

Expo 2020 Visitor Overview Report

Prepared for Expo 2020 International Participants

April 2019



EXPO
2020
DUBAI
UAE



Bureau
International
des Expositions

Disclaimer

All numbers in this presentation are to be considered estimates based on current behaviours and available data. Estimates may change as we approach the event due to a number of factors including evolving external market conditions.

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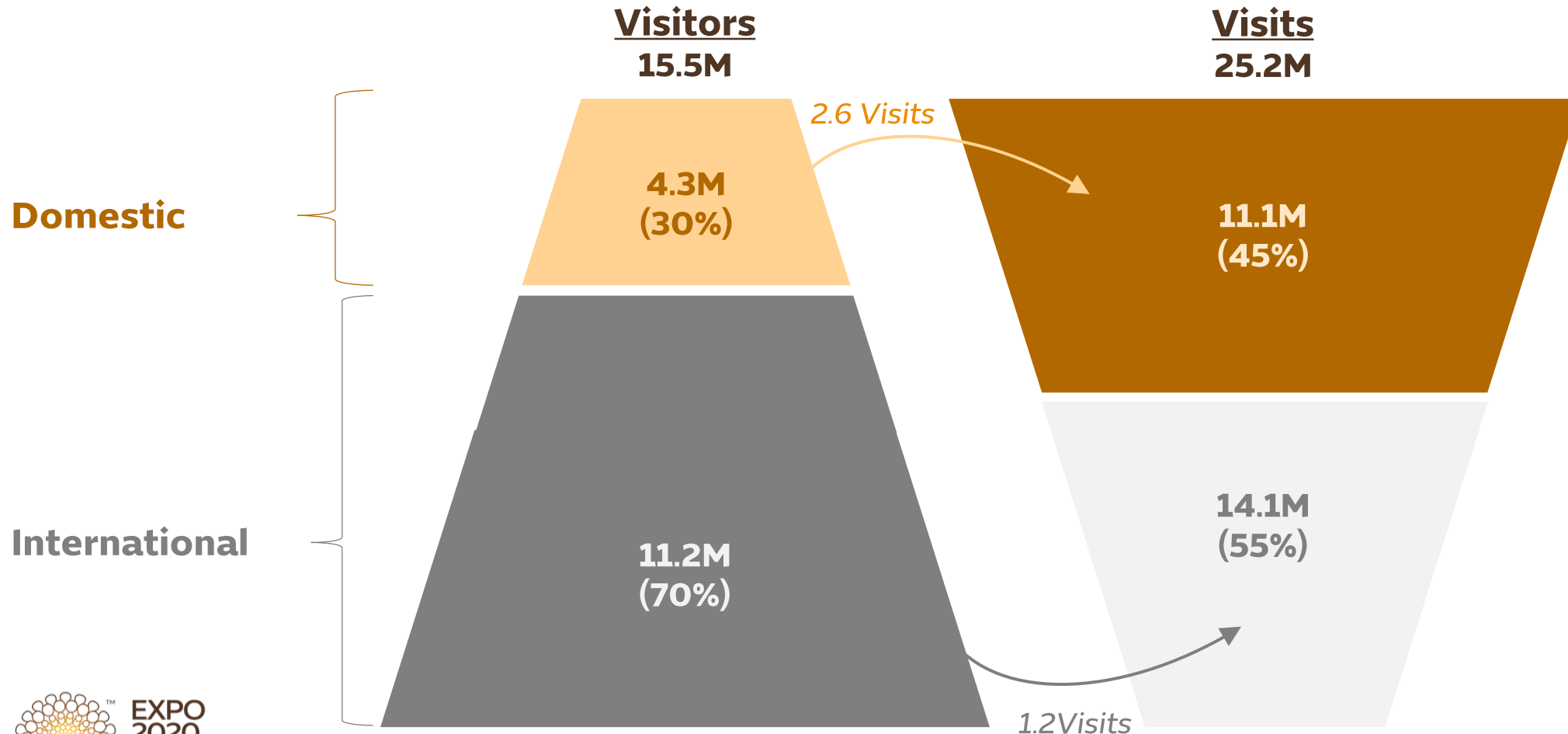
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Expo 2020 Visitor Overview



Expo 2020 Visitation Overview

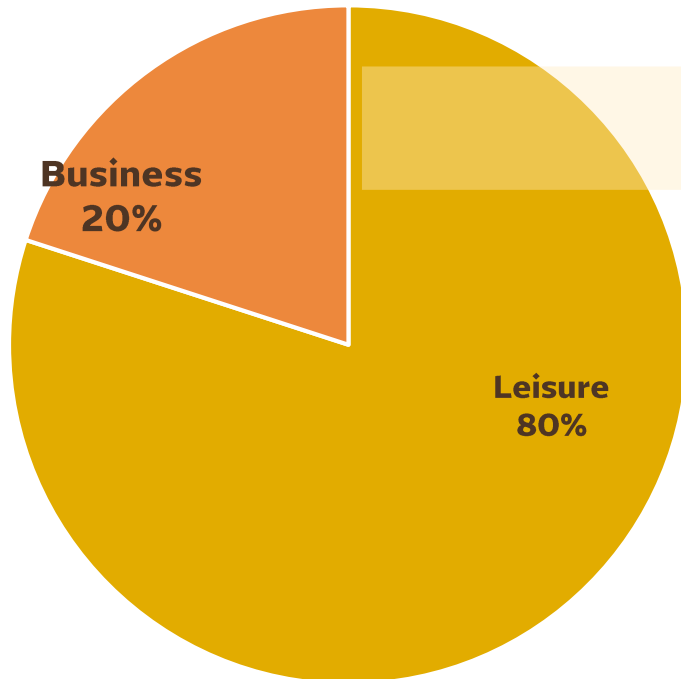
Expo 2020 is expecting 15.5 M Visitors and 25.2 M visits over the 6 month period:



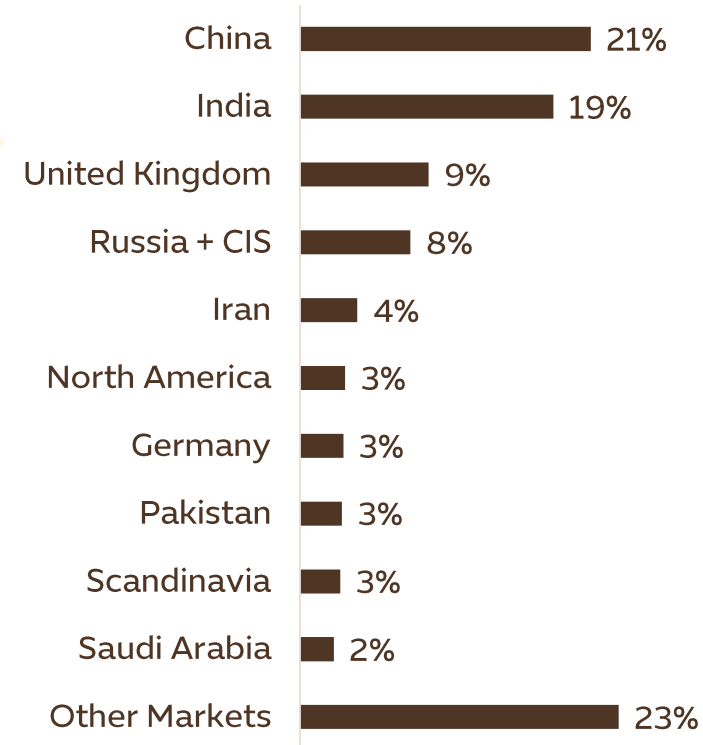
Visitor Breakdown

Business visitors are anticipated to contribute 20% of total visitation. China and India are anticipated to provide the largest number of business visitors to Expo 2020.

