

A night-time photograph of the Dubai skyline, featuring the Burj Khalifa as the central focus. The city is illuminated with various lights, and the sky is a deep blue with some clouds. The Burj Khalifa is the tallest building, with its spire reaching towards the top of the frame. Other prominent buildings include the BurjDubai and the BurjDubai. The overall scene is a vibrant and modern cityscape.

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Economy and Tourism

DUBAI GASTRONOMY INDUSTRY REPORT

SEPTEMBER 2022

FOREWORD

DUBAI: THE EPICENTRE FOR GASTRONOMICAL TRAVEL

The eclectic, dynamic nature of Dubai's culinary experiences reflects its inherent personality as a global microcosm – a melting pot of more than 200 nationalities coming together to create one of the world's most diverse gastronomy hubs.

The city's 13,000 F&B outlets span homegrown eateries and neighbourhood cafes to a dozen MICHELIN-star restaurants offering the full spectrum from casual, social, to exclusive fine dining. This inherent diversity of Dubai's F&B offerings is testament to its unique multicultural make-up and its growing status as one of the world's most liveable cities that caters to every palate - literally and figuratively.

Dubai has established itself as one of the most popular business and leisure destinations on the planet, and the quality and array of international cuisines on offer resonates with the demand making it one of the highest in terms of outlets density per capita.

Highlighting its growing global stature, Dubai was declared the world's fourth-best destination for food lovers in the Tripadvisor 2022 Travellers' Choice Awards, which are judged by millions of Tripadvisor users worldwide.

Dubai ranked ahead of traditional A-listers Barcelona, New York, Bangkok and Singapore, which was a remarkable achievement that reflects not only the growing esteem, but particularly the elevated confidence in its quality coming out of a global health crisis.

Dubai is clearly the Middle East and North Africa's F&B capital, as evidenced by the city dominating 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. Exciting and innovative casual dining restaurant 3Fils, located in Dubai Fishing Harbour, also claimed overall honours as the MENA region's best restaurant.

Celebrated talents within Dubai's diverse gastronomical landscape were also recognised on the 2022 global food stage programme, 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 is the first city in the region to feature its own prestigious MICHELIN Guide where the 2022 selection ranks 69 restaurants covering 21 cuisine types: 14 restaurants get a Bib Gourmand, nine received a MICHELIN Star and two received two MICHELIN Stars.

In 2022, the UAE also welcomed the dedicated guide by renowned fine dining food critique brand Gault&Millau to Dubai's fast-evolving F&B scene. Originally launched in the 1960s in Paris, by journalists Henri Gault and Christian Millau, the highly respected guide is renowned for its unbiased, independent restaurant reviews signaling the performance of Dubai's status on the culinary map.

This accelerated journey of a young destination to such a status of global acclaim in one of the most competitive sectors worldwide, is a tribute to the vision of its leaders, who are positioning the city's F&B sector as a key pillar of the emirate's long-term tourism growth strategy.

Ahmed Al Khaja

CEO of Dubai Festivals and Retail Establishment

13,000

F&B outlets | Dubai is home to around 13,000 cafes and restaurants – the most of any city in the MENA region

1st

Dubai's 3Fils was crowned best restaurant at the Middle East & North Africa's 50 Best Restaurants awards. It has also been named among the world's top 100 restaurants alongside newcomer Orfali Bros

4th

Best destination for food lovers | Dubai was declared the world's fourth-best destination for food lovers in Tripadvisor's 2022 Travellers' Choice Awards

GLOBAL OVERVIEW: FOOD TOURISM

HOW FOOD TOURISM IS RESHAPING THE GLOBAL TRAVEL INDUSTRY

As a key driver of the global tourism sector, food tourism has a major role to play in accelerating the industry's growth in the coming years

Food tourism represents one of the fastest-growing sectors of the global tourism industry. According to a 2022 report published by Research and Markets, the global food tourism market was valued at US\$696.5 billion in 2021, and is projected to expand at a compound annual growth rate (CAGR) of 17.4 per cent to be worth US\$1,796.5 billion by 2027.

This is particularly revealing when taken in context of the luxury travel market, recognised as the industry's highest-value segment, which generated revenues of US\$1,794.4 billion in 2021 and is forecast to grow at a CAGR of less than a third (5.3 per cent) from 2021 to 2028.

According to industry analyst Allied Market Research (AMR), food festivals are currently driving much of the specialist food tourism sector's growth, with this segment forecast to generate revenues of US\$560.3 billion in 2027, up from US\$338.6 billion in 2019, marking a CAGR of 17.2 per cent.

While Europe has traditionally dominated the global food tourism sector, as evidenced by the fact that European cities accounted for 12 of the top 20 destinations for food lovers in Tripadvisor's 2022 Travellers' Choice Awards, Dubai's reputation as the world's most diverse city, and one of its great cultural melting pots makes it ideally suited for food-loving travellers looking for unique destinations that offer unmatched diversity of dining experiences.

Dubai's Department of Economy and Tourism (DET), which is positioning gastronomy as a cornerstone of the city's tourism growth plans, recently revealed its strategy for sector, promotions to highlight the breadth, depth and authenticity of available dining options.

In the immediate term, DET plans to roll out a series of initiatives in conjunction with industry stakeholders to further catalyse growth, increase consumer spend and further elevate the city's reputation as a top gastronomy destination by exploring new food industry innovations and culinary experiences.

Dubai's standing as one of the world's fastest-growing food tourism destinations is showcased hereunder, which highlights the city's reputation among food lovers surveyed in key visitor source markets.

The data surveys each market, to reveal that Dubai's visitors from Saudi Arabia and Russia rank it first overall as a gastronomy destination, while the city ranks among the top two destinations for fine dining in Saudi Arabia and India, and for its world-class chefs in Saudi Arabia, India, France and Russia.



DUBAI RANKING WITHIN THE GASTRONOMY PILLAR

	IND	AUS	RUS	BE	FR	KSA
Gastronomy Overall	4 th	5 th	2 nd	2 nd	5 th	1 st
Variety of Restaurants	4 th	5 th	2 nd	4 th	2 nd	4 th
Service of Restaurants	6 th	3 rd	3 rd	5 th	2 nd	3 rd
World Class Chefs	6 th	3 rd				
Authentic Regional Cuisine	4 th	5 th	6 th	7 th	6 th	3 rd
Fine Dining (Star Rated)	5 th	6 th	3 rd	4 th	5 th	4 th

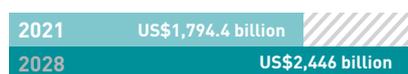
COMPARISON OF GLOBAL F&B AND LUXURY TRAVEL MARKETS

GLOBAL FOOD TOURISM MARKET (VALUE US\$)



17.4%
CAGR

GLOBAL LUXURY TRAVEL MARKET (COMPARISON PURPOSES)



5.3%
CAGR

NO.1 GLOBAL F&B INDUSTRY GROWTH DRIVER FOOD FESTIVALS (MARKET VALUE US\$)



17.2%
CAGR

UAE OVERVIEW AND INDUSTRY DYNAMICS

DUBAI: THE REGION'S FOOD SERVICE CAPITAL

Dubai continues to enhance its reputation as the GCC's leading F&B hub, with the greatest variety of food service categories and cuisines of any city in the MENA region

Dubai's reputation as the region's leading tourism and business destination and one of its fastest-growing cities is reflected in the diversity, quality and size of its gastronomy industry.

According to research commissioned by DET, Dubai ranks among the world's top gastronomy destinations in terms of service standards, the variety and quality of cuisine on offer and for its fine dining options.

The study, which surveyed 16,000+ respondents worldwide, concluded that Dubai ranked ahead of leading tourism peers Singapore and Istanbul for the variety of restaurants on offer, highlighting how the city's F&B offering has dramatically evolved in recent years to cater the diverse palates of its international visitors and foreign residents, that hail from more than 200 countries.

