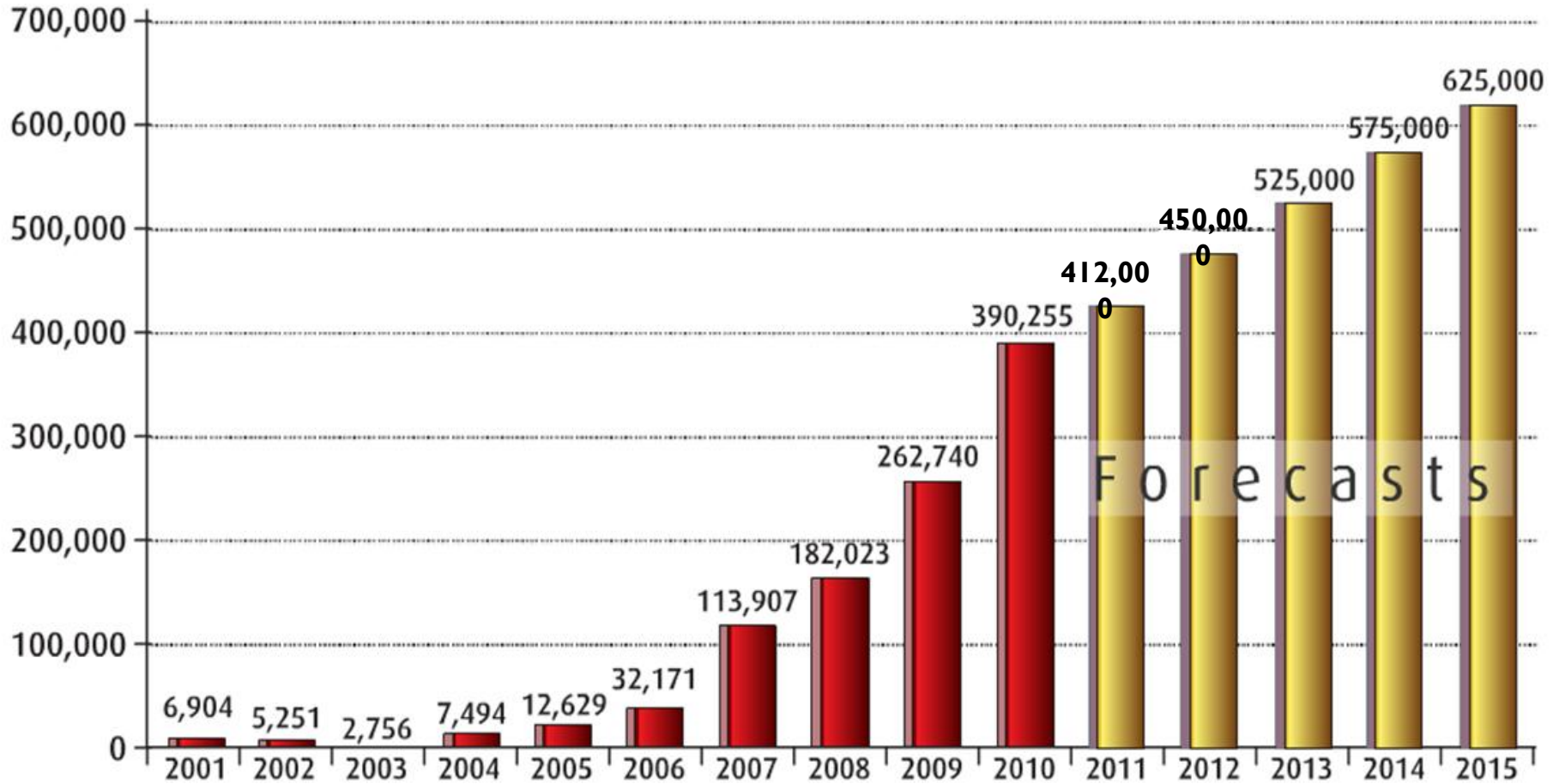
Source: One Stop Information Centre, DTCM