Expo Visitor Breakdown



Business Travelers - Top Source Markets*



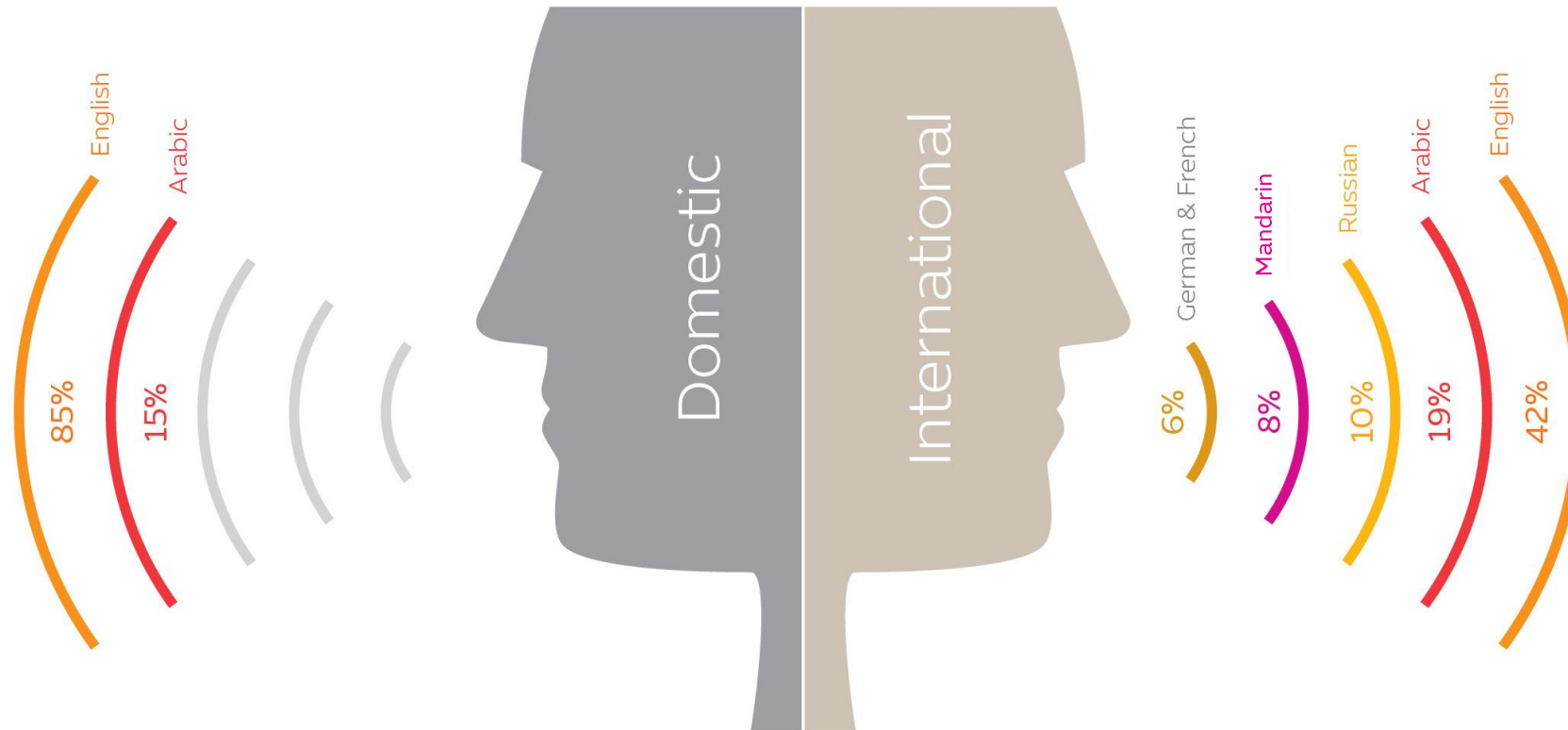
Expo 2020 Leisure Visitors Segmentation

Visitors were segmented in a manner that corresponds to the Expo proposition:



Language

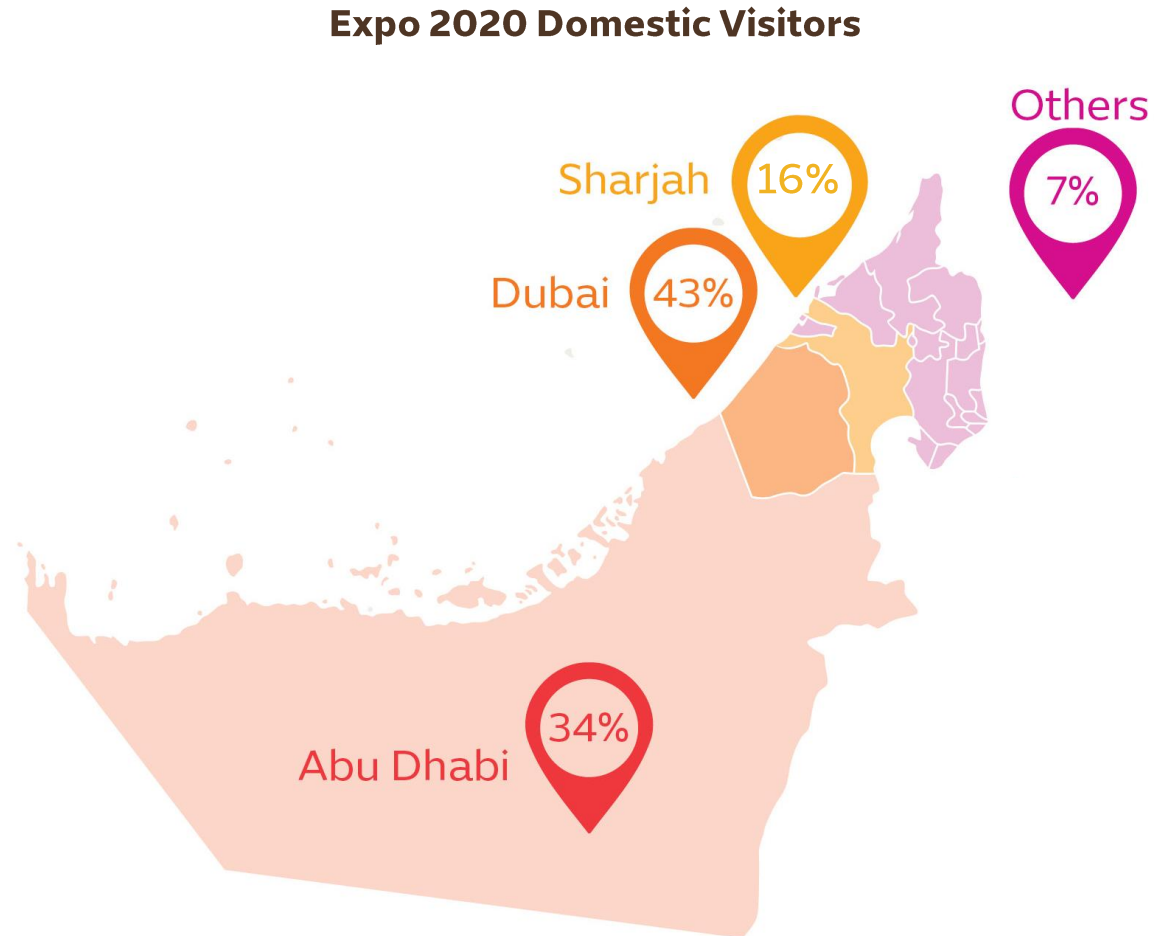
Communicating with visitors in English, Arabic, Mandarin, Russian, German and French allows us to engage with Domestic visitors and 85% of International visitors.



Domestic (UAE) Visitation

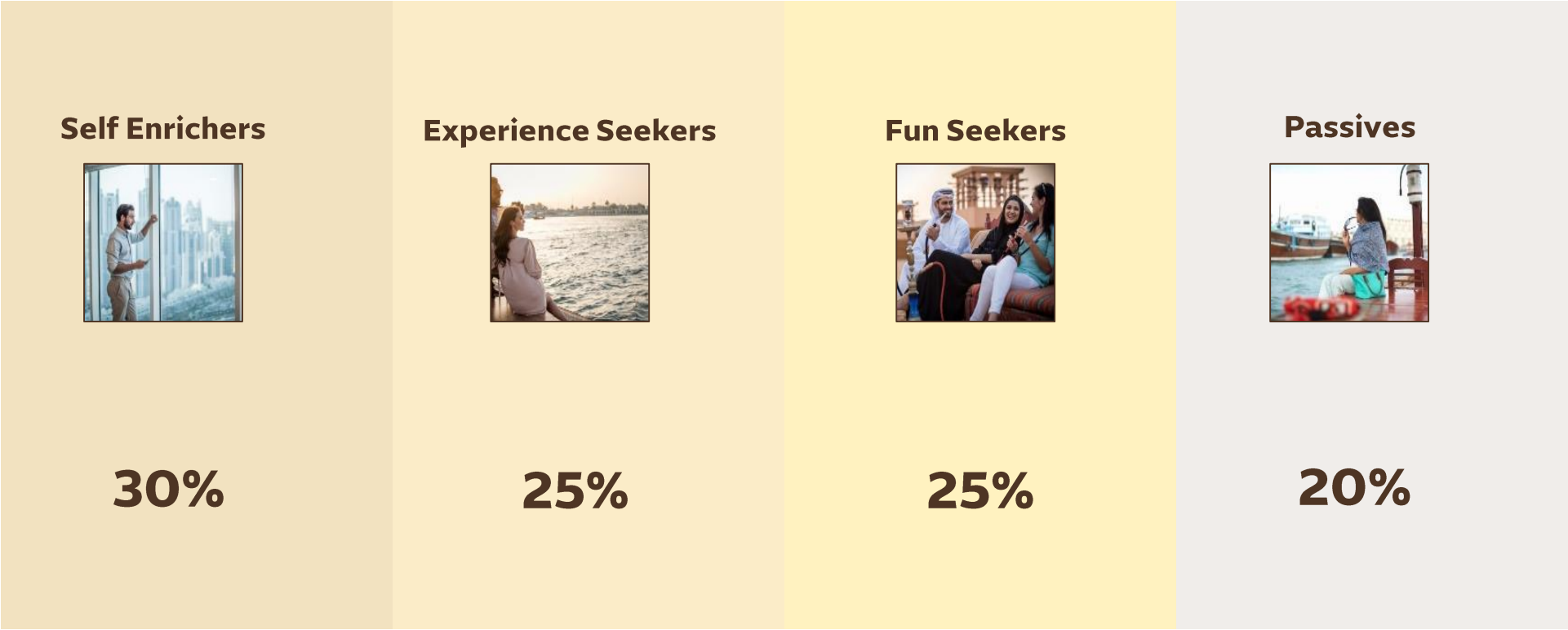
Domestic Visitors

Anticipated Domestic Visitors – by Emirate



Domestic Adult Leisure Visitors:

Visits, by Segment



Domestic Adult Leisure Visitors:

Attitudes

Demographics

Targeting Channels



Self Enrichers



Self enrichers are individuals who **enjoy learning and aspire to succeed**. They tend to get excited when something is new or different, and are **rooted in their values**. Also, they enjoy supporting others whenever they can.