DET's study involving 1,731 respondents living in the Emirates showed that 55 per cent named Dubai as the world's leading gastronomy hub, ahead of New York City with 8 per cent and London with just 7 per cent.

These research outcomes are largely reflected across all food service categories. In terms of fine dining, for example, international respondents ranked Dubai on par with New York and ahead of Singapore, London, Istanbul and Thailand, backed by the city's growing reputation for attracting world class chefs - ahead of Singapore, London and Thailand; while its service standards, outranked all 5 cities (New York, Singapore, London, Istanbul and Thailand).

DUBAI INTERNATIONAL BRAND HEALTH PROGRAMME [H1 2022] SAMPLE BASE: 16000+

How strongly do you rate the Gastronomy offering for each destination?	DUBAI	NEW YORK	SINGAPORE	PARIS	LONDON	ISTANBUL
Gastronomy Overall	3 rd	2 nd	3 rd	1 st	6 th	5 th
World Class Chefs	2 nd	4 th	5 th	1 st	2 nd	6 th
Fine Dining	2 nd	5 th	4 th	1 st	3 rd	6 th
Service at Restaurants	2 nd	4 th	3 rd	1 st	4 th	6 th
Authentic Regional/Unique Cuisine/Restaurants	3 rd	4 th	2 nd	1 st	4 th	6 th
Variety of Restaurants	5 th	3 rd	4 th	1 st	2 nd	6 th

DINING SECTOR GROWTH

In casual dining, Dubai is spearheading the adoption of food hall concepts in the UAE and across the region, as evidenced by the popularity of venues such as the Time Out Market at Souk Al Bahar in Downtown Dubai.

While in the past, Dubai relied on imported food service concepts and international brands to develop its F&B scene, the number of homegrown brands operating in the city has exploded in recent years, with many today finding success in international markets.

High-profile homegrown brands such as Il Borro, Gaia and Asia Asia, are now being exported to global cities such as London and Moscow, boosting Dubai's reputation as a global F&B hub.

Dubai's development of grassroots talent is also paying dividends positioning it as a leading international gastronomic hub.

Homebred talents that are now exposing the Dubai brand globally include:

- Chef Akmal Anuar owner of one-MICHELIN-starred restaurant, 11Woodfire, who is set to open 53, an elevated Asian restaurant in New York City (USA) and Goldfish Sushi & Yakitori in Saudi Arabia in 2023;
- Chef Izu Ani, founder of GAIA, who is currently developing restaurants in Monaco, London and New York;
- Chef Reif Othman of Zuma and Reif Kushiyaki fame, who has opened restaurants under the latter brand in Saudi Arabia and Egypt to great success.

TOURISM IMPACT ON DUBAI F&B SECTOR

TOURISM GROWTH HELPS BOOST DUBAI'S REPUTATION AS GLOBAL GASTRONOMY HUB

Rising international visitation and a booming domestic tourism sector are both playing a key role in shaping Dubai's gastronomic scene

Dubai is once again demonstrating why it is one of the world's most popular tourism destinations in 2022, with the city welcoming 7.12 million international overnight visitors in the first half of the year, marking an impressive rise of 282 per cent year on year (YoY).

A shining light for the global tourism industry throughout the COVID-19 pandemic, Dubai's impressive tourism performance was testament to the implementation of a highly sophisticated, multidimensional strategy that showcased the city's reputation as one of the world's safest travel destinations.

The city's international standing was further enhanced when it was named the world's most popular destination by Tripadvisor in its 2022 Travellers' Choice Awards.

India has consolidated its position as Dubai's top international visitor source market in 2022, accounting for 858,000 visitors (+109 per cent YoY) or 11.8 per cent of the total figure of 7.12 million. Oman claimed second place overall with 787,000 visitors, representing an incredible 1,343 per cent increase compared to the same period in 2021.



The Kingdom of Saudi Arabia (KSA) ranked third, contributing 543,000 visitors, up an impressive 314 per cent year on year, while the United Kingdom followed closely with 506,000 visitors, marking a 782 per cent increase compared with H1, 2021. Russia rounded out the top five source markets with 309,000 visitors, up 47 per cent year on year.

Other notable entries in Dubai's list of top 10 source markets for the first half of 2022 included sixth-placed United States with 262,000 visitors (up 162 per cent YoY), France with 219,000 visitors (+135 per cent YoY), Germany with 215,000 visitors (+238 per cent YoY), Pakistan with 193,000 visitors (+205 per cent YoY) and Iran with 165,000 visitors (+427 per cent YoY).

The remarkable performance of Dubai's tourism industry in the first half of 2022 bodes well for the remainder of the year, as the city continues to spearhead the global tourism recovery in the post-pandemic context.

TOP 20 SOURCE MARKETS FOR VISITORS TO DUBAI ('000 Visitors Jan-June 2022/2021)

Performance of Top 10 Source Markets

	2022	2021	% Change
1 India	858	409	109%
2 Oman	787	55	1343%
3 KSA	543	131	314%
4 UK	506	57	782%
5 Russia	309	210	47%
6 USA	262	100	162%
7 France	219	94	135%
8 Germany	215	64	238%
9 Pakistan	193	63	205%
10 Iran	165	31	427%

Top 11-20 Source Markets

Rank	Country	2022	2021	% Change
11	Egypt	135	90	50%
12	Kuwait	122	18	583%
13	Italy	119	26	359%
14	Israel	114	34	238%
15	Kazakhstan	113	67	69%
16	Netherlands	86	27	222%
17	Australia	72	9	678%
18	Canada	71	21	243%
19	Sudan	70	54	30%
20	Nigeria	68	25	170%

RISE IN INTERNATIONAL VISITATION HELPS SHAPE GASTRONOMY SCENE

Dubai's reputation as one of the world's top travel destinations has had a major influence in shaping the city's culinary ecosystem.

A 2019 study by KPMG focusing on the world's top 10 most visited destinations, found that Dubai had more restaurants per head of population and international visitors than any other city, with the exception of Paris and London - reflecting a robustness and sustainability of demand that is only usually evidenced in much larger scale and older cities that have developed the industry ecosystem over several decades.

Meanwhile, in a recent industry analysis, JLL declared that Dubai had refined its F&B offering in

recent years to better cater to the diverse palates of international visitors to the city, alongside its foreign residents, that hail from more than 200 nationalities.

Dubai's dining scene has consequently become one of the world's most sophisticated and eclectic, with an array of innovative offerings spanning a range of experiences, budgets and audience preferences.

Its reputation in this respect is reflected across all food service categories. In terms of fine dining, for example, Dubai is home to 80 per cent of the 340 fine dining restaurants operating in the UAE's two largest cities (i.e. Dubai and Abu Dhabi). According to JLL's research, this is largely due to demand for fine dining options from international visitors to the city that also drive demand for casual dining and social - drinking options, underlining the expansive range and richness of brands offering such experiences across Dubai.

DUBAI TOURISM GROWTH

**7.12
MILLION**
(+282% YOY)

International overnight visitors reported in H1, 2022

**18.47
MILLION**
(+30% YOY)

Hotel room nights sold in the first half of 2022

74%
(+12 PPT.)

Average hotel occupancy rate in H1, 2022

LOCATION DEEP-DIVE

FOOD FOR THOUGHT

Dubai's rising status as a major global gastronomy hub is reflected in the overwhelmingly positive online feedback received from diners

Dubai's F&B sector resonates as strongly with audiences online, as revealed by a custom study of thousands of independent reviews posted on Zomato (India's largest dining and restaurant website) and Tripadvisor, the world's largest traveller reviews site, highlighting the overwhelmingly positive experience of those who have dined in the city.

The 2021 study, despite the pandemic constraints found, praise for the quality of Dubai's food offerings with more than 92.8 per cent being positive in general.