CRUISE SHIP CALL STATISTICS

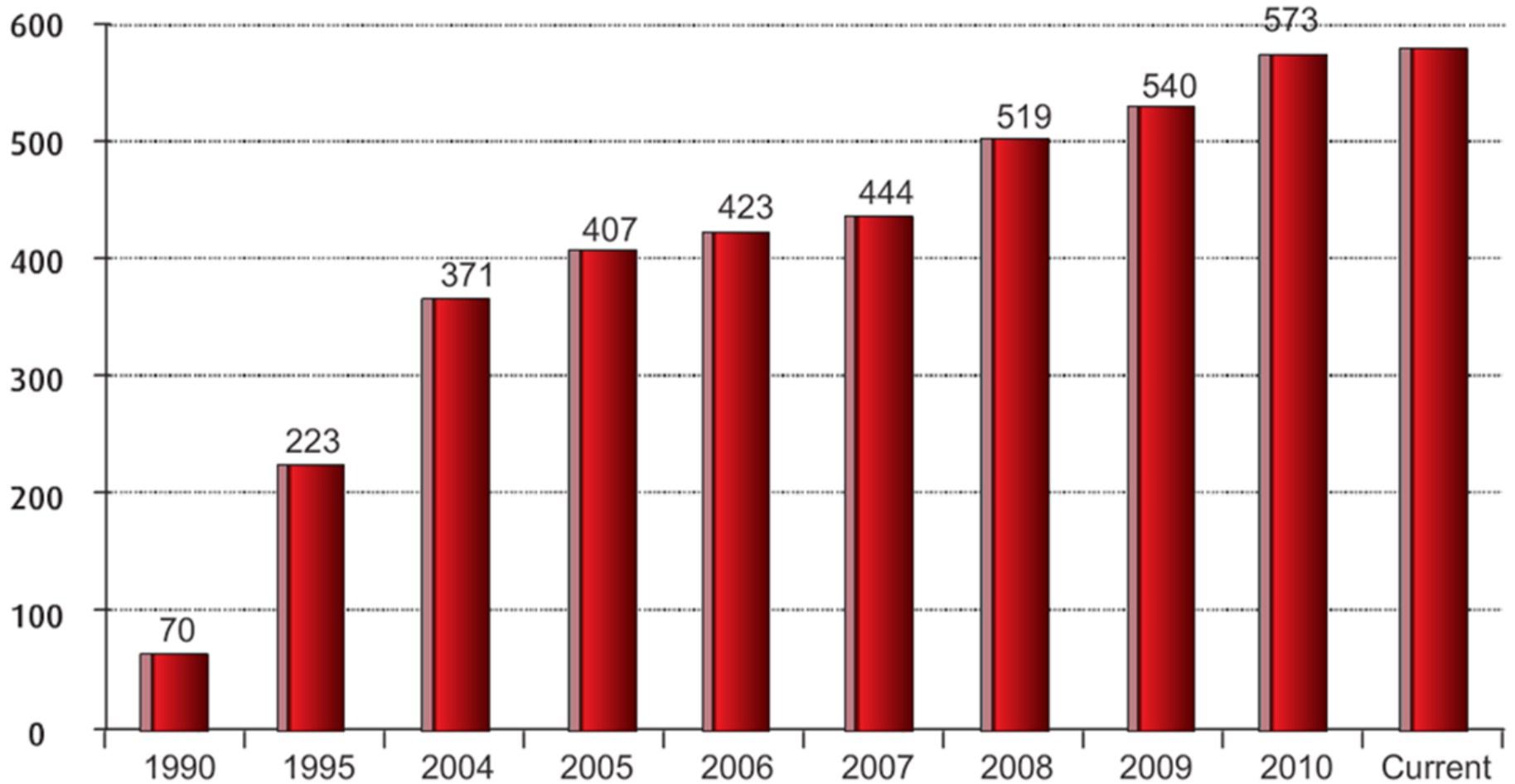


CRUISE PASSENGER STATISTICS



HOTEL ESTABLISHMENTS

Total Number of Hotel Establishment

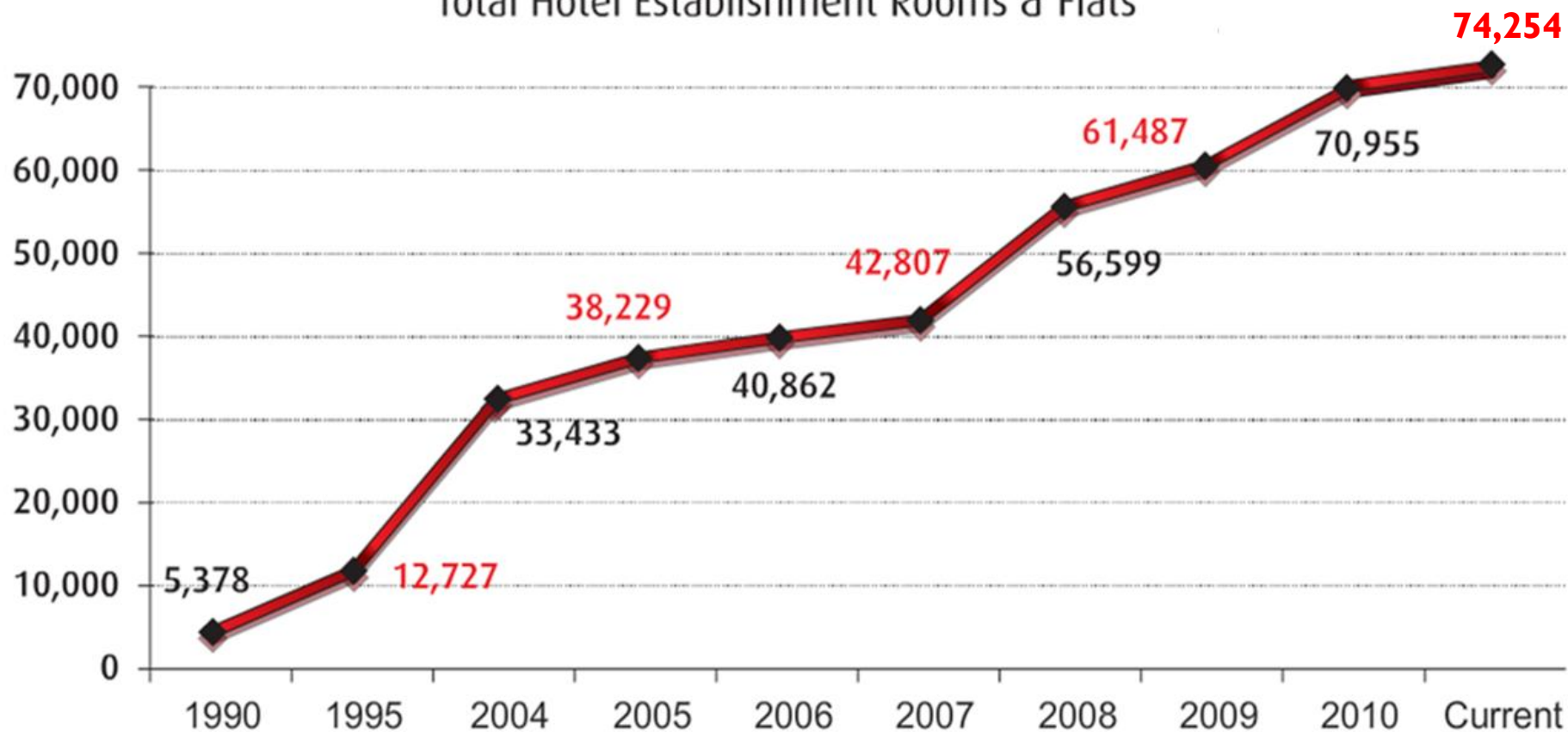


Source: One Stop Information Centre, DTCM



HOTEL ESTABLISHMENTS ROOM SUPPLY

Total Hotel Establishment Rooms & Flats



Source: One Stop Information Centre, DTCM



CURRENT DUBAI HOTEL & HOTEL APARTMENTS

Establishment	5-Star	4-Star	3-Star	2-Star	1-Star	Guest House	Non-Classified	Total	% Share
Total Beach Hotels	20		1				1	22	6%
Total City Hotels	42	75	59	51	122	18		367	94%
Total Hotels	62	75	60	51	122	18	1	389	100%
Total Beach Rooms	7,897		32				202	8,131	15%
Total City Rooms	12,308	14,316	8,224	5,274	4,501	464		45,096	85%
Total Rooms	20,205	14,316	8,256	5,274	4,501	464	202	53,227	100%
Rooms % Share	38%	27%	16%	10%	8%	1%	0%	100%	

Establishment	Deluxe	Standard	Total
Total Hotel Apartments	55	134	189
Total Flats/Units	7,505	13,522	21,027
% Share of Total Flats	36%	64%	100%

Total Hotel & Apartments	578
Total Rooms & Flats	74,254

Source: One Stop Information Centre, DTCM





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Air Accessibility Frequency & Seat Capacity