Arab Expats with an income between AED 5,000 to AED 10,000, and residents of Abu Dhabi and Dubai are strongly represented in this group.

Aside from digital media, Self Enrichers can also be targeted through traditional media such as TV, newspapers and radio.

Experience Seekers



Experience seekers **value entertainment as well as culture & learning**. They like to help others whenever they can. They are advocates of the environment and tend to support this cause when possible.

This segment over indexes on Emiratis & Westerners, Abu Dhabi residents, and individuals with income exceeding AED 10,000/month.

They can be reached through advertising on TV in the morning and evening times, the radio from 10 am - 1pm, YouTube, and other digital and social media channels.

Fun Seekers



Fun seekers **enjoy every moment and make the most of it**. They're open to exploring the 'other', enjoy learning about the world and technology. They are comfortable communicating with brands via WhatsApp and Facebook.

This segment over indexes on Dubai residents from all ethnicities except low income Asians.

Fun Seekers can be reached through digital and social media. They show the highest use of Video on Demand, and are most likely to use Apps for events – mainly for navigation.

Passives



Passives tend to be disengaged and demonstrate a lower interest in culture and entertainment. They are economical and **careful in how they spend their money**, but **aspire to own material possessions**.

This segment consists of two sub-groups, Asian Expats earning a monthly income less than AED 5,000, and residents earning above AED 5000 and residing outside Dubai.

Passives can be reached primarily via advertising on TV and in Print, and under-index on online media channels compared to others.





Domestic Adult Leisure Visitors:

Response to Expo 2020

Visit Potential

Relevant Content & Positioning

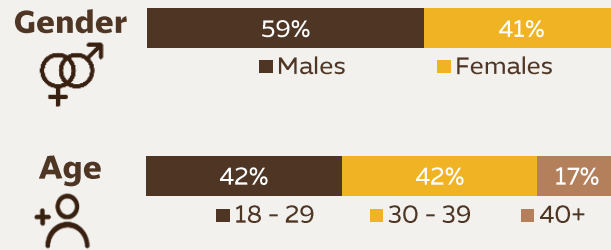


Self Enrichers	Experience Seekers	Fun Seekers	Passives
			
<p>As ambitious learners who focus on self-growth, Self Enrichers are Expo’s most promising segment from a visitation perspective. The segment reacts most positively to the Expo proposition with a 12% increase in intended visitation*.</p> <p>This segment is projected to contribute the highest number of visits to the Expo 2020, due to their segment size.</p> <p>As enthusiastic learners, they are projected to drive more season pass visits than any other segment. Expo should be positioned as a venue that offers them a chance to learn something new and invaluable with every visit.</p>	<p>As learning and entertainment enthusiasts, Experience Seekers show good visitation potential. They are excited by the Expo proposition*, have the highest intent to visit, and the highest average number of visits per household.</p> <p>This segment is the highest adopters of season passes.</p> <p>Immersive experience that support a cause will appeal to them, as well as unique experiences at Expo 2020 will trigger initial and repeat visits. Given their attitudes and dispositions, this group shows the highest potential to engage with Expo 2020 activations</p>	<p>Fun seekers have a fair potential to visit: their intent to visit is strong, but wasn’t further developed following their exposure to the Expo proposition* as they are naturally more content driven.</p> <p>This segment is projected to contribute the second highest number of visits, with the biggest volume of their visits coming from season passes.</p> <p>Fun seekers value entertainment and like to make the most of every moment. Expo 2020 Dubai should be positioned to them as fun, social and cultural exchange.</p>	<p>While this segment is made up of mostly disengaged individuals, and show relatively lower intent to visit Expo,</p> <p>Passives cannot be overlooked given their size and the associated number of visits they will ultimately contribute.</p> <p>While Passives are the least likely to be brand ambassadors they must be kept informed of Expo content and programming to help them determine when to visit.</p>

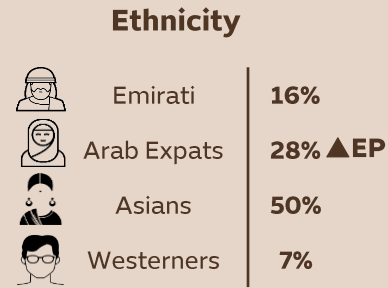
* Respondents were shown a small introductory video about Expo 2020 explaining the basics of the events and what to expect.



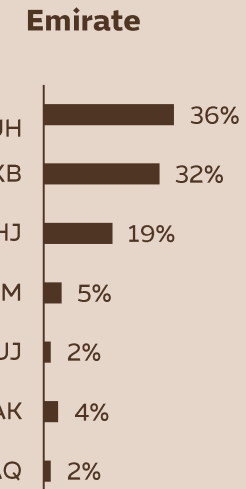
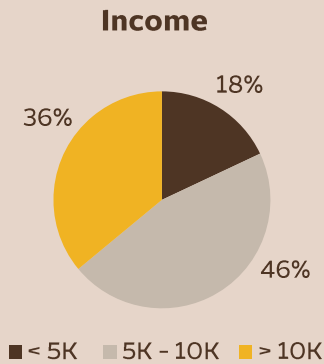
Need for culture and learning: **High**
Need for entertainment and leisure: **Low**



WHO THEY ARE:



Demographics:



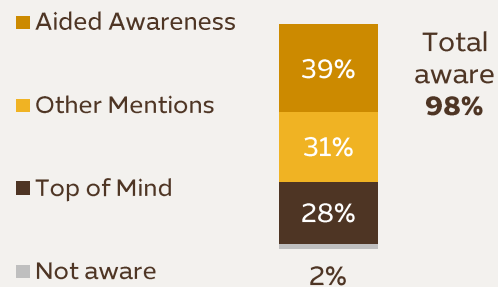
Defining attitudes:

(Rated 8/9/10 out of 10)



Expo 2020 Key Stats:

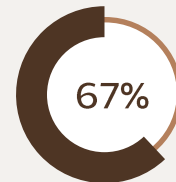
Awareness of Expo 2020



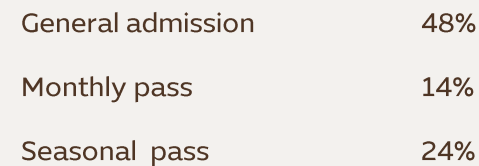
Consideration to visit

Consideration to visit

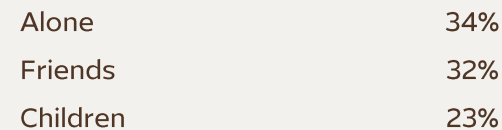
(Rated 9/10 out of 10)



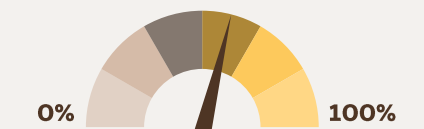
Type of ticket purchased**



Most likely companion



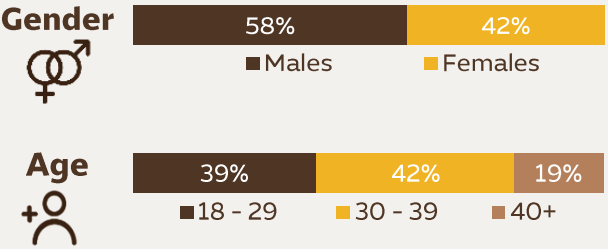
Personal relevance*



Believe that Expo 2020 Dubai is relevant to them

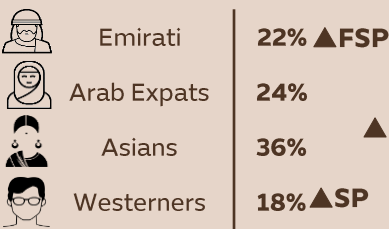


Need for culture and learning: **High**
 Need for entertainment and leisure: **High**



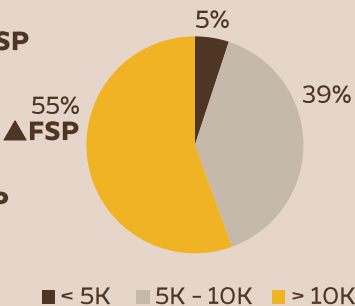
WHO THEY ARE:

Ethnicity

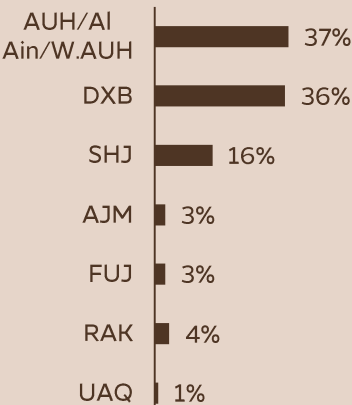


Demographics:

Income



Emirate



Avg # of people in the household

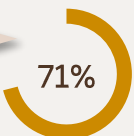


Defining attitudes:

(Rated 8/9/10 out of 10)



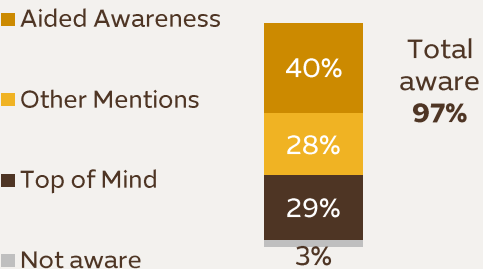
I like helping others whenever I can



I consciously do things to support the environment

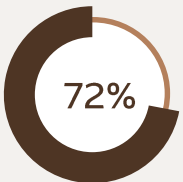
Expo 2020 Key Stats:

Awareness of Expo 2020



Consideration to visit

Consideration to visit
 (Rated 9/10 out of 10)



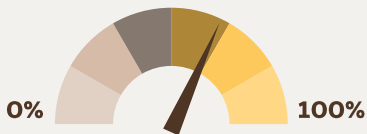
Type of ticket purchased**

General admission	31%
Monthly pass	19%
Seasonal pass	39%

Most likely companion

Alone	34%
Friends	32%
Children	23%

Personal relevance*



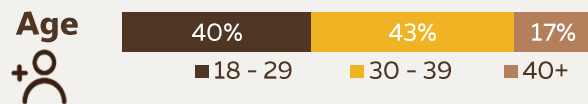
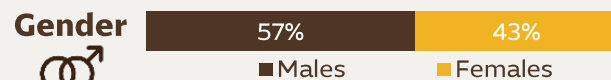
73% Believe that Expo 2020 Dubai is relevant to them

▲ E/F/S/P: Indicates option is significantly higher than other segments

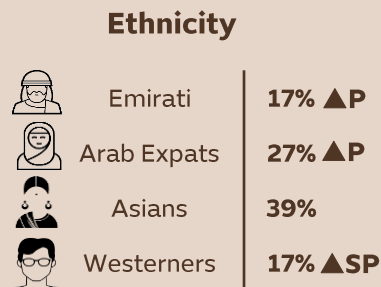
Source: Expo 2020 Domestic Segmentation, 2018
 * Expo 2020 Brand Tracker
 ** Expo 2020 Pass Pricing Research



Need for culture and learning: **Low**
Need for entertainment and leisure: **High**



WHO THEY ARE:

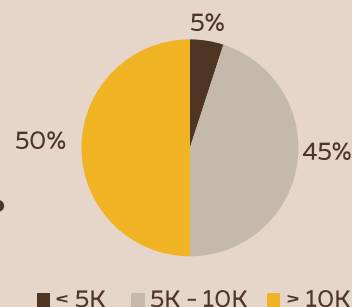


Avg # of people in the household

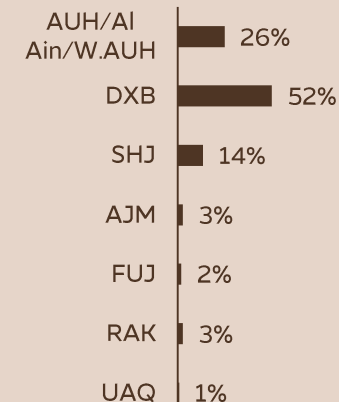


Demographics:

Income

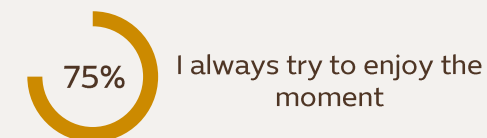


Emirate



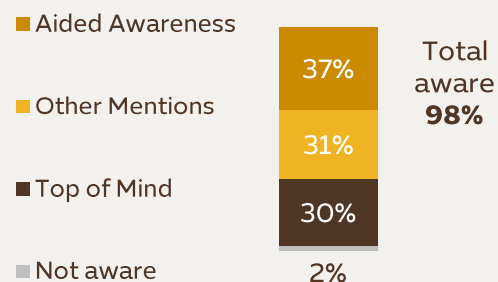
Defining attitudes:

(Rated 8/9/10 out of 10)



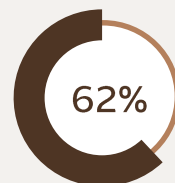
Expo 2020 Key Stats:

Awareness of Expo 2020

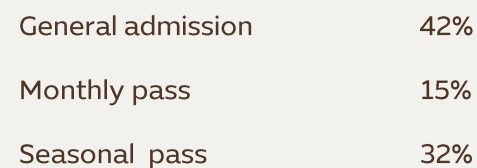


Consideration to visit

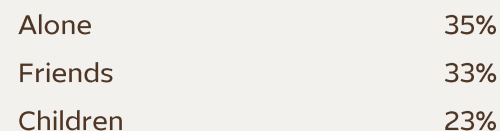
Consideration to visit
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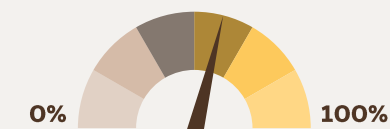
Type of ticket purchased**



Most likely companion



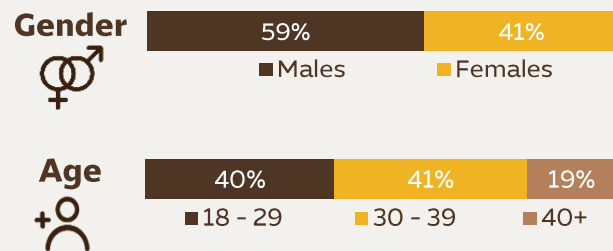
Personal relevance*



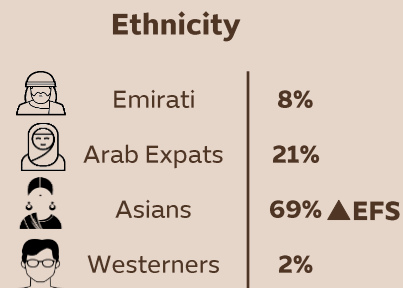
69% Believe that Expo 2020 Dubai is relevant to them



Need for culture and learning: **Low**
Need for entertainment and leisure: **Low**



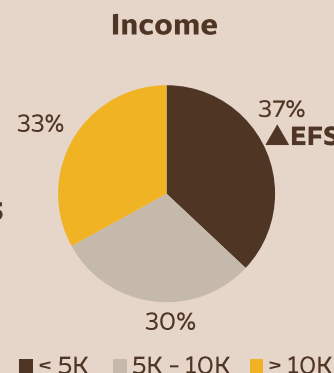
WHO THEY ARE:



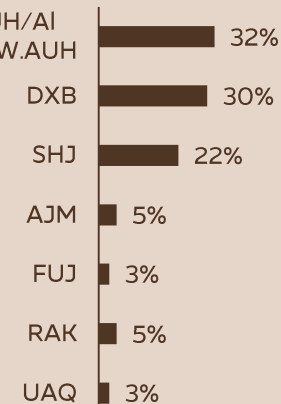
Avg # of people in the household



Demographics:



Emirate



Defining attitudes:

(Rated 8/9/10 out of 10)



I tend to be economical/ careful about how I spend my money

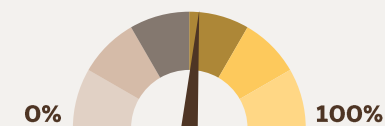


Advertising helps me keep up-to-date about products and services that I need or would like to have



Owning material possessions is important to me

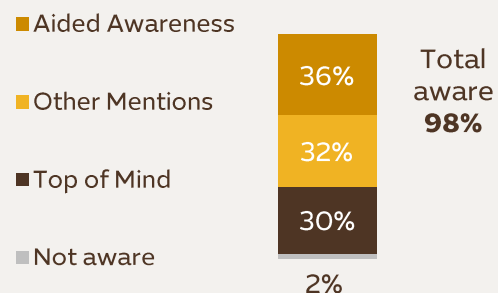
Personal relevance*



Believe that Expo 2020 Dubai is relevant to them

Expo 2020 Key Stats:

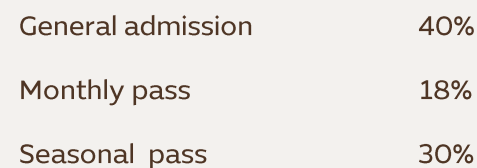
Awareness of Expo 2020



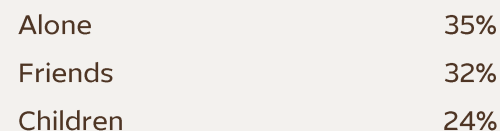
Consideration to visit



Type of ticket purchased**

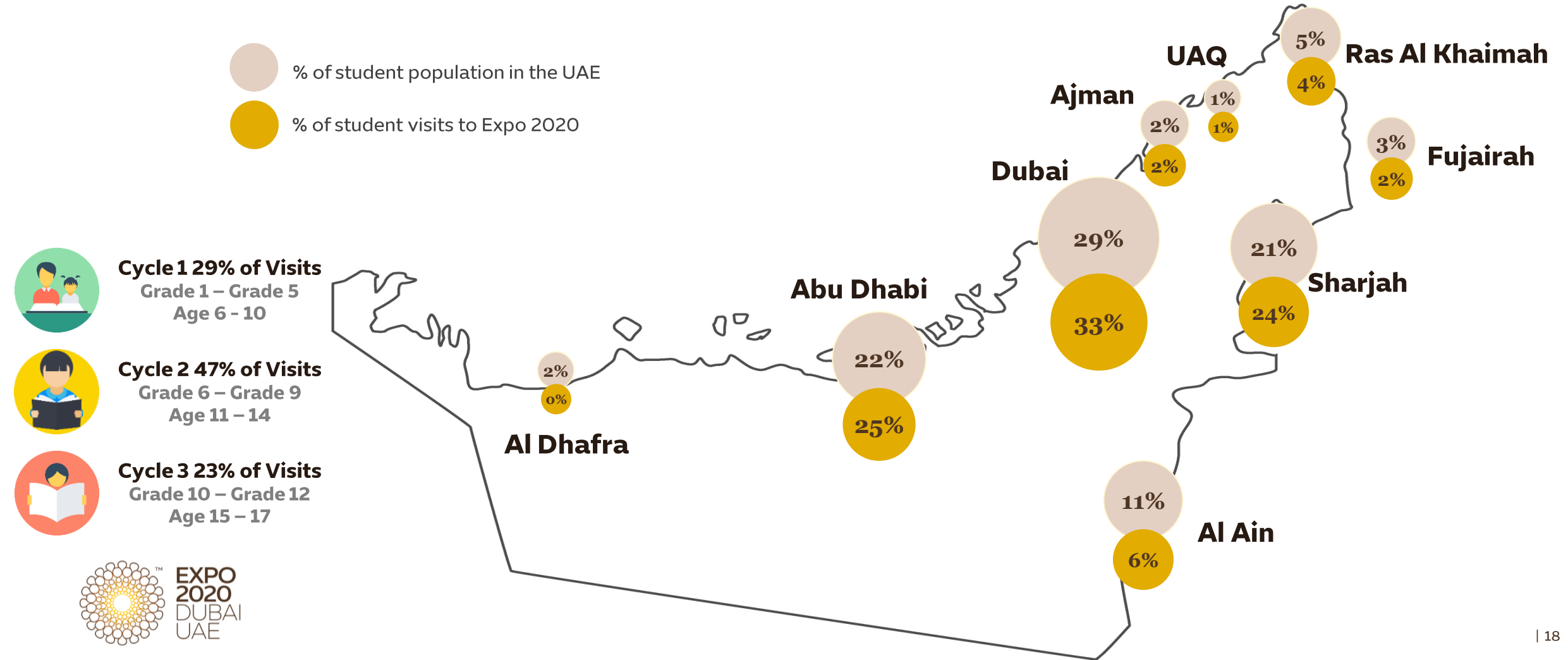


Most likely companion



Student Visitors

2.3 million visits are expected through the Expo School Programme, making up over 20% of domestic visits. Dubai, Abu Dhabi and Sharjah will contribute 82% of student visits.

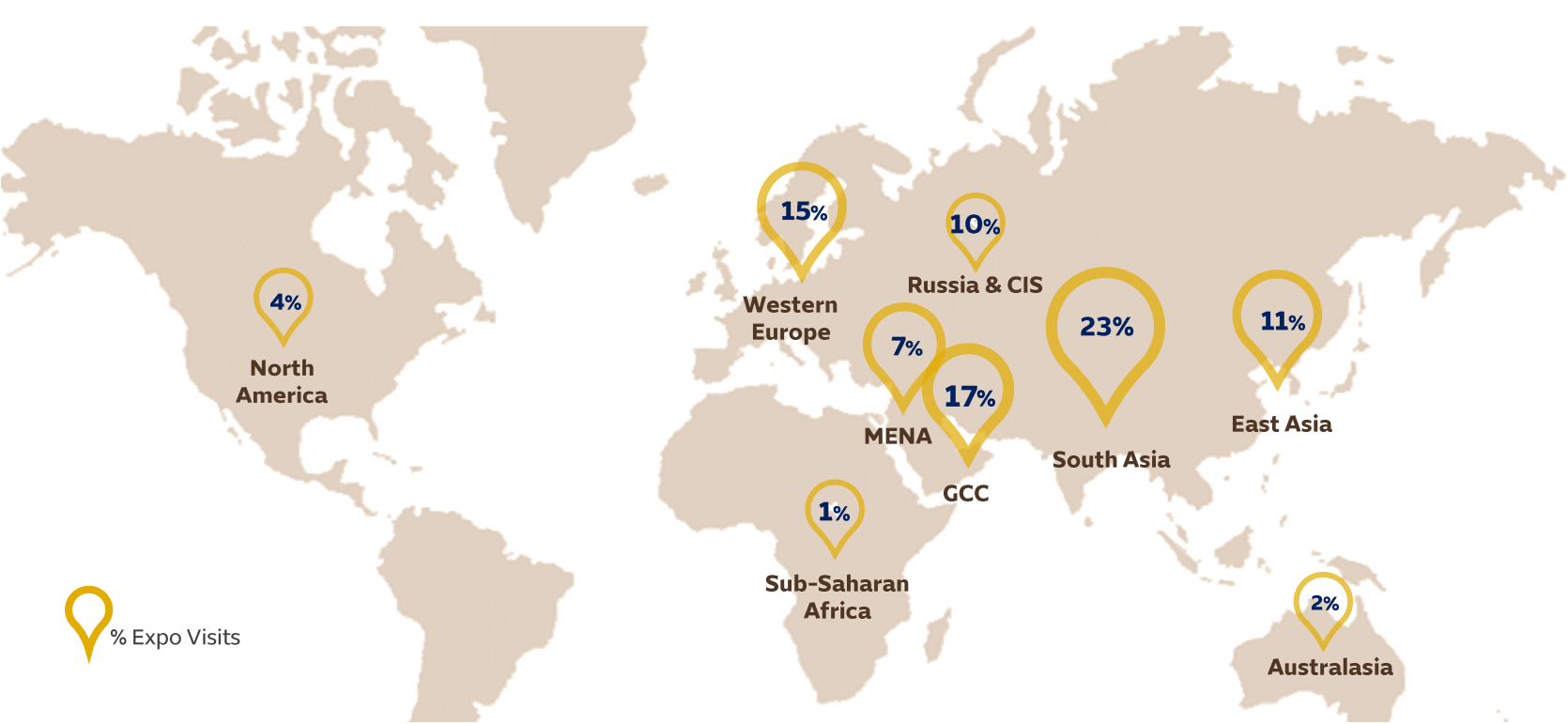


International Visitation



Expo 2020 International Visitation Overview

International Visitor expectations are in line with UAE visitation patterns, with the highest proportion coming from South Asia, the GCC, and Europe.

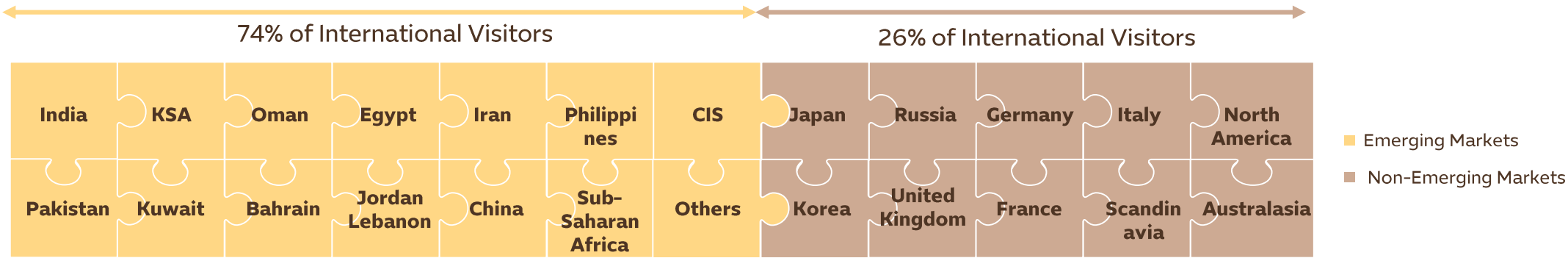


Region	Expected Expo 2020 Visitors
South Asia	2.5M
GCC	1.9M
Western Europe	1.7M
Russia & Commonwealth of Independent States	1.1M
East Asia	1.3M
Middle East	0.7M
North America	0.4M
Australasia	0.2M
Sub-Saharan Africa	0.1M
Other	1.2M
Total	11.2M