Reviewers also praised the overall quality of service in restaurants across the city, with 93.7 per cent of all reviews complimenting staff performance, and 90.6 per cent applauding overall standards of service.

Other top performing categories included the friendliness of staff, which attracted a positivity rate of 99.3 per cent; the quality of cuisine available (98.3 per cent positivity rate); restaurant facilities (98.5 per cent positivity rate); the dining experience (95.4 per cent); and the city's chefs (98.1 per cent positivity rate).

The performance of key neighbourhoods in the city was also analysed based on the number of reviews and sentiment of feedback provided.

The city's best performing areas in 2021 included Jumeirah, which attracted the majority of reviews with a net positivity rate of 95 per cent, up two points from 2020; Al Barsha with a positivity rate of 96 per cent (up one point from 2020); and Dubai Marina with a positivity rate of 94 per cent (up three points YoY).

Other top performers in 2021 included Dubai Festival City, Downtown Dubai and Deira City Centre, which together received a net positivity rate of 93 per cent respectively.

TRENDS OF POSITIVE REVIEW SENTIMENTS BY NEIGHBOURHOODS

TOP 10 NEIGHBOURHOOD BY REVIEW COUNT	SHARE OF POSITIVE REVIEWS		
	2021	2020	2019
Jumeirah	95%	93%	92%
Dubai Festival City	93%	91%	88%
Al Barsha	96%	95%	93%
Al Karama	89%	92%	89%
Oud Metha	88%	89%	83%
Dubai Marina	94%	91%	91%
Downtown Dubai	93%	93%	91%
Al Sufouh	88%	92%	90%
Mankhool	92%	89%	90%
Deira City Centre Area	93%	92%	90%

GASTRONOMY GUIDE

The city's neighbourhoods showcase its eclectic gastronomic scene, designed by the world, for the world

DOWNTOWN DUBAI

Downtown Dubai, is home to some of the city's best restaurants, cafe's and nightclubs. From the unique fine dining experience of At.mosphere - the world's highest restaurant located on the 122nd floor of the Burj Khalifa - to Ting Irie, the city's uniquely immersive Jamaican restaurant and lounge, the precinct has something for everyone. Other popular options include Asian fusion eatery Thiptara; and the legendary Italian seafood restaurant Bice Mare, that are an instagrammer's dream with their plates and their views offering a feast for all senses. To round off the global tour, Time Out Market Dubai features 17 food concepts developed by some of the city's best local restaurants and finest chefs all under one roof.

DUBAI MARINA

As one of Dubai's most popular residential communities, it is little surprise that Dubai Marina is home to a remarkably diverse selection of eateries, pubs, bars and food courts for all ages. One of the most popular destinations is Pier 7, which houses seven of the city's best restaurants, including the award-winning rooftop restaurant and bar, Atelier M, headed by renowned chef Mohammad Islam; The Scene, conceived by British celebrity chef Simon Rimmer; and the multi-award-winning Asia Asia. Other popular options include Marina Social from British MICHELIN-starred chef Jason Atherton; MasterChef the TV Experience - the world's first restaurant based on the MasterChef reality TV series; and the ever-popular restaurant-bars Barasti, Cargo and Drift Beach.

PALM JUMEIRAH

Dubai's world-famous man-made island houses some of the city's finest luxury resorts, which in turn boast some of the region's best restaurants. From Nobu and Gordon Ramsay's Bread Street Kitchen to SUSHISAMBA, Social by Heinz Beck and STAY by Yannick Alléno, now a Two MICHELIN-starred restaurant in the Dubai 2022 Selection. But it's not all high-end dining that defines the Palm Jumeirah experience. Beachside bars, restaurants and cafes are in abundance, with Club Vista Mare, West Palm Beach and new openings such as The Byron Bathers Club delivering consummate al fresco experiences. TRÈSIND STUDIO offers an immersive fine dining experience, challenging common perceptions of Indian cuisine and it is the only Indian MICHELIN-starred restaurant in UAE. Ossiano in Atlantis was awarded both a one MICHELIN star and Sommelier Award, offers a progressive fine dining experience inspired by the ocean and seas.

JUMEIRAH LAKES TOWERS

JLT is home to Bait Maryam, specialising in wholesome local fare and renowned as one of the city's best Levant-inspired restaurants with a MICHELIN Bib Gourmand. The Santorini-style Mythos is Greece on a platter, while Streetery Food Hall boasts some of Dubai's best Asian street food, with four unique brands to choose from. Other popular options include Shamiana – recognised among Dubai's best Indian restaurants; Lebanese-inspired French bistro Cougley; Creole-style eatery Nola; and Vietnamese Foodies that lives up to its name.

JUMEIRAH

Jumeirah boasts an eclectic dining scene, from speciality coffee to afternoon tea and MICHELIN-starred fine dining. The urban lifestyle destinations BoxPark and City Walk are home to dozens of yuppie and chic eateries, and the neighbourhood hosts some of the city's most innovative restaurants, including the multiple award winning Orfali Bros, and the urban Balkan bistro 21grams. Fine dining options include Japanese institution Mimi Kakushi, winner of Time Out Dubai's 2022 Restaurant of the Year award, and Peruvian favourite COYA, both at the Four Seasons Resort Dubai. Not to be missed is one of Dubai's most photographed waterfront restaurants – Pierchic the multi-award-winning Italian spot located on its own private pier overlooking the Arabian Gulf – or the MICHELIN-starred Al Muntaha, located in Dubai's most luxurious hotel, Burj Al Arab.

DIFC

The region's biggest financial precinct is complemented by the calibre of fine dining options available in this prestigious block. Famous high-end eateries include the acclaimed L'Atelier de Joël Robuchon, Zuma, LPM Dubai, Carnival by Trèsind,

and Bull and Bear – all of which stand up to the repute of their global parent or sister concerns.

KARAMA

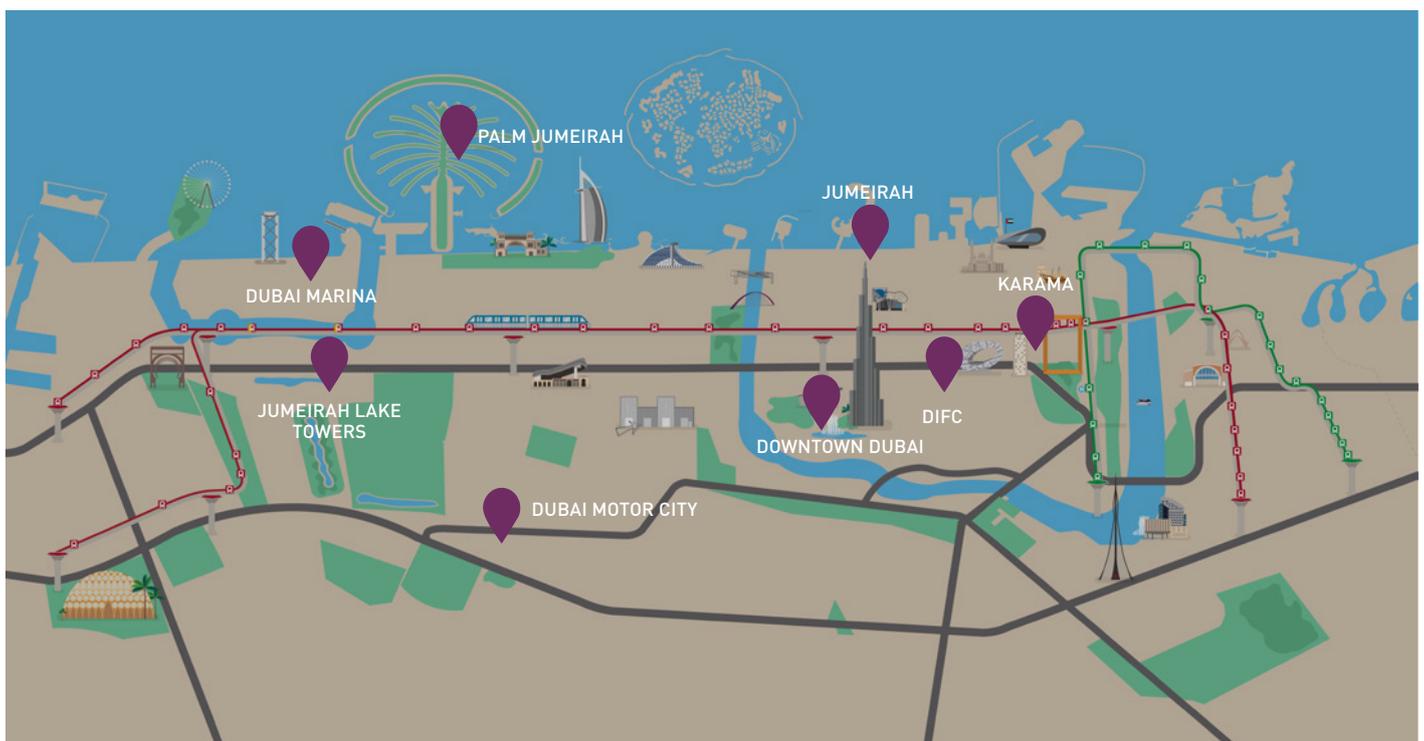
A must-visit destination for food lovers that crave the buzz of the street, the sights and wafting aroma of the spices - a showcase of new and old Dubai. From the street food-inspired SS Bucket Biryani, Little China, Amaravathi and Time Out Award-winning Indian favourite Calicut Paragon to fine dining institution Brasserie Boulud – by the one and only Daniel Boulud – Karama is one of Dubai's most eclectic dining destinations.