AIR ACCESS TO DUBAI – TOP 20

SL No	Departure Country	Monthly Arrivals Average (Jan-Jun 2011)					
		Frequency	First Class	Business Class	Economy / Coach Class	Total Seats	% Share
1	INDIA	1,617	7,604	36,706	292,400	336,710	10%
2	UNITED KINGDOM	779	7,699	38,782	220,405	266,885	8%
3	GERMANY	545	7,165	33,869	139,422	180,456	6%
4	SAUDI ARABIA	496	3,566	16,884	111,756	132,206	4%
5	UNITED STATES OF AMERICA	460	4,916	11,800	109,556	126,271	4%
6	PAKISTAN	531	1,717	9,271	100,621	111,608	3%
7	QATAR	466	2,332	12,226	91,993	106,551	3%
8	OMAN	553	1,366	9,502	95,291	106,159	3%
9	SOUTH AFRICA	298	3,580	12,530	80,121	96,231	3%
10	AUSTRALIA	269	3,044	12,291	80,313	95,649	3%
11	KUWAIT	421	2,383	7,234	79,795	89,412	3%
12	CHINA	271	2,150	9,691	71,090	82,931	3%
13	THAILAND	203	1,946	7,879	64,269	74,095	2%
14	IRAN, ISLAMIC REPUBLIC OF	427	936	3,759	67,414	72,109	2%
15	BAHRAIN	368	1,295	7,646	57,330	66,271	2%
16	EGYPT	221	382	6,470	56,374	63,226	2%
17	SINGAPORE	170	1,431	5,674	52,976	60,081	2%
18	NETHERLANDS	226	280	7,316	49,730	57,326	2%
19	FRANCE	179	2,186	9,785	44,679	56,650	2%
20	NEW ZEALAND	119	1,492	6,026	39,649	47,167	1%
	Top Countries	8,619	57,470	265,341	1,905,184	2,227,994	69%
	Rest of the World	3,893	24,759	112,117	869,601	1,006,478	31%
	Total Avg. Arrivals to Dubai	12,512	82,229	377,458	2,774,785	3,234,472	100%

Source: OAG MAX





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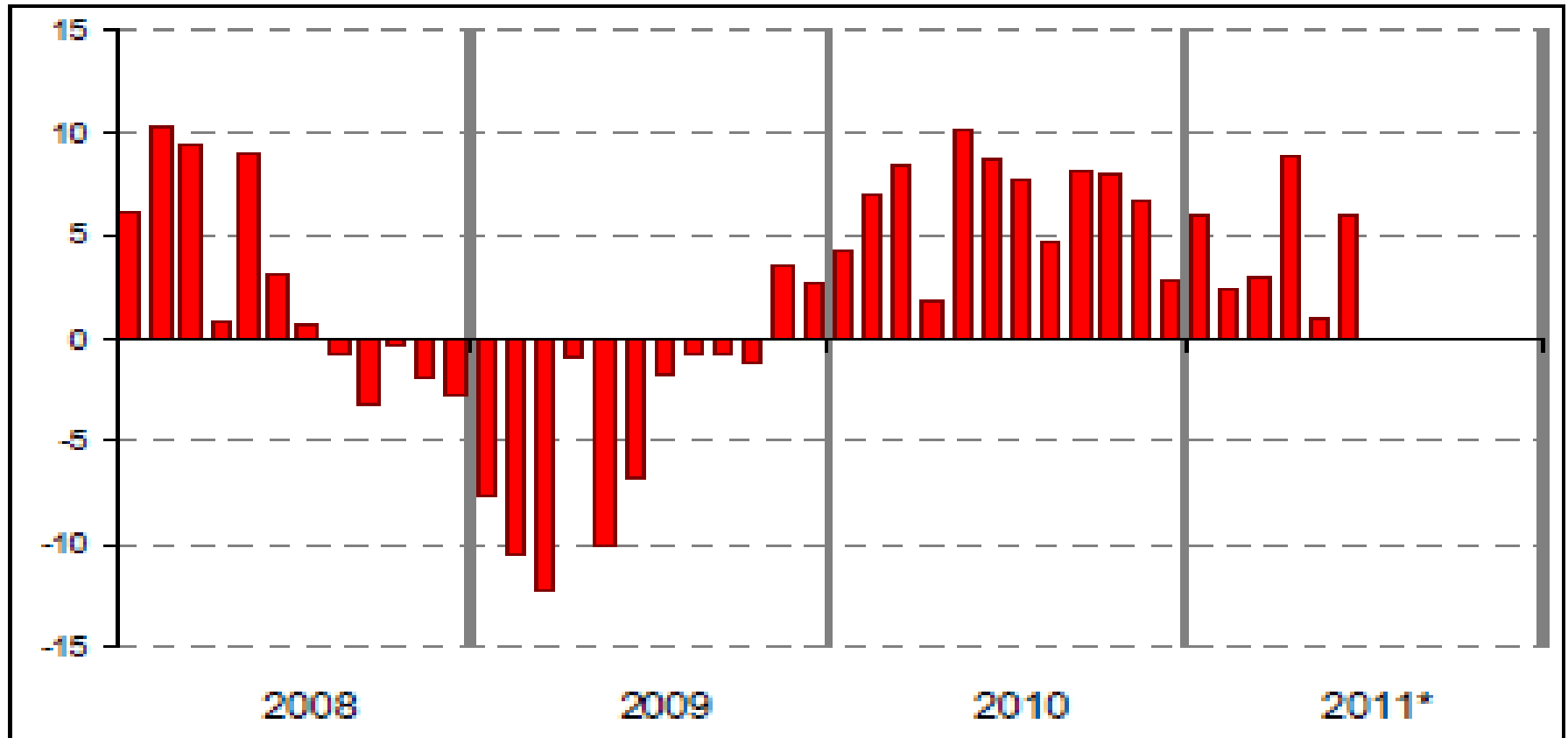
Global Tourism Trends (UNWTO)

GLOBAL TOURISM TRENDS (UNWTO)