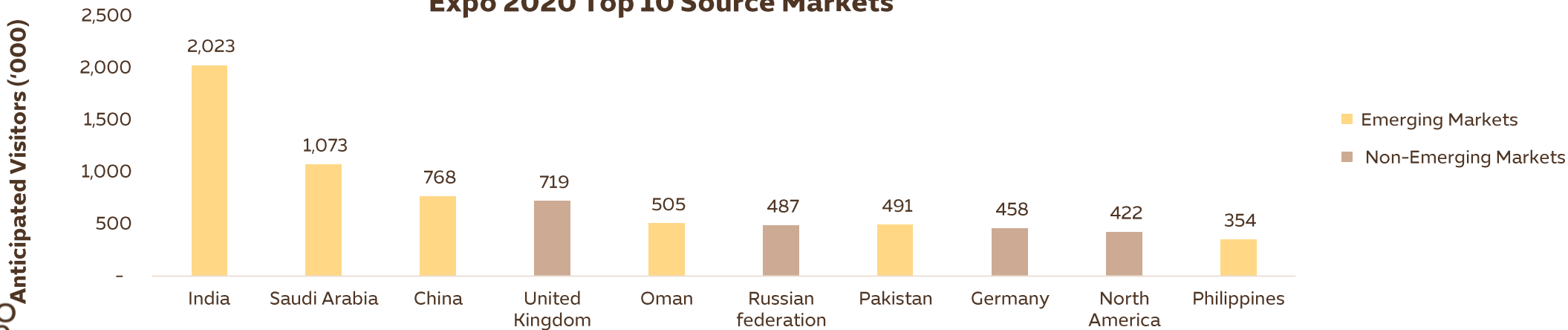
Expo 2020 International Visitation Overview

6 of Expo 2020's top 10 source markets are emerging markets,
3 in 4 international visitors are expected to come from emerging markets.

Expo 2020 International Visitors



Expo 2020 Top 10 Source Markets



International Adult Leisure Visitors:

International Visitors, by Segment



International Adult Leisure Visitors:

General Attitudes

Self Enrichers



Self Enrichers are curious and have a great desire for learning and experimenting, experiencing different and new things when they travel. They are of a diverse nature as they are excited to try different types of food, visit museums and opera houses, as well as explore the country-side and go on wildlife safaris.

Experience Seekers



Experience Seekers like to take in 360 degree experience when travelling. They are interested in learning and experiencing foreign cultures through the food, landmarks and museums, as well as having fun at theme parks, water parks and attending different events. They also like to be in the wild, among the mountains. They also like to explore the city through public transportation.

Fun Seekers



Fun Seekers crave excitement and adventure. Long road trips and lodging in bungalows and resorts are their holiday essentials. They enjoy attending events and concerts, as well as playing sports and recreational activities. They seek out mountains, the desert and wildlife and like spending time in water parks.

Passives



Passive travelers mostly play it safe and staying in their comfort zone while travelling. They tend to be less adventurous, and stick to know what they know best thus their travel itinerary would mostly consist of exploring the well known museums or landmarks of the city. They also like relaxing on the beach and often look for cheap holiday options.

International Adult Leisure Visitors:

Travel Motivations

Response to Expo 2020 Proposition



Self Enrichers



Driven by experiences and their thirst for learning, Self Enrichers travel to destinations that offer great cultural attractions, great shopping *experiences*, and being in nature (experiencing beautiful scenery or a great beach).

Self Enrichers respond favourably to Expo's proposition, and are specifically attracted to the possibility of learning about new cultures, learning about new opportunities, and being exposed to innovative ideas.

Experience Seekers



Wanting to maximize the utilization of their time, Experience Seekers seek travel experiences that offer it all: world class beaches, great cultural attractions, and beautiful landscapes and scenery.

Experience Seekers find several aspects of the Expo proposition appealing; indicating that learning about new cultures and opportunities, as well as entertainment, innovation and entry pass affordability to be their top motivators.

Fun Seekers



As leisure and entertainment travelers, Fun Seekers prioritize popular destinations that offer world class beaches and offer beautiful landscapes and natural scenery.

Fun Seekers tend to be attracted to the entertainment that Expo has to offer, but are also intrigued by the innovation and new opportunities that might be unveiled at the event.

Passives



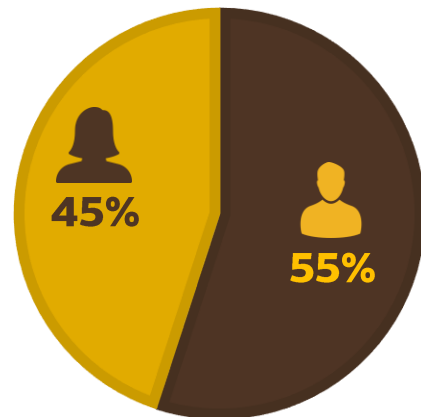
Preferring to stay in their comfort zone, Passive travelers predominantly choose popular destinations. Factors such as beaches, shopping experiences and beautiful scenery are also cited, but as secondary to destination popularity.

Passives provide a reserved response to Expo's proposition. Across source markets affordable entry prices appears as a consistent motivator, attached to either entertainment and leisure. This emphasizes the importance of facilitating an easily accessible Expo 2020 experience to this group.

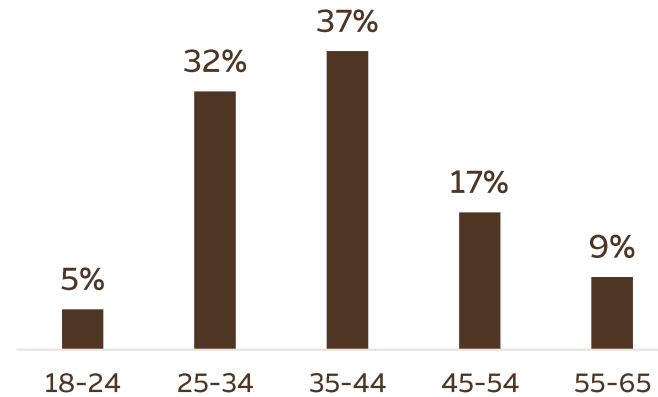
International Visitors

The demographics of international visitors are expected to be in line with Dubai's visitor mix.

GENDER BREAKDOWN



AGE BREAKDOWN



Note: Above data is based on DTCM's International Visitor survey and reflects the age of primary respondent

UAE International Visitor - General Behaviours

International visitors to the UAE primarily come for leisure and stay at hotels, with 1 in 4 returning for a second visit. Most book their activities in the UAE prior to their arrival.

Visit Purpose



DXB Visitors	
Leisure	74%
Business	12%
Visiting Friends and Relatives	13%
Others	1%

Accommodation

DXB Visitors	
Hotels	82%
Hotel Apartments	3%
With Friends and Relatives	14%
Other	1%

Repeat Visitors in last 12 Months

DXB Visitors	
First time Visitor	75%
Repeat Visitor	25%

Party Makeup

DXB Visitors	
Family with children	34%
Couples	41%
Individuals	14%
Friends	8%
Colleagues	3%



Average Trip Length



DXB Visitors	
Length of Stay (days)	7.6

Booking Activities



UAE Visitors	
Booking at the gate (upon arriving to the site)	26%
Booking prior to arrival independently	46%
Booking prior to arrival with tour package	13%
Booking prior to arrival through the hotel	9%
Booking after arrival through the hotel	11%



Anticipated Visitor Flow



Visitor Flow

Anticipated Daily Visitation and Dwell Time

Daily Distribution**		
	DOMESTIC	INTERNATIONAL
SUNDAY	9%	14%
MONDAY	9%	13%
TUESDAY	9%	13%
WEDNESDAY	9%	14%
THURSDAY	14%	14%
FRIDAY	30%	16%
SATURDAY	20%	16%

***Daily Distribution based on blended benchmark from UAE attractions daily distribution for both domestic and international visitors.*

Expo Dwell Time			
	DAY EXPO	NIGHT EXPO	SPECIAL DAYS
DOMESTIC	6h	4h	8h
INTERNATIONAL	9h	4h	12h
SCHOOL	4h	N/A	N/A



Visitor Flow

Expo visitation is expected to be higher on weekends than weekdays. Moreover, Thursdays are expected to be busier than other weekdays as we expect more visitors Thursday evenings.

Daily Averages

	Special Days	Weekday	Thursday	Friday	Saturday
Average	211k	130k	139k	167k	148k
Min	170k	114k	124k	130k	121k
Max	250k	148k	152k	207k	183k

Peak on Site: The highest number of visitors the Expo site at any given moment (Considering Arrivals, Departures and Dwell time).