DUBAI MOTOR CITY

This popular and central expat neighbourhood in the heart of Dubailand boasts a mix of popular chain, standalone bakeries and neighbourhood food halls designed for all budgets. Homegrown favourites include Santorini-inspired SanSation, Lime Tree Café, Friends Avenue, and Cycle Hub. Neighbouring Arabian Ranches is home to the family friendly Ranches Restaurant, the modern European eatery Maison Mathis, and the Antipodean-themed sports bar and grill Nezesausi.

DUBAI STUDIO CITY

Another fast-growing area of New Dubai, DSC is home to a number of bars and clubs, tea-shops and cafeterias and popular all-day diners, including the modern Japanese favourite, Mr Miyagi's, seafood restaurant The MAINE Street Eatery, Mexican-inspired El Chapo's Tacos, and LARTE Italian Neighbourhood Bistro, all of which are located in the trendy boutique hotel, Studio One. The nearby Dubai Equestrian and Polo Club is also home to three popular venues: Sella, serving a range of international cuisine, the casual Dubai Polo Bar and the family friendly Splash Pool Bar.



DUBAI F&B: EXPERIENCE AND RECOGNITION

DUBAI'S DINE OUT GARNERS GLOBAL ATTENTION

Already recognised as the region's leading dining destination, new Dubai-wide initiatives are set to boost Dubai's global reputation as a major F&B hub

Reflecting its fast-rising global stature, Dubai was voted the world's fourth-best destination for food lovers in the latest Travellers' Choice Awards, judged by millions of Tripadvisor users worldwide.

Dubai is also the first city in the Middle East to boast its own prestigious MICHELIN guide, with the inaugural 2022 edition featuring 69 restaurants specialising in 21 different cuisines. Two fine dining institutions – Il Ristorante – Niko Romito, located in the Bulgari Resort Dubai, and STAY by Yannick Alléno, situated in One&Only The Palm, were both honoured with Two MICHELIN Stars, while nine others received One MICHELIN Star. A total of 14 others were awarded Bib Gourmand status, which recognises restaurants that provide a value-for-money gourmet experience for an average price of AED250 (US\$68) for a three-course meal.

Dubai also scored a number of MICHELIN Special Awards: the Young Chef Award went to Solemann Haddad of Moon Rise; Danijela Tesic of Ossiano took home the Sommelier Award; while the Welcome and Service Award was received by Chef Salam and her team at Bait Maryam.

Additionally, 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 recognised within the awards programme, 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.

GASTRONOMY ALWAYS ON: SUSTAINING MARKET GROWTH

DET 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.

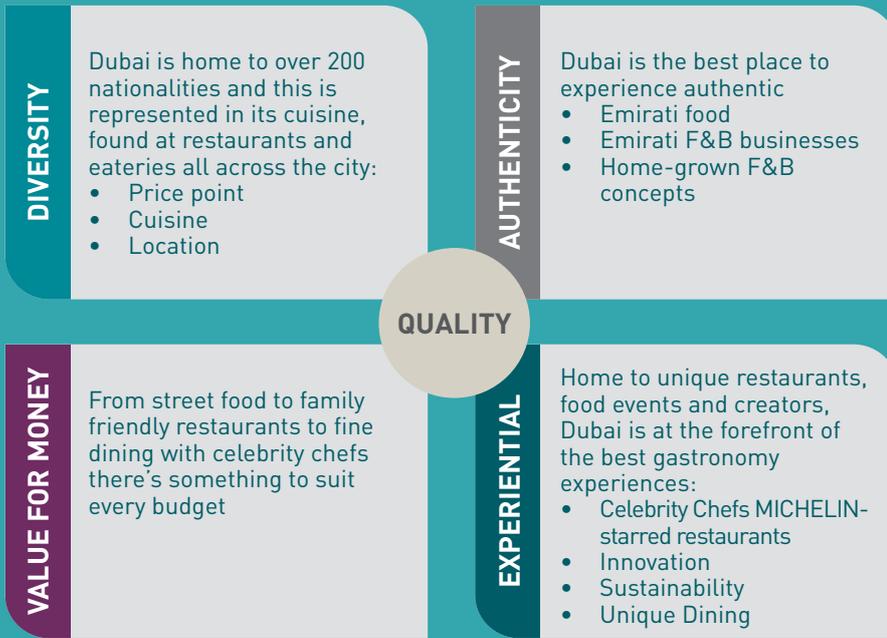
In 2022, DET launched its 'Gastronomy Always On' (GAON) strategy, which aims to support the F&B industry through the development of a year-round calendar of culinary events and programmes.

In addition to the hugely popular Dubai Food Festival (DFF), which includes the Dubai Restaurant Week, culinary promotions including Foodie Experiences, Made in Dubai, and Hidden Gems feature on the annual city calendar.