International Tourist Arrivals, monthly evolution

World

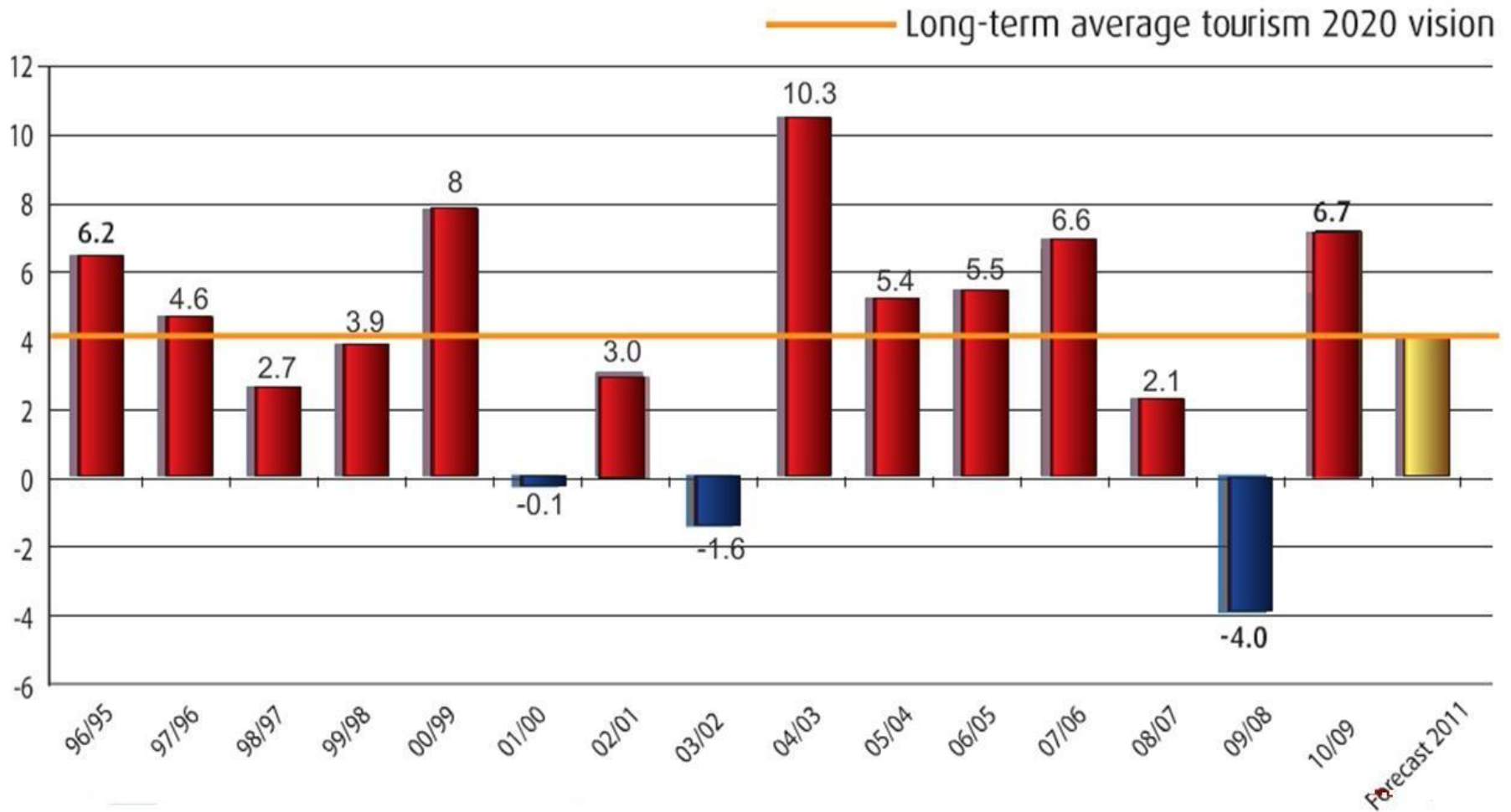
(% change)



GLOBAL TOURISM TRENDS (UNWTO)

International Tourist Arrivals, World

(% change)





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Dubai's Comparative Global Position

ECONOMIC IMPACT OF TOURISM- WORLD

	Current (Year 2011)
Direct Tourism Contribution to GDP (USD)	1,850 Billion
Total Tourism Contribution to GDP (USD)	6 Trillion
Direct Travel & Tourism Employment	99 Million
Total Travel & Tourism Employment	260 Million
International Arrivals Worldwide	940 Million

Source: WTTC, UNWTO



OCCUPANCY %

Occupancy (%)											
	City	Nov 2011	City	2010	City	2009	City	2008			
	Rooms = 74,254		Rooms = 70,955		Rooms = 61,487		Rooms = 56,599				
1	London	83.1	Sydney	83.5	London	80.5	New York	81.9			
2	Hong Kong	83.3	London	82.1	Sydney	78.5	Hong Kong	81.2			
3	Sydney	82.7	Hong Kong	81.3	New York	77.2	London	79.8			
4	New York	81.2	New York	80.9	Paris	73.8	Sydney	79.4			
5	Paris	79.7	Tokyo	78.2	Hong Kong	73.5	Dubai	78.9			
6	Dubai	74.9	Paris	76.3	Tokyo	70.6	Paris	77.9			
7	Tokyo	73.5	Dubai	71.0	Dubai	69.4	Tokyo	75.6			
8	Los Angeles	72.7	Berlin	69.0	Berlin	67.8	Cairo	74.8			
9	Berlin	70.5	Toronto	68.3	Cairo	64.9	Los Angeles	71.3			
10	Toronto	69.6	Los Angeles	68.0	Los Angeles	64.3	Berlin	69.5			
11	Rome	69.2	Buenos Aires	66.6	Rome	62.8	Buenos Aires	69.2			
12	Beijing	68.9	Rome	66.4	Toronto	62.3	Toronto	67.6			
13	Buenos Aires	67.1	Cairo	64.5	Madrid	57.6	Rome	64.9			
14	Madrid	66.9	Madrid	63.6	Buenos Aires	55.6	Madrid	63.8			
15	Cairo	N/A	Beijing	63.1	Beijing	51.6	Beijing	55.3			



OCCUPANCY %

Occupancy (%)											
	City	Nov 2011		City	2010		City	2009		City	2008
	Rooms = 74,254			Rooms = 70,955			Rooms = 61,487			Rooms = 56,599	
1	London	83.1		Sydney	83.5		London	80.5		New York	81.9
2	Hong Kong	83.3		London	82.1		Sydney	78.5		Hong Kong	81.2
3	Sydney	82.7		Hong Kong	81.3		New York	77.2		London	79.8
4	New York	81.2		New York	80.9		Paris	73.8		Sydney	79.4
5	Paris	79.7		Tokyo	78.2		Hong Kong	73.5		Dubai	78.9
6	Dubai	74.9		Paris	76.3		Tokyo	70.6		Paris	77.9
7	Tokyo	73.5		Dubai	71.0		Dubai	69.4		Tokyo	75.6
8	Los Angeles	72.7		Berlin	69.0		Berlin	67.8		Cairo	74.8
9	Berlin	70.5		Toronto	68.3		Cairo	64.9		Los Angeles	71.3
10	Toronto	69.6		Los Angeles	68.0		Los Angeles	64.3		Berlin	69.5
11	Rome	69.2		Buenos Aires	66.6		Rome	62.8		Buenos Aires	69.2
12	Beijing	68.9		Rome	66.4		Toronto	62.3		Toronto	67.6
13	Buenos Aires	67.1		Cairo	64.5		Madrid	57.6		Rome	64.9
14	Madrid	66.9		Madrid	63.6		Buenos Aires	55.6		Madrid	63.8
15	Cairo	N/A		Beijing	63.1		Beijing	51.6		Beijing	55.3



AVERAGE ROOM RATE (USD)