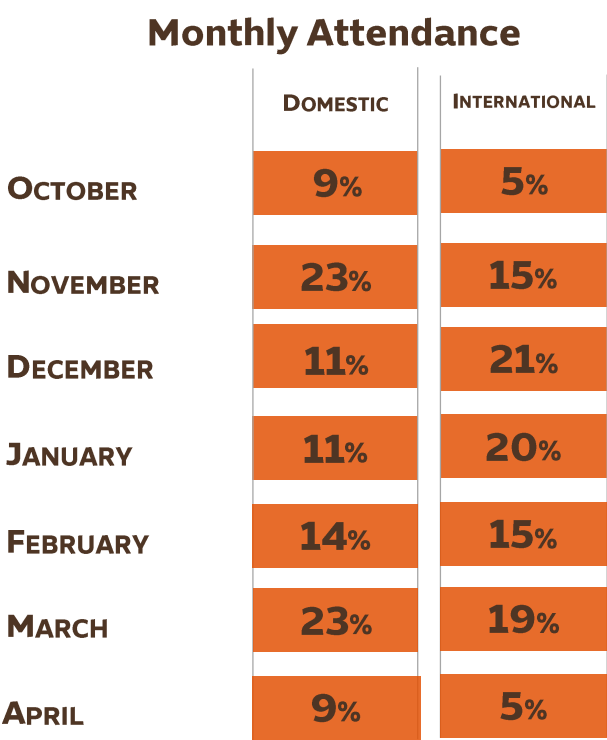
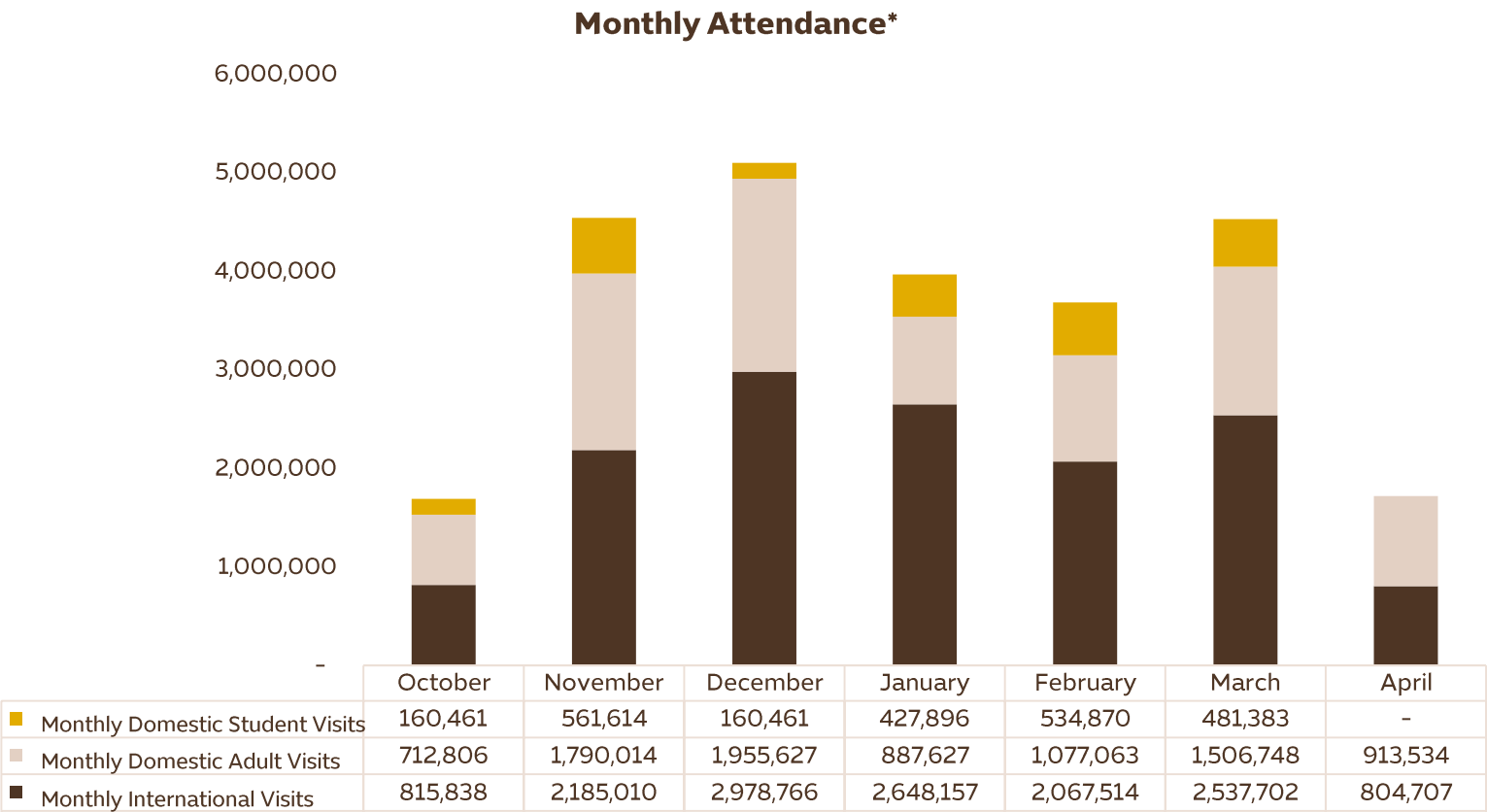
	Special Days	Weekday	Thursday	Friday	Saturday
Average	217k	90k	94k	107k	102k

		SPECIAL DAYS	WEEKDAY		WEEKEND	
VISITORS SPLIT			SUN-WED	THURSDAY	FRIDAY	SATURDAY
INTERNATIONAL	20%		64%	60%	57%	69%
DOMESTIC	80%		38%	40%	43%	31%



Visitor Flow

Expo 2020 visitation is expected to peak in December, and soften in January / February. It is expected to pick up in March and the few days in April as the event wraps up.

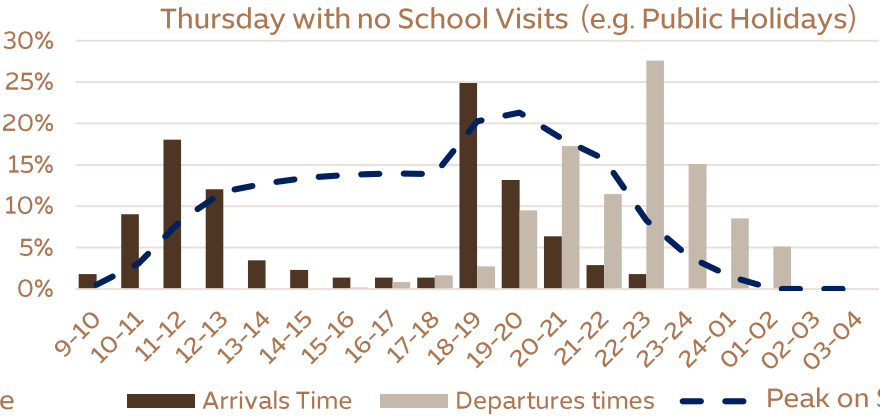
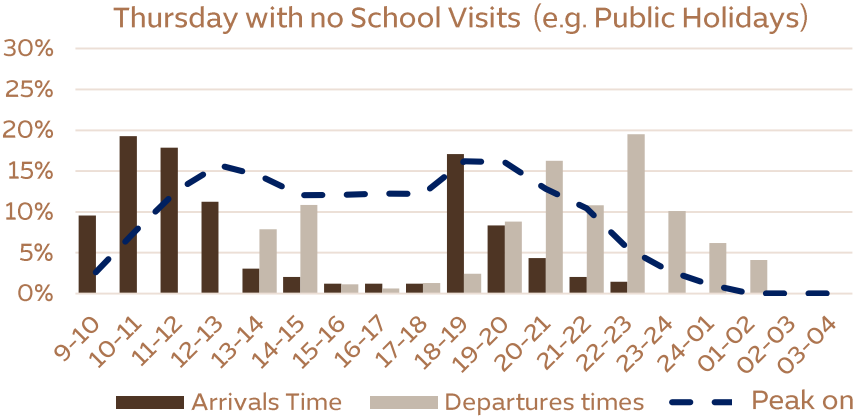
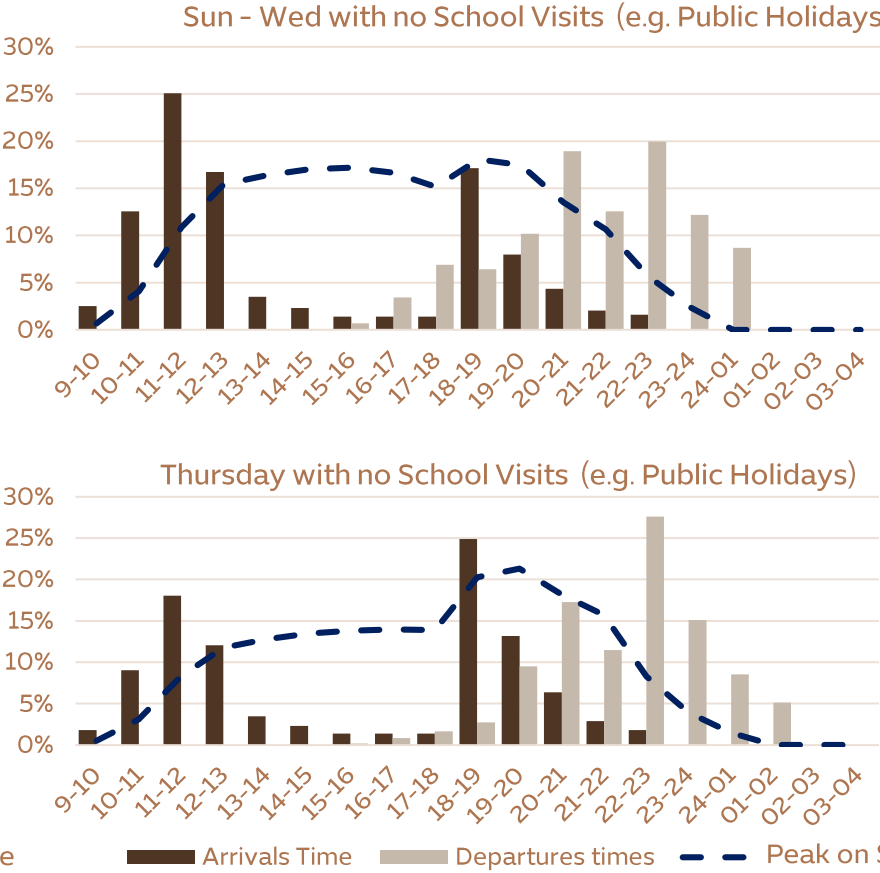
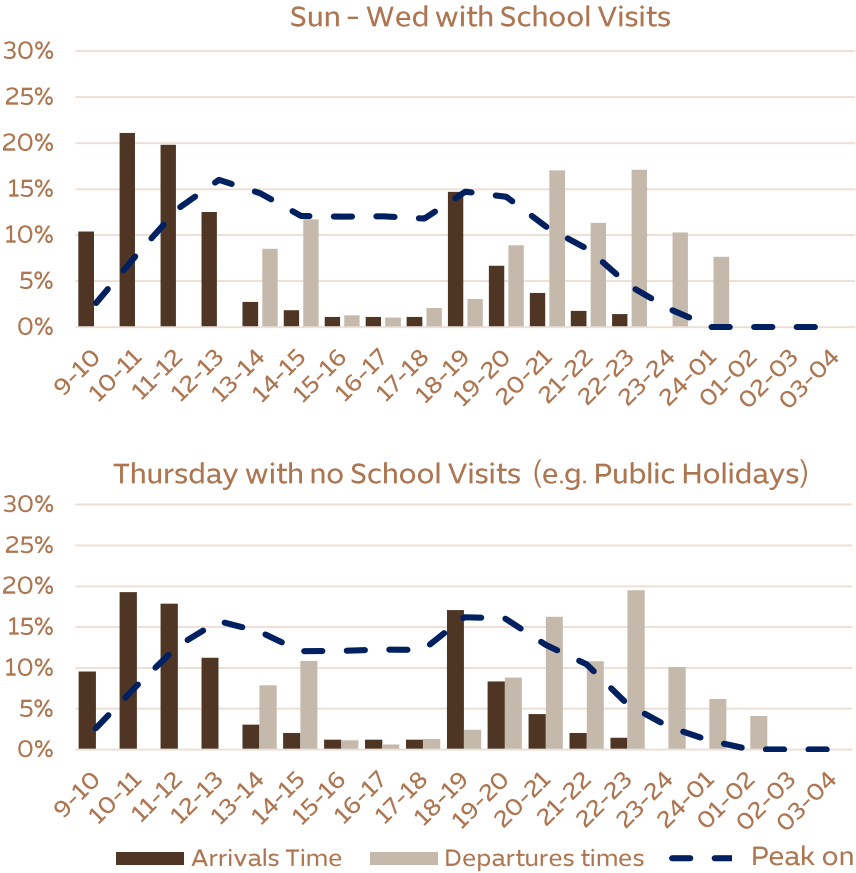