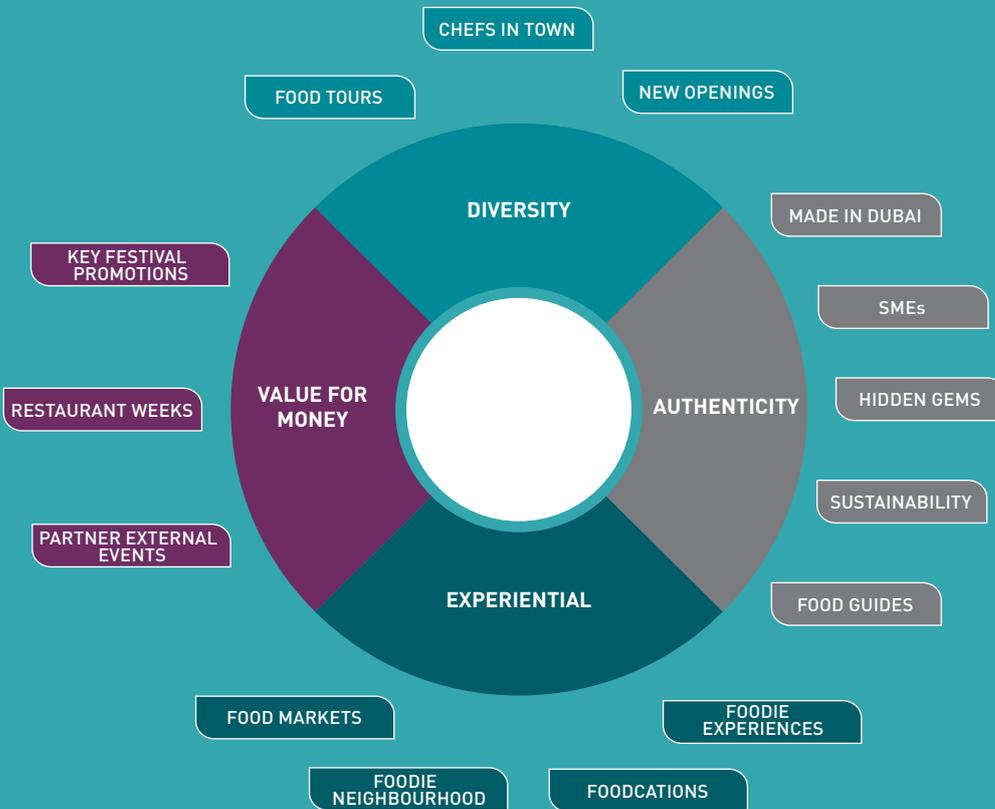
To further support these annual gastronomy events, major promotions and initiatives in conjunction with F&B industry stakeholders, including Chefs, restaurateurs, food tour operators, and other F&B SMEs are driven by the DET's dedicated gastronomy team year-round. New gastronomy promotions, activities and events are designed to reflect the four main gastronomy pillars of diversity, authenticity, value for money and experiential dining.



GASTRONOMY PILLARS



DUBAI GASTRONOMY'S ANNUAL FOCUS - KEY CONCEPTS



KEY ANNUAL GASTRO FOCUS AREAS

CHEFS IN TOWN (LOCAL & INTERNATIONAL)



- Showcasing Dubai's Exceptional Restaurants owned by the world's top chefs
- Creating unique collab content and activations with chefs when in town (international & local content)
- Profile unique and inspiring local talent, including chefs and restaurateurs

NEW OPENINGS / NEWS



- Highlighting all key monthly new openings across key platforms where possible
- Additional collab opportunities as relevant
- Showcase all new restaurant openings and F&B product launches in Dubai. Distribute news alerts in key markets

HIDDEN GEMS



- To support and build awareness of Dubai Hidden Gems
- Support and develop Dubai F&B advocates to promote Dubai's Hidden Gems
- Hidden Gem Definition
 1. Outstanding Offering
 2. Unknown/Not in mainstream media

MADE IN DUBAI



- Supporting and raising international awareness and highlighting homegrown Dubai-based entrepreneurs and F&B brands / restaurants in the city
- Example:
 - Highlighting the success stories of Dubai-based F&B entrepreneurs
 - Emirati-owned businesses
 - Innovative and exceptional local restaurants

FOOD GUIDES & NEIGHBOURHOODS



- Develop new and comprehensive food guides for both local and international audiences
- To showcase and build awareness of all the gastronomic offerings across cuisines, experiences, locations and price points
- Aim to also build awareness of key foodie neighbourhoods

SME SUPPORT



- Develop Gastronomy SME support promotional platforms
- Potential SME development and support initiatives

FOODIE MARKETS



- Help drive footfall to existing and up-and-coming food markets across the city

FOOD TOURS



- Support the development of existing and up-and-coming gastronomy tours showcasing Dubai's eclectic dining scene to international visitors to the city, while building loyalty among local residents
- Increase promotional support to all operators in this sector

GASTRONOMY CALENDAR

MAJOR EVENTS BOOST DUBAI'S GASTRONOMIC APPEAL

To consolidate Dubai's reputation as a global gastronomy capital, DET rolls out a year-round calendar of major F&B events to attract food lovers to the city

Pivoting off the standalone Dubai Food Festival, which has earned a reputation as one of the world's biggest annual events of its type, an annual calendar of gastronomy events and activations has been developed, ensuring that the city's F&B offering becomes a key element of the city's biggest annual festivals, cultural, retail and religious events.

In 2022, the schedule commenced with Iftar and Suhoor promotions coinciding with Ramadan in April and continued with traditional Eid Al Fitr

initiatives in May. Both attracted the support of industry stakeholders, namely restaurateurs in key locations across the city.

In summer 2022, the annual Dubai Summer Surprises retail initiative featured a series of family-focused gastronomy events and promotions, headlined by Summer Restaurant Week in August, involving 50 of the city's best premium casual restaurants.

Major citywide gastronomy initiatives are also planned to coincide with Diwali, the Indian festival of lights, in October, and the Dubai Fitness Challenge in November, with the latter involving the city's rapidly growing collection of organic and health food restaurants and cafes.

A series of gastronomy-related events and promotions are planned to coincide with UAE National Day on December 2 and Dubai Shopping Festival (DSF), which kicks off on December 15 this year.

DET will seek to partner with F&B stakeholders across the entire value-chain throughout these major annual events, ensuring all F&B promotions align with the key areas of focus and festival event objectives. It will also provide marketing support which will be amplified via the DET's dedicated @DubaiEats social media handle and other DET marketing channels and platforms where possible.

DUBAI FOOD FESTIVAL

2022 PROMISES TO BE BIGGER AND BETTER

The annual DFF continues to consolidate its reputation as one of the world's largest citywide culinary extravaganzas

DFF has quickly grown to become one of the biggest and most-popular culinary festivals, with the 14-day event showcasing global gastronomy in one city.

In recent years, the festival has dramatically scaled, providing residents and visitors new and innovative ways of experiencing the very best dining experiences on offer.

The 2022 event, staged in May and coinciding 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 casual dining outlet Reif Kushiya provided exclusive Chefs Table experiences as part of the initiative.

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

MARKET OUTREACH

SHOWCASING DUBAI'S DINING SCENE TO THE WORLD

Deep outreach efforts in key source markets are helping shape Dubai's long-term gastronomy strategy

DET's series of gastronomy workshops in key tourism source markets covered GCC, Egypt, the United Kingdom, India, France and Germany to understand market perception and areas of improvement.

In terms of strengths, survey respondents across all markets agreed that Dubai offered a huge diversity of dining options, from affordable casual venues to fine dining restaurants.

French travellers in particular praised the fine dining scene, ranking the city third worldwide in this category, and compliments the significant number of world-class chefs working in the city.

Indian travellers were particularly impressed with the number of budget-friendly, high-quality Indian restaurants in Dubai, as well the quality of authentic Arab and Emirati cuisine on offer, while British travellers valued the overall quality of the city's F&B options as well as its al fresco dining scene.

On the flip-side, price was perceived to be a barrier, despite the increasing availability of quality budget and mid-range dining options. However, many respondents revealed they would be happy to stretch their budgets for the exceptional dining experiences in the city.