Average Room Rate								
	City	Nov 2011	City	2010	City	2009	City	2008
1	Paris	335	New York	232	Dubai	235	Dubai	300
2	Hong Kong	242	Tokyo	229	Paris	234	New York	276
3	New York	241	Paris	226	Tokyo	229	Paris	268
4	Dubai	220	Dubai	218	New York	215	Rome	229
5	London	217	Hong Kong	205	Rome	193	London	217
6	Rome	211	London	196	London	183	Tokyo	203
7	Sydney	192	Rome	183	Hong Kong	168	Hong Kong	185
8	Tokyo	164	Sydney	166	Buenos Aires	143	Sydney	168
9	Buenos Aires	148	Buenos Aires	137	Sydney	137	Madrid	166
10	Toronto	138	Cairo	133	Cairo	129	Buenos Aires	153
11	Madrid	125	Toronto	130	Madrid	128	Beijing	151
12	Los Angeles	124	Madrid	118	Toronto	115	Toronto	136
13	Berlin	121	Los Angeles	116	Los Angeles	114	Cairo	130
14	Beijing	101	Berlin	115	Berlin	112	Berlin	129
15	Cairo	N/A	Beijing	94	Beijing	93	Los Angeles	128

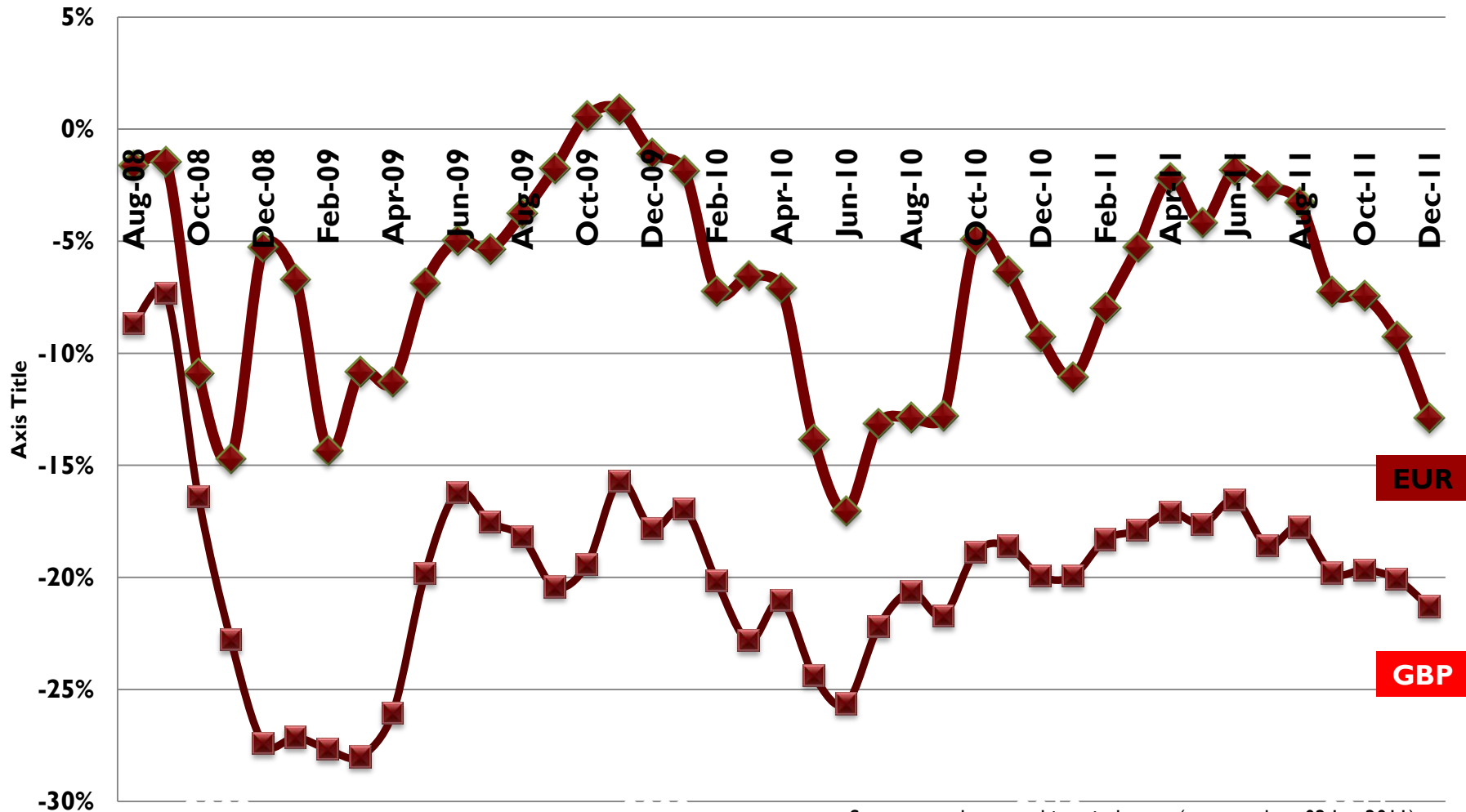


REVENUE PER AVAILABLE ROOM (USD)

RevPAR								
	City	Nov 2011	City	2010	City	2009	City	2008
1	Paris	267	New York	188	Paris	173	Dubai	237
2	Hong Kong	202	Tokyo	179	New York	166	New York	226
3	New York	196	Paris	172	Dubai	163	Paris	209
4	London	181	Hong Kong	167	Tokyo	162	London	173
5	Dubai	165	London	161	London	147	Tokyo	153
6	Sydney	159	Dubai	154	Hong Kong	123	Hong Kong	151
7	Rome	146	Sydney	139	Rome	121	Rome	149
8	Tokyo	121	Rome	121	Sydney	107	Sydney	133
9	Buenos Aires	99	Buenos Aires	91	Cairo	84	Buenos Aires	106
10	Toronto	96	Toronto	89	Buenos Aires	79	Madrid	106
11	Los Angeles	90	Cairo	86	Berlin	76	Cairo	97
12	Berlin	85	Berlin	79	Madrid	74	Toronto	92
13	Madrid	84	Los Angeles	79	Los Angeles	73	Los Angeles	91
14	Beijing	69	Madrid	75	Toronto	72	Berlin	90
15	Cairo	N/A	Beijing	59	Beijing	48	Beijing	83



IMPACT OF CURRENCY FLUCTUATION



Source: oanda.com – historical rates (extracted on 02 Jun 2011)





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ROOM SUPPLY PIPELINE

DUBAI HOTEL ESTABLISHMENT ROOM CAPACITY

Indicators	Establishments	2008	2009	2010	Current	Rooms Under Construction	Future Room Capacity
Hotel & Hotel Apartment	Hotel	351	352	382	389	41	436
	Hotel Apartments	168	188	191	189	2	194
	Total	519	540	573	578	43	630
	% change		4%	6%	7%		8%
Total Rooms/Flats (Units)	Hotel Rooms	40,981	43,419	51,115	53,227	14,917	69,775
	Hotel Apartments Flats	15,618	18,068	19,840	21,027	180	21,949
	Total	56,599	61,487	70,955	74,254	15,097	91,724
	% change		9%	15%	21%		24%