**Breakdown based on DTCM information for the International market and based on the AECOM Report for the domestic market*



Visitor Flow

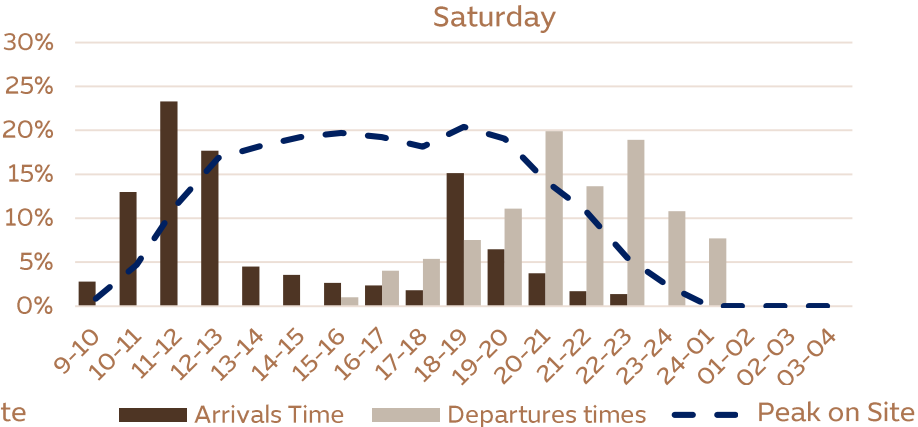
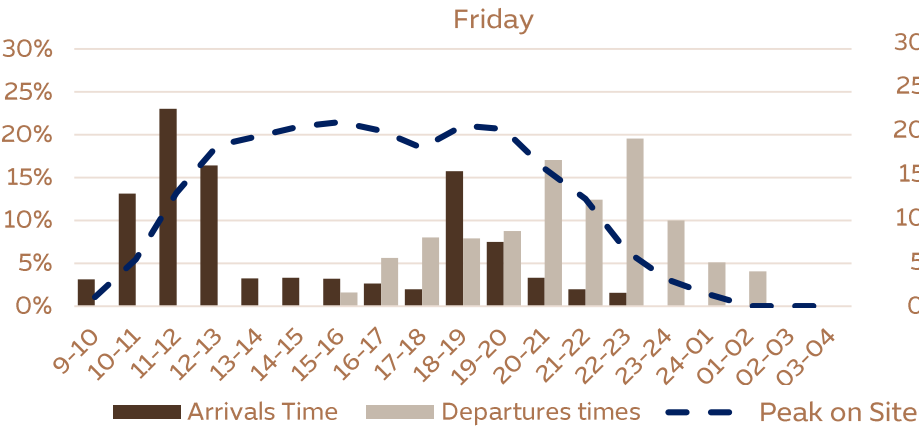
Weekday Arrival and Departure Times



Note: Visitor Arrival and Departure patterns for all Special Days (including New Years Day) will be determined once the program for each of the days is finalized.

Visitor Flow

Weekend Arrival and Departure Times



Visitor Flow

Arrival and Departure Times

Arrival / Departure Times																	
Sun to Wed with School Visits	9-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-01	01-02
% of Visitors Arriving	10%	21%	20%	13%	3%	2%	1%	1%	1%	15%	7%	4%	2%	1%	0%	0%	0%
% of Visitors Departing	0%	0%	0%	0%	9%	12%	1%	1%	2%	3%	9%	17%	11%	17%	10%	8%	0%
Sun to Wed with no School Visits	9-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-01	01-02
% of Visitors Arriving	3%	13%	25%	17%	3%	2%	1%	1%	1%	17%	8%	4%	2%	2%	0%	0%	0%
% of Visitors Departing	0%	0%	0%	0%	0%	0%	1%	3%	7%	6%	10%	19%	13%	20%	12%	9%	0%
Thursday with School Visits	9-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-01	01-02
% of Visitors Arriving	10%	20%	19%	12%	3%	2%	1%	1%	1%	17%	8%	4%	2%	1%	0%	0%	0%
% of Visitors Departing	0%	0%	0%	0%	8%	11%	1%	1%	2%	3%	8%	16%	11%	19%	10%	6%	4%
Thursday with no School Visits	9-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-01	01-02
% of Visitors Arriving	2%	11%	23%	15%	3%	2%	1%	1%	1%	20%	10%	5%	2%	2%	0%	0%	0%
% of Visitors Departing	0%	0%	0%	0%	0%	0%	1%	3%	6%	6%	9%	17%	11%	22%	12%	7%	5%
Friday	9-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-01	01-02
% of Visitors Arriving	3%	13%	23%	16%	3%	3%	3%	3%	2%	16%	7%	3%	2%	2%	0%	0%	0%
% of Visitors Departing	0%	0%	0%	0%	0%	0%	2%	6%	8%	8%	9%	17%	12%	20%	10%	5%	4%
Saturday	9-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-01	01-02
% of Visitors Arriving	3%	13%	23%	18%	4%	4%	3%	2%	2%	15%	6%	4%	2%	1%	0%	0%	0%
% of Visitors Departing	0%	0%	0%	0%	0%	0%	1%	4%	5%	8%	11%	20%	14%	19%	11%	8%	0%
Special Days	9-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-01	01-02
% of Visitors Arriving	4%	11%	14%	10%	9%	11%	13%	10%	6%	6%	3%	1%	1%	0%	0%	0%	0%
% of Visitors Departing	0%	0%	0%	0%	0%	0%	0%	0%	2%	6%	9%	7%	8%	15%	18%	20%	15%



**Bureau
International
des Expositions**