RESIDENTS HAIL DUBAI AS WORLD'S #1 GASTRONOMY HUB

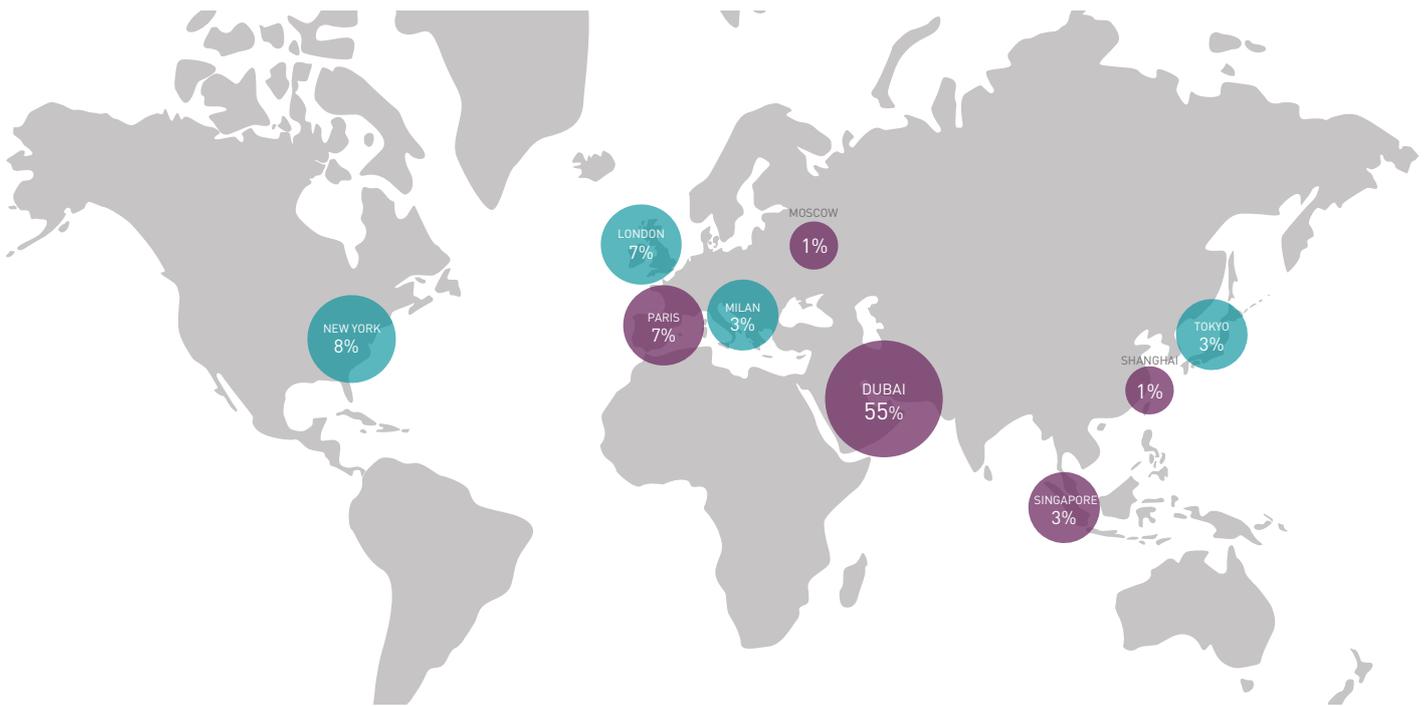
In 2022, the 1,731 UAE residents surveyed as part of the gastronomy sentiment research revealed a number of landmark findings, 55 per cent of respondents ranked Dubai as the world's leading gastronomy hub, ahead of second-placed New York with 8 per cent and London with 7 per cent.

Rounding out the top five were Paris with 7 per cent and Tokyo and Milan each at 3 per cent.

Adding weight to the findings was the fact that 46 per cent of all respondents described themselves as consummate food lovers, while the majority (52 per cent) revealed that they dined out up to three times a week.

This DET study is designed to feed into Dubai's broader GAON strategy designed to establish the city as one of the world's top food tourism destinations.

WHICH CITY IS THE WORLD'S LEADING GASTRONOMY HUB?



INTERNATIONAL VISITORS PRAISE DUBAI'S DINING SCENE

International visitors to Dubai continue to express overwhelmingly positive sentiment towards the city's gastronomy sector, praising the overall quality and diversity of cuisine and restaurant experiences.

As part of DET's annual Dubai International Visitors Survey (DIVS), of the almost 32,000 visitors surveyed in 2021, 72.2 per cent said they were happy with the overall quality of food and restaurants, compared to just 0.1 per cent who said they were unhappy with their experience, leading to a net satisfaction score (NSS) of 72.2 per cent.

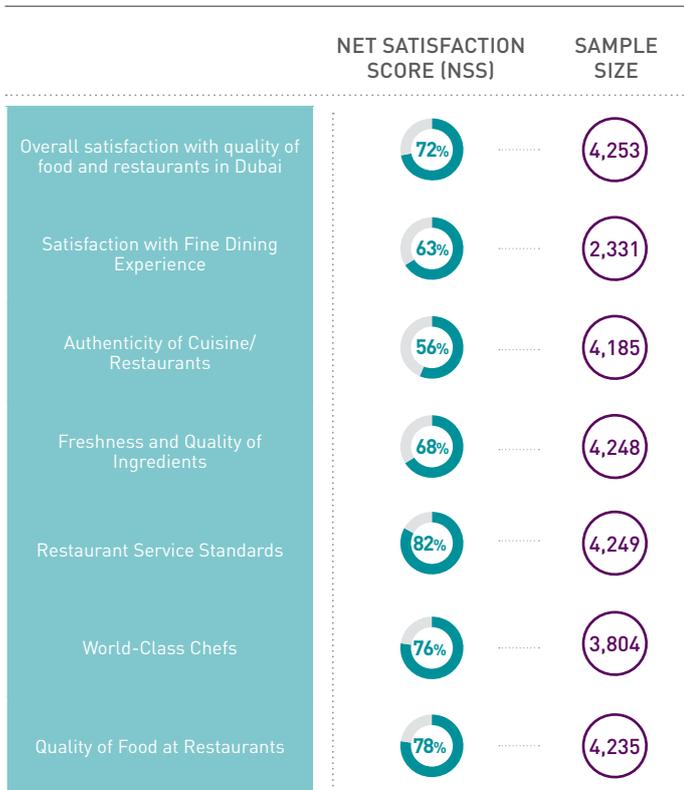
Furthermore, Dubai's fine dining sector received a strong NSS of 62.7 per cent, while the variety of restaurants and price points available in the city earned a strong NSS of 64.2 per cent. The city's F&B service standards received a NSS of 73.8 per cent, while the perceived quality of food on offer earned a NSS of 78.1 per cent.

These impressive results further highlight Dubai's rising reputation for excellence among visiting food lovers, and trigger advocacy for the city's gastronomic scene in their



KEY TAKEAWAYS FROM DUBAI INTERNATIONAL VISITOR SURVEY – GASTRONOMY PULSE

Survey Respondents from 34 key visitor source markets



INTERNATIONAL MARKETING

Successful digital campaigns promoting Dubai's thriving gastronomic scene-enhancing international profile

Social media with handle, @DubaiEats, has spearheaded this strategy, boosting engagement with thousands of social media users across across Twitter and Meta platforms.

Dubai Eats' Facebook account, which boasts 237,844 followers, is currently its biggest platform in terms of social engagement, followed by Instagram, which has 110,000 followers and Twitter with almost 32,000 followers.

All three platforms promote Dubai's dining scene to food lovers, with a key focus on upcoming F&B events, promotions, competitions, polls, restaurant profiles, and neighbourhood dining spotlights.

Looking ahead, Dubai Eats will play a major role in promoting DET's GAON strategy to international audiences, helping consolidate Dubai's reputation as a major international gastronomy hub and food tourism destination.



HIDDEN GEMS SHOWCASES NEW FINDS

DET's Hidden Gems initiative has proven a major hit with food lovers keen to head off the beaten track to discover some of the city's finest, not as publicised dining treasures.

With restaurant reviews and profiles, eclectic food tour itineraries, and video presentations from renowned American food blogger and YouTuber Mark Wiens, the Hidden Gems website turns the spotlight on some of the Dubai's finest neighbourhood eateries, which specialise in authentic, wholesome cuisine from around the world.

During the 2021 Dubai Food Festival, diners were encouraged to become advocates of their favourite Hidden Gem eateries by entering the My Hidden Gems competition. The initiative resulted in more than 300 Hidden Gem restaurants across the city being highly recommended by local residents.