Source: One Stop Information Centre, DTCM



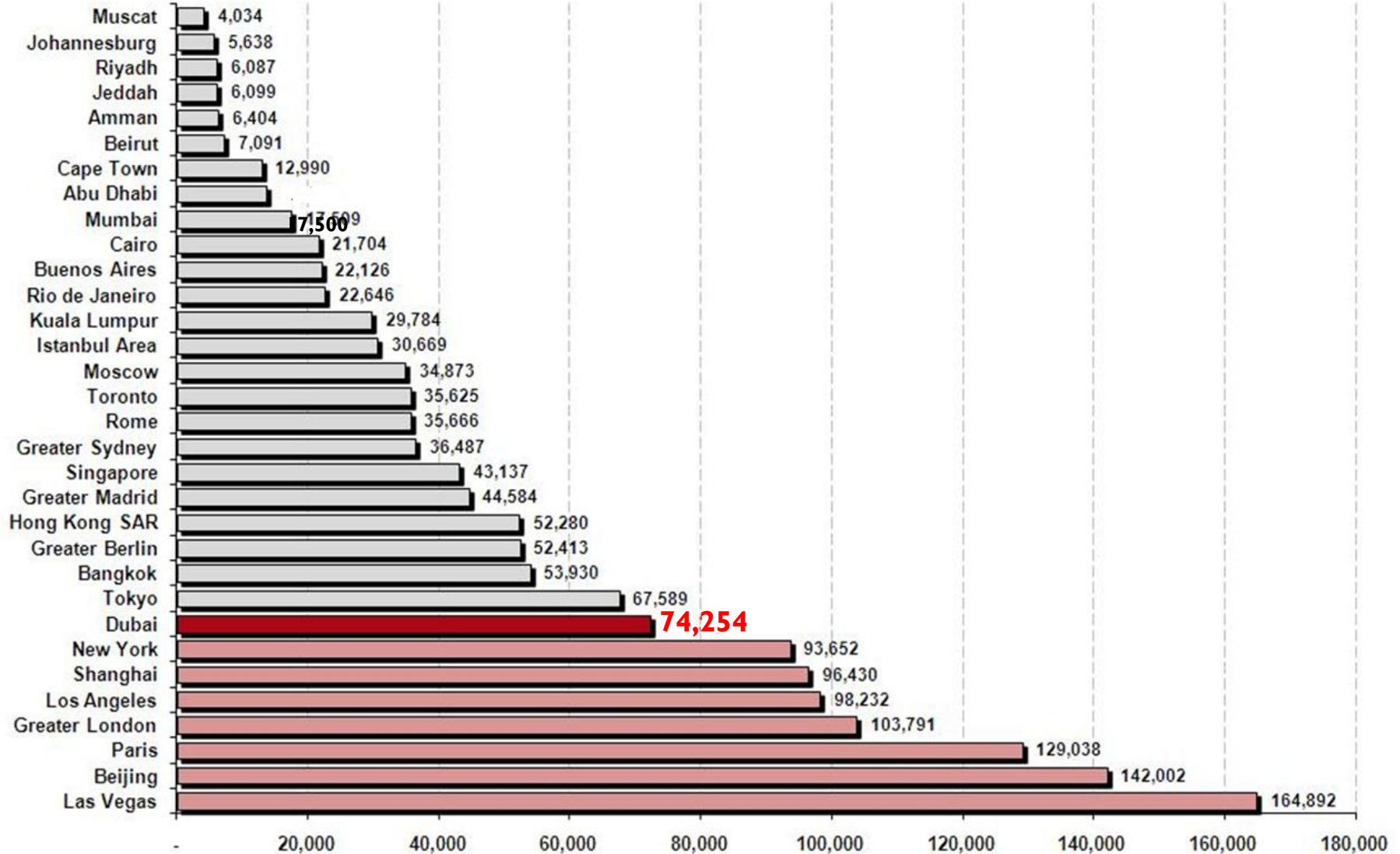
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	Total	519	540	573	578	43	630
	% change		4%	6%	7%		8%
Total Rooms/Flats (Units)	Hotel Rooms	40,981	43,419	51,115	53,227	14,917	69,775
	Hotel Apartments Flats	15,618	18,068	19,840	21,027	180	21,949
	Total	56,599	61,487		94% - 5 Star 6% - 4 Star	15,097	91,724
	% change		9%	15%	21%		24%

Source: One Stop Information Centre, DTCM



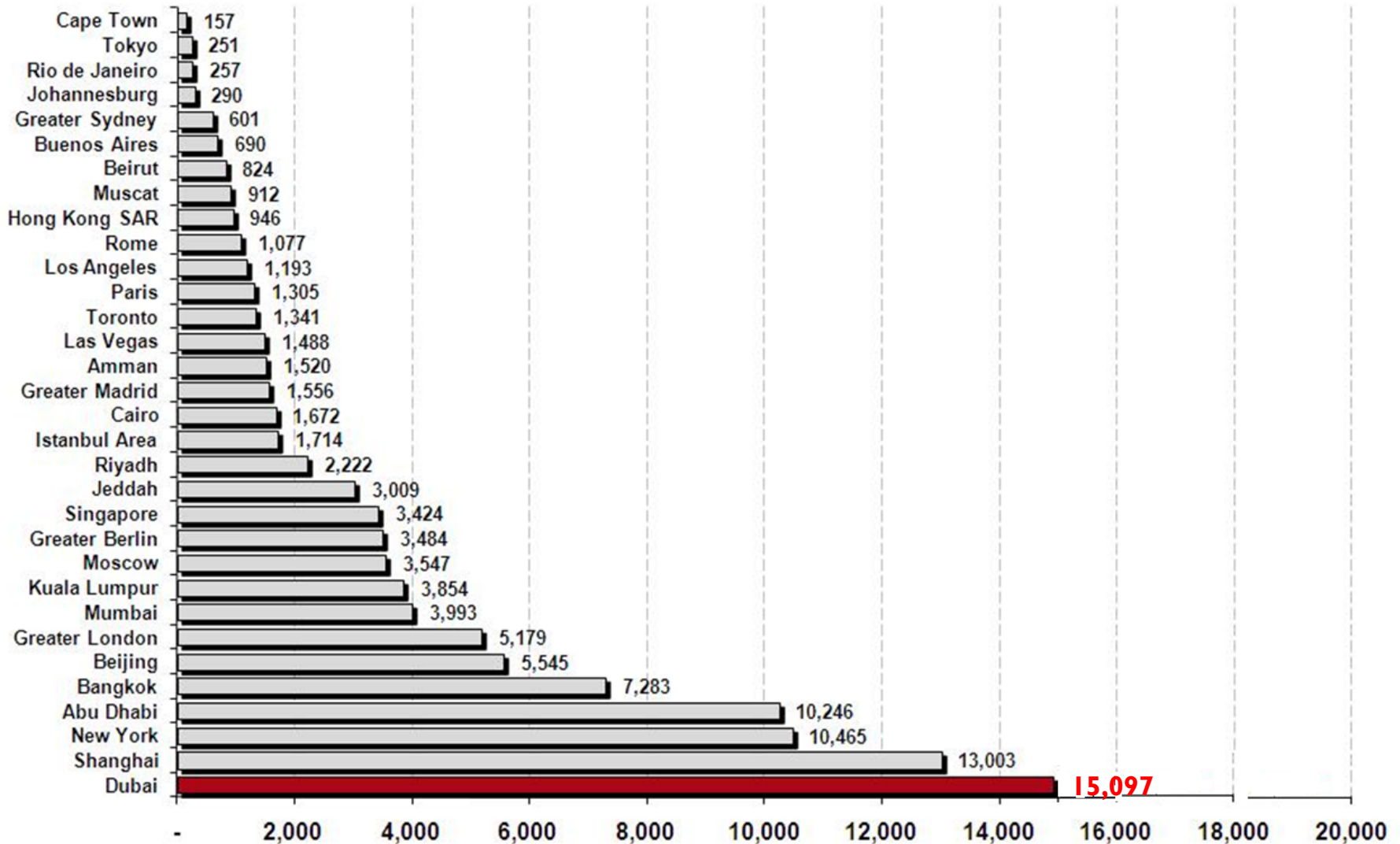
GLOBAL HOTEL ESTABLISHMENT ROOM SUPPLY (CURRENT)