NEW LOOK AND FEEL: GASTRONOMY WEBSITE GETS A REFRESH

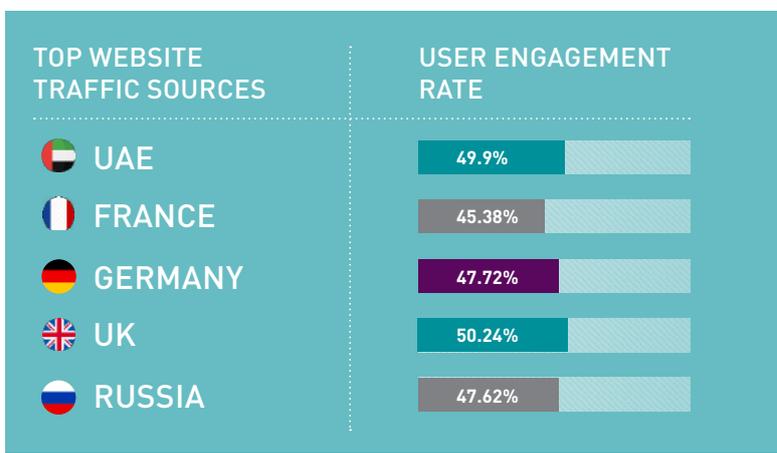
DET's online portal has seen a spike in visitor traffic and engagement following its revamp

The 2021 restructure of the website brought together all of the DET's existing F&B-focused online assets under one portal, making it easier for visitors to access content and gain a greater understanding of Dubai's F&B offerings.

New and engaging content, including 'Best Of' guides, curated videos, restaurant listings and reviews, points of interest, promotional deals and offers and food tourism itineraries, have all been added to the site over the past 18 months, driving visitation and promoting user engagement.

This mammoth increase in available content led to a massive rise in visitor traffic over the first half of 2022. The number of unique sessions rose to to 679K, a 200 per cent increase compared to the same period last year, while the number of unique page views increased 144 per cent over the same period last year crossing 1 million.

The dedicated website's user engagement rate increased by 6 per cent from the same period last year to 48.62 per cent, while users spent an average of 1 minute 50 seconds on the site. Organic traffic also accounted for an impressive 77 per cent of all traffic to the site during first half 2022.



TOP 10 MOST-READ ARTICLES (2022)	TOP 10 PERFORMING DINING EXPERIENCES (2022)
New restaurants to try	Sonara Camp
Dining in Dubai Mall	Nusr-et
Best iftars in Dubai	Time Out Market
Best rooftop lounges	Dinner in the Sky
World's 50 Best Mena restaurant winners	At.mosphere
Dubai's best breakfast spots	Pier 7
Best cakes in Dubai	Bubbalicious
Vegetarian restaurants to try	11 Woodfire
Dubai's best brunches	Salt
Instagrammable cafes	Summersalt Beach Club



FUTURE OUTLOOK

LOOKING AHEAD

Voice of the market through the lens of the industry

The resilience demonstrated by Dubai hospitality industry during the COVID-19 pandemic and the sector's successful recovery in 2022, demonstrates its fundamental strengths in the face of adversity.

These attributes, alongside the sector's growing international reputation, means it is ideally placed to spearhead the development of new and exciting F&B offerings, helping shape global trends while consolidating its position as a major gastronomic destination.

"This very first Dubai selection of restaurants marks a historical moment for the MICHELIN Guide and the Middle East," says Gwendal Poullennec, International Director of the MICHELIN Guide. "What makes Dubai's culinary landscape so distinctive is its reflection of the more than 200 nationalities that call the city home, delivering an epicurean kaleidoscope. One thing all the restaurants in this fast paced dynamic and elegant city have in common is they are brimming with passion and enthusiasm. Today, Dubai is settled as an inspiring gastronomic destination and we have no doubts that gourmets from all over the world will be seduced by its very unique energy."

"The Dubai restaurant scene has finally matured with homegrown, independent and chef-led restaurants overriding imported concepts – all thanks to the pandemic's support local movement," says Samantha Wood, founder of restaurant review website FooDiva.net, and curator of dining experiences.

"(The success of) one-off exclusive dining experiences, pop-ups and other unique initiatives speak to the [city's] pent-up demand for socialising and experiential dining," she adds.

"Value for money has become a crucial factor when selecting where to dine out. Looking ahead, the arrival of various international restaurant guides and lists will put the pressure on three aspects – an elevated food experience with the rise of tasting menus and more creative cooking; delivering more consistency; and out-of-the-box F&B activations."

LOCAL BRANDS MAKING AN INTERNATIONAL IMPACT

For Samer S. Hamadeh, founder of Aegis Hospitality, the rise and rise of local F&B brands has had the greatest impact on shaping the industry's future. "The culture of importing (F&B brands) is slowly being replaced by the culture of creating and I see many brands, not just mine, that have the potential to go global," he says.



"Dubai restaurateurs were among the toughest on the planet during the pandemic; while other cities were shutting down and quite literally embracing an 'end of the world' narrative, our industry doubled down on developing new concepts in Dubai – so I see that coming into fruition over the next year with some amazing new homegrown brands coming into existence.

"I also see delivery-only brands coming out of cloud kitchens after realising that customers want 'experiences' not just convenience, so I expect more food hall-style concepts that combine delivery with dine-in; and finally, a lot more sustainability-led design and execution."

GREEN LIES AT THE HEART OF OUR FOOD FUTURE

An industry-wide commitment to embracing sustainable practices is shaping the sector's future and is in line with broader consumer demand for eco-friendly options.

"Sustainability is top of mind for today's guests and is becoming increasingly important," says Emma Banks, Vice President, F&B Strategy & Development, Hilton, EMEA. "I believe that sustainable dining will be a key talking point this year, which I hope will advance the conversation about the ways we can all work towards reducing food waste and sourcing more local produce to cut our sector's carbon footprint."

Banks' thoughts are mirrored by Akmal Anuar, Chef Proprietor, White Rice Consultancy. "Responsibility toward the planet, sustainability and [reducing] waste is important. All my restaurants now use compostable takeaway ware and we believe in using every part of our fresh produce to achieve as little waste as possible. Small steps count but this eventually adds up."

NEW TRENDS RESHAPING THE INDUSTRY FOR THE LONG-TERM

Looking ahead, acclaimed chef Reif Othman of Zuma and Reif Kushiyaki fame, and founder and owner of Hotaru Holdings, “sees four key dining trends emerging in Dubai – the rise of beach clubs with in-house restaurants bringing coastal dining to the fore, and more food hall-type concepts. In terms of cuisine categories, I am often approached to consult on pizza concepts, and contemporary Chinese. With the latter, there’s definitely a market gap here.

“Looking ahead, with the MICHELIN Guide’s arrival and its fervent focus on food, we will see a return to fine dining and tasting menu concepts, as well as smaller, independent chef-led establishments. The broader Asian cuisine category will always be popular, however, over the next year, Korean restaurants in particular, will increase their market share,” he adds.

FOOD SECURITY ANCHORS SOURCING PRIORITIES

Sustainable farming is gathering pace in Dubai. With a large focus on food security and regenerative farming practices, Dubai’s agricultural sector continues to grow with a record number of ecological farms opening in the emirate.

Supporting the UAE’s food security goals, vertical farms are having a major impact on local fresh food supplies. Today, local produce is served at thousands of restaurants across the city, including all eight of Atlantis, The Palm’s restaurants, while local favourites The Pangolin, The Locale at Andaz Dubai and have committed to sourcing locally grown produce.

More broadly, initiatives such as Dubai Can, which aims to reduce single-use plastic water bottle waste by encouraging individuals to use refillable water bottles, provide access to free water stations across the city and drive awareness on plastic alternatives and sustainability issues, has been wholeheartedly embraced by the community, while F&B vendors are being actively encouraged to responsibly recycle food waste and materials.

A number of restaurants in the city are leading the charge by embracing sustainable practices and setting the benchmark for other stakeholders to follow.

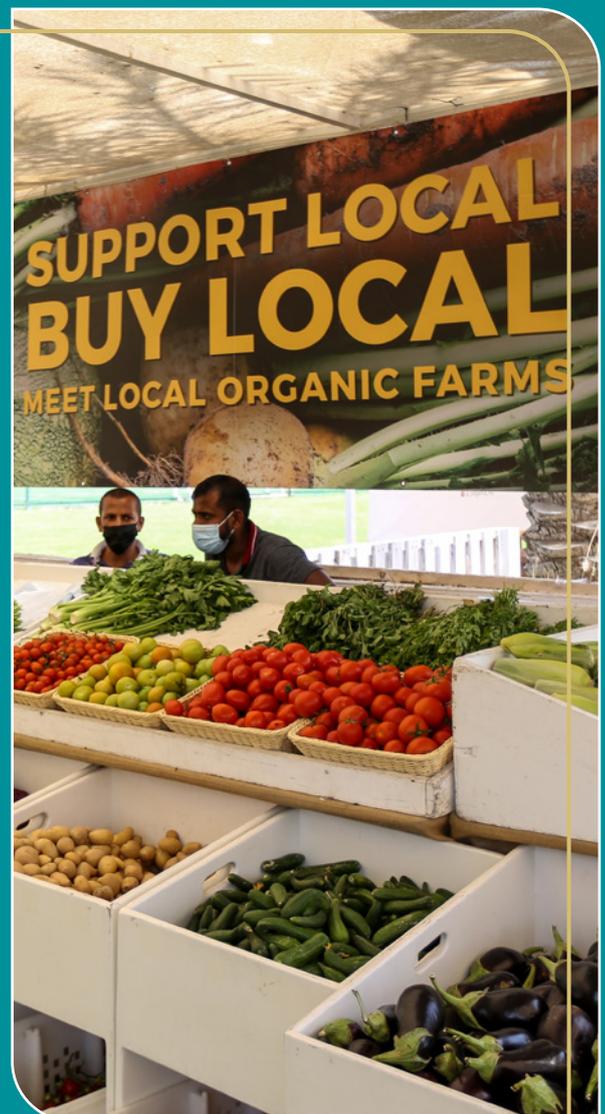
Lowe, is the first and only restaurant in Dubai to receive a MICHELIN Green Star and was named Sustainable Restaurant of the Year at the MENA 50 Best Restaurant Awards of 2022. Lowe is renowned for its commitment to sourcing local produce and eco-friendly packaging. Staged as part of the 2022 Dubai Food Festival, Lowe’s ‘Waste NOT’ dinner series featured a multi-course menu from would-be food scraps.

Boca, in DIFC, employs a waste officer who is responsible for auditing the restaurant’s kitchen operations to minimise wastage. Boca is also just one of a number of restaurants including **Hapi** in Al Satwa that regularly hosts zero-waste dinners and has published a guide on sourcing Emirati produce.

Cassette, in Al Quoz, sources directly from local suppliers where possible and uses offcuts for soups, sauces and syrups to minimise wastage. It also supplies takeaway containers that are made of 80 per cent recyclable Bagasse, and cassava-made straws and cups are entirely biodegradable.

The industry’s embrace of eco-friendly initiatives aims to not only meet consumer demand for greener F&B options, but reflects Dubai’s broader shift towards sustainability, as reflected by DET’s Dubai Sustainable Tourism Initiative, which has been developed to make sustainability an intrinsic component of the hospitality and tourism industry in the Emirate.

The initiative aims to promote energy and water conservation measures through the installation of efficient appliances and reinforce sustainable waste management practices while encouraging responsible purchasing and resources management.





across key tourist catchments across the city. Locations include airports and tourist attraction zones (e.g. malls, entertainment areas, in-city leisure attractions etc.). Respondents are qualified based on their status as an international visitor and based on the amount of time they have spent in Dubai. Qualified respondents must be leaving Dubai in 24 hours' time to screen-in for the survey; this is to ensure visitors maximum time spent in Dubai and sufficient representation of their full experiences in the emirate.

Respondents are selected following a quota sampling method: monthly quotas are applied to ensure an adequate representation of International Visitors to Dubai in the sample. The data collected is weighted by nationality on a monthly basis to ensure that the profile of visitors surveyed resembles the distribution of visitor arrivals in Dubai.

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

Respondents are grouped as follows:

- Advocates/Happy (score 9-10)
- Passive/Meet Expectations (score 7-8)
- Detractors/Unhappy (score 1-6)

DUBAI BRAND HEALTH TRACKER (BHT)

DET routinely pulse-checks the strength of the city brand as a holiday destination of choice within each key source market vis-à-vis top-tier global peers. Online interviews are conducted via panel in key source markets and emerging potential markets for Dubai to check the current imagery of Dubai among potential travel candidates, their motivations and barriers if any to travel to the emirate. The survey is currently run twice a year with 23 markets at covering 16,000 respondents in its last run in H1-2022. Qualifying respondents for the 20-minute survey need to be at least 18 years, have flown an international trip by air in the last 36 months, have a say in the decision making while selecting a holiday destination and been residing in the country for at least two years.

GASTRONOMY ALWAYS ON STUDY

This research study aimed at investigating the behaviour, attitude, preferences and demand of UAE residents with regards to Dubai's gastronomic offerings. The research consists of a total of ~3000 interviews across two waves in early 2022. Interviews were carried out with CAPI (Computer Aided Personal Interview) technique using tablets. The fieldwork activity was carried out across key multiple locations in Dubai (Deira City Centre, Dubai Mall, and Mall of the Emirates); the shared data collection on these sections are reflective of the fieldwork conducted in early 2022.

REPORT METHODOLOGY

DUBAI DINING EXPERIENCE (ONLINE REVIEWS)

User generated content is a growing form of content creation with online reviews being on top of that list. Reviewers love to express their dining or delivery experience and pass recommendations to fellow food lovers. Collectively, those reviews form an "insights rig" being in text format, which requires the tools and technology to extract it out and draw what refer to as Dubai Dining Experience.

Based on our expertise in tourism analytics, DET leveraged cutting edge deep learning to zoom into specific granular topics and the sentiment they were expressed by to structure this content into a visually meaningful report. Those 35 topics fall under 5 categories: Food & Drinks, Dining Experience, Services, Value for Money, and General Satisfaction & Recommendations. With this technology we achieve an impressive 90 per cent accuracy in extracting insights from reviews which is on-par to what a domain expert can achieve in analyzing this data, except 1000X faster with the power of modern computing.

DUBAI INTERNATIONAL VISITORS SURVEY (DIVS)

Most visitor descriptives in this report come from Dubai International Visitors Survey (DIVS) which is an ongoing survey that covers a sample of approximately 60,000 visitors a year, to analyse changes in traveller profiles and behaviours that impact levels of destination affinity, brand perception, and economic contribution of international tourists in Dubai. DIVS is a 20-minute, face-to-face digital survey, administered routinely,



CLOSING COMMENTS

Dubai's inherent personality as one of the world's most popular tourism destinations and multicultural cities has helped create a dynamic and thriving culinary experience unlike any other on the planet.

The sheer diversity of cuisine on offer reflects the city's status as one of the world's great cultural melting pots, with more than 200 nationalities living together in harmony.

The city's 13,000 F&B outlets span MICHELIN-starred fine dining restaurants - catering to a range of budgets and audience preferences.

With gastronomy a key pillar of Dubai's long-term tourism growth strategy, government authorities are investing billions to promoting the sector to new international audiences, positioning the city as a major food tourism destination on the global culinary map in line with the goal of the visionary leadership to make Dubai the best city in the world to visit, live and work in.

DET is building world-class infrastructure designed to sustain the growth of the city's gastronomy sector while partnering with industry stakeholders to promote its status worldwide.

This is great news for all those who have played a vital role in spearheading the industry's journey and will continue to help shape its future success.