Source: STR Global Market Pipeline Report



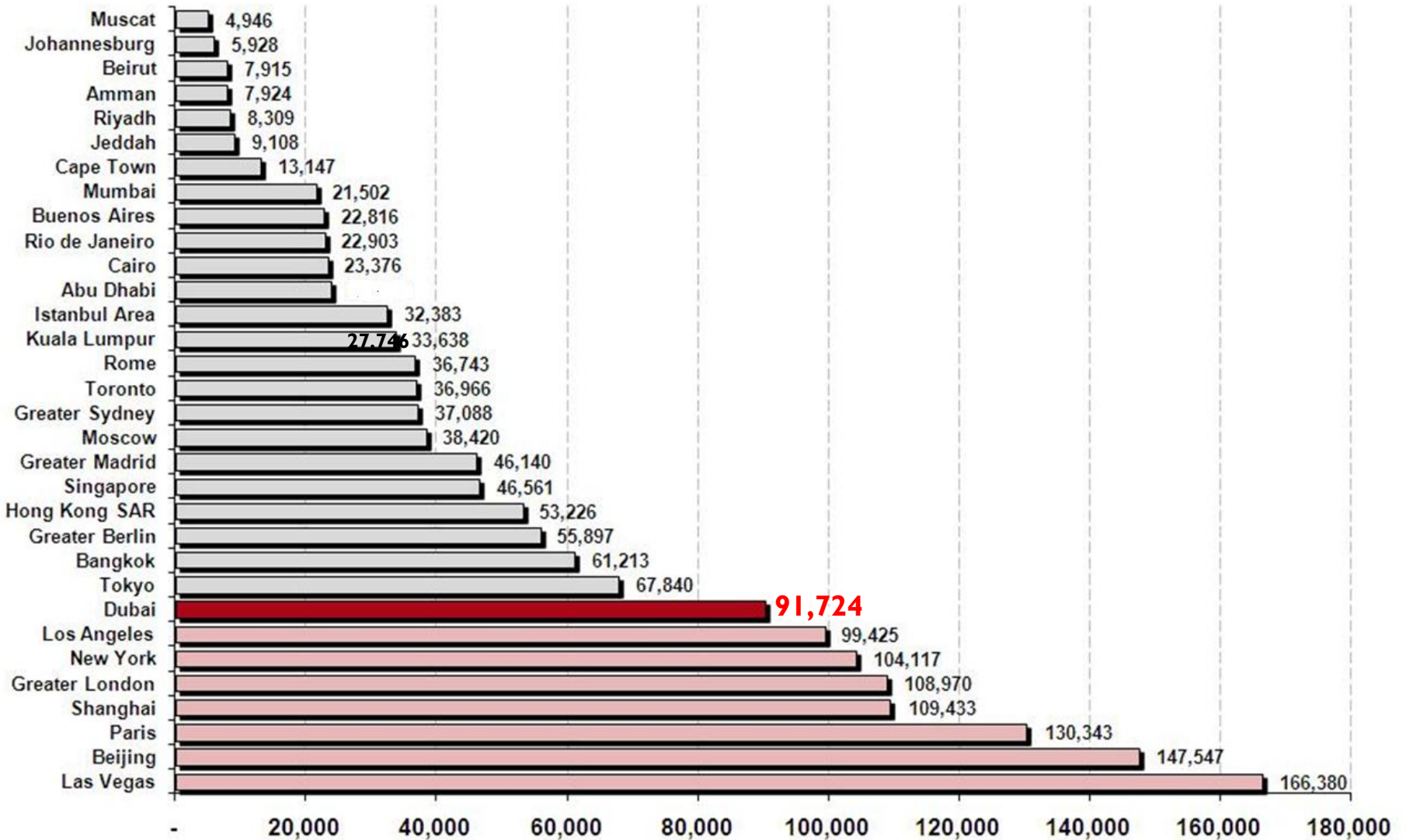
GLOBAL HOTEL ESTABLISHMENT ROOM SUPPLY (UNDER CONSTRUCTION)



Source: STR Global Market Pipeline Report



GLOBAL HOTEL ESTABLISHMENT ROOM SUPPLY (COMBINED CURRENT & UNDER CONSTRUCTION)



Source: STR Global Market Pipeline Report





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WORLD OUTBOUND

GLOBAL OUTBOUND TRAVELERS

	World Outbound Visitors '000	2010	Short Haul	Short Haul %	Medium Haul	Medium Haul %	Long Haul	Long Haul %	Inbound to Dubai	Dubai Inbound MH & LH %
1	GERMANY	92,017	75,546	82.1%	7,729	8.4%	8,742	9.5%	281	1.7%
2	UNITED KINGDOM	87,906	59,512	67.7%	9,933	11.3%	18,460	21.0%	720	2.5%
3	UNITED STATES	87,043	24,807	28.5%	23,763	27.3%	38,473	44.2%	438	0.7%
4	FRANCE	42,923	32,536	75.8%	2,919	6.8%	7,469	17.4%	148	1.4%
5	CHINA	33,045	23,892	72.3%	4,164	12.6%	4,990	15.1%	152	1.7%
6	NETHERLANDS	31,326	27,504	87.8%	720	2.3%	3,101	9.9%	80	2.1%
7	CANADA	30,673	20,306	66.2%	1,288	4.2%	9,079	29.6%	116	1.1%
8	ITALY	29,778	25,758	86.5%	417	1.4%	3,603	12.1%	116	2.9%
9	JAPAN	26,237	2,702	10.3%	10,521	40.1%	13,014	49.6%	54	0.2%
10	SINGAPORE	22,008	18,883	85.8%	2,487	11.3%	638	2.9%	47	1.5%
11	SPAIN	21,576	17,908	83.0%	971	4.5%	2,697	12.5%	31	0.8%
12	BELGIUM	20,025	18,023	90.0%	1,001	5.0%	1,001	5.0%	27	1.3%
13	MEXICO	19,938	17,825	89.4%	459	2.3%	1,655	8.3%	6	0.3%
14	SWITZERLAND	19,160	17,014	88.8%	402	2.1%	1,744	9.1%	52	2.4%
15	KOREA, REPUBLIC OF	15,457	8,300	53.7%	4,204	27.2%	2,952	19.1%	48	0.7%
16	TAIWAN	12,116	10,153	83.8%	897	7.4%	1,066	8.8%	3	0.2%
17	SWEDEN	11,565	8,836	76.4%	1,006	8.7%	1,723	14.9%	41	1.5%
18	DENMARK	9,921	8,274	83.4%	625	6.3%	1,022	10.3%	31	1.9%
19	AUSTRIA	9,576	8,417	87.9%	297	3.1%	862	9.0%	38	3.3%
20	INDIA	9,509	1,540	16.2%	5,715	60.1%	2,254	23.7%	638	8.0%
21	IRELAND	8,890	7,379	83.0%	418	4.7%	1,093	12.3%	35	2.3%
22	UKRAINE	8,174	687	8.4%	7,299	89.3%	188	2.3%	43	0.6%
23	MALAYSIA	7,807	4,965	63.6%	2,092	26.8%	749	9.6%	44	1.6%
24	THAILAND	7,028	6,037	85.9%	499	7.1%	492	7.0%	19	1.9%
25	FINLAND	6,858	3,230	47.1%	2,976	43.4%	652	9.5%	24	0.7%
26	NORWAY	6,709	4,522	67.4%	1,409	21.0%	778	11.6%	31	1.4%
27	SOUTH AFRICA	4,920	3,311	67.30%	177	3.60%	1,432	29.10%	79	4.9%
	Major Outbound Destinations	682,185	457,867	67.30%	94,389	3.60%	129,929	29.10%	3,340	1.5%
	Major Outbound Destinations %	73%							39%	
	Rest of the World	257,815							5,260	
	Rest of the World %	27%							61%	
	World Outbound	940,000							8,600	
	% Change	6.7%								
	Total of Medium & Long Haul Market Share from top 27 world outbound destinations to Dubai	3.8%								

	2010	2009	2008
	940,000	881,000	916,000
	6.7%	-3.8%	



	World Outbound Visitors '000	2010	Short Haul	Short Haul %	Medium Haul	Medium Haul %	Long Haul	Long Haul %	Inbound to Dubai	Dubai Inbound MH & LH %
1	GERMANY	92,017	75,546	82.1%	7,729	8.4%	8,742	9.5%	281	1.7%
2	UNITED KINGDOM	87,906	59,512	67.7%	9,933	11.3%	18,460	21.0%	720	2.5%
3	UNITED STATES	87,043	24,807	28.5%	23,763	27.3%	38,473	44.2%	438	0.7%
4	FRANCE	42,923	32,536	75.8%	2,919	6.8%	7,469	17.4%	148	1.4%
5	CHINA	33,045	23,892	72.3%	4,164	12.6%	4,990	15.1%	152	1.7%
6	NETHERLANDS	31,326	27,504	87.8%	720	2.3%	3,101	9.9%	80	2.1%
7	CANADA	30,673	20,306	66.2%	1,288	4.2%	9,079	29.6%	116	1.1%
8	ITALY	29,778	25,758	86.5%	417	1.4%	3,603	12.1%	116	2.9%
9	JAPAN	26,237	2,702	10.3%	10,521	40.1%	13,014	49.6%	54	0.2%
10	SINGAPORE	22,008	18,883	85.8%	2,487	11.3%	638	2.9%	47	1.5%
11	SPAIN	21,576	17,908	83.0%	971	4.5%	2,697	12.5%	31	0.8%
12	BELGIUM	20,025	18,023	90.0%	1,001	5.0%	1,001	5.0%	27	1.3%
13	MEXICO	19,938	17,825	89.4%	459	2.3%	1,655	8.3%	6	0.3%
14	SWITZERLAND	19,160	17,014	88.8%	402	2.1%	1,744	9.1%	52	2.4%
15	KOREA, REPUBLIC OF	15,457	8,300	53.7%	4,204	27.2%	2,952	19.1%	48	0.7%
16	TAIWAN	12,116	10,153	83.8%	897	7.4%	1,066	8.8%	3	0.2%
17	SWEDEN	11,565	8,836	76.4%	1,006	8.7%	1,723	14.9%	41	1.5%
18	DENMARK	9,921	8,274	83.4%	625	6.3%	1,022	10.3%	31	1.9%
19	AUSTRIA	9,576	8,417	87.9%	297	3.1%	862	9.0%	38	3.3%
20	INDIA	9,509	1,540	16.2%	5,715	60.1%	2,254	23.7%	638	8.0%
21	IRELAND	8,890	7,379	83.0%	418	4.7%	1,093	12.3%	35	2.3%
22	UKRAINE	8,174	687	8.4%	7,299	89.3%	188	2.3%	43	0.6%
23	MALAYSIA	7,807	4,965	63.6%	2,092	26.8%	749	9.6%	44	1.6%
24	THAILAND	7,028	6,037	85.9%	499	7.1%	492	7.0%	19	1.9%
25	FINLAND	6,858	3,230	47.1%	2,976	43.4%	652	9.5%	24	0.7%
26	NORWAY	6,709	4,522	67.4%	1,409	21.0%	778	11.6%	31	1.4%
27	SOUTH AFRICA	4,920	3,311	67.30%	177	3.60%	1,432	29.10%	79	4.9%
	Major Outbound Destinations	682,185	457,867	67.30%	94,389	3.60%	129,929	29.10%	3,340	1.5%
	Major Outbound Destinations %	73%							39%	
	Rest of the World	257,815							5,260	
	Rest of the World %	27%							61%	
	World Outbound	940,000							8,600	
	% Change	6.7%								
	Total of Medium & Long Haul Market Share from top 27 world outbound destinations to Dubai	3.8%								

	2010	2009	2008
	940,000	881,000	916,000
	6.7%	-3.8%	





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THANK YOU