CSRE

THE CENTRE FOR SUSTAINABILITY
THROUGH RESEARCH AND EDUCATION

RESEARCH PROJECT

The UAE as a Sustainable Tourism Destination

STAGE 1

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The UAE as a Sustainable Tourism Destination

CONTENTS

EXECUTIVE SUMMARY

EXPO 2020 Sustainability Department, in cooperation with Centre for Sustainability through Research and Education (CSRE) at Modul University Dubai, is conducting a ground-breaking, sustainable tourism longitudinal research. With the invaluable support of the UAE Tourism authorities, this research study will enable key tourism stakeholders to monitor changing visitor motivation, visitors' sustainability inclinations, destination brand perception and tourism impacts over time. In parallel, this research will also analyse the catalytic effects of EXPO 2020 on brand positioning and the future of the UAE as a sustainable tourism destination.

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Total of 3100 respondents in 110 countries throughout Asia-Pacific, the Middle East, Europe, North America, Latin America, and Africa.

Contemporary tourists are more experienced and sophisticated travellers interested in aligning their personal values and lifestyle with their travel behaviour. This is why this project's scope extends beyond a typical tourist market study by focusing on tourists' sustainability awareness, lifestyle and values, as they ultimately influence ones travel and purchase behaviours.

To assess the current perception of Dubai as a sustainable tourism destination, as well as the impact of World Expo and sustainable practices on destination choices, several surveys (one UAE based and two global online surveys), were carried out from November 2019 till April 2020.

The findings of the global surveys are based on claimed behaviours and responses of a total of 3100 respondents in 110 countries throughout Asia-Pacific, the Middle East, Europe, North America, Latin America, and Africa. Stage 1 of the research addressed the following:

- The tourist profile with a focus on the sustainability-minded tourist market segment including travel information, media channels and messaging recommendations
- The current perception of Dubai as a sustainable tourism destination
- The impact of sustainable practices on destination choices
- The impact of Expo 2020 on destination choices

The tourist profile with a focus on the sustainability-minded tourist market segment

The first segment of the study was designed to measure and describe the sustainability-minded tourist market in Dubai, UAE. Particular attention was paid to tourists' sustainability-awareness, sustainability-focused attitudes, behaviours, psychographics, lifestyle and price sensitivity, in order to provide readers with the information they need to capitalize on this growing trend and promote sustainability initiatives in the tourism sector.

Dubai visitors mostly like to participate in outdoor activities such as camel and horse riding, biking, hiking, safari, etc. They are just as likely to visit museums, monuments and other cultural attractions.

In order to explore the above, a global online survey was carried out from December 2019 to April 2020. A total of 1160 adult respondents from 84 countries throughout Asia-Pacific, the Middle East, Europe, North America, Latin America, Australia and Africa participated in the survey. In addition, to obtain greater insight into the responsible and pro-sustainable behaviour of hotel guests in Dubai and to confirm the validity of the visitor survey findings, hotel employees were asked to observe and evaluate their guests' pro-sustainability behaviour and interest in sustainability initiatives.

The research shows that over 60% of Dubai visitors are Millenials, predominantly in the Gen Y.2 age group (30-40). They tend to be well educated, full-time employed and in the higher income category. Most of them are married with children.

With regards to their travel behaviour, Dubai visitors are often repeat visitors who prefer short, 2-3 days stays in hotel accommodation (especially 4-5 stars). They mainly travel with a friend, relative or a partner, mostly for vacation and business purposes. At destination, they generally use taxi (Uber / Careem included) and spend between US$1000 and US$3000 during their visit, mostly on shopping and food. Dubai visitors mostly like to participate in outdoor activities such as camel and horse riding, biking, hiking, safari, etc. They are just as likely to visit museums, monuments and other cultural attractions.

When choosing where to travel, their priorities are to experience different cultures and visit new destinations, followed by the availability of crowd-free beaches, interaction with local people, interesting sightseeing and an opportunity to explore independently, which indicates that responsibility in travel choices is an important factor for Dubai visitors.

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Media channels and messaging recommendations

The study showed that Dubai visitors mainly use global booking websites such as Booking.com and Expedia.com to arrange their trips.

Throughout their daily lives, television and YouTube are the most dominant media they use. The information sources that Dubai visitors use to plan their trip to Dubai are mostly friends and family recommendations, followed by travel agencies, tourism fairs and social media channels. Regarding media channels, Dubai visitors are very active when sharing travel information online, especially on Facebook and Twitter. They follow official social media accounts of travel destinations, hotels, restaurants and clubs they visit, and rely on them as an important information source.

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The majority of Dubai visitors regularly engage in outdoor actives or go to the gym, but also practice meditation, yoga or Pilates, indicating they take care of their health and wellbeing in everyday life.

Sustainability and responsible travel behaviour

Sustainability is an important concept for Dubai visitors, which influences their lifestyle choices and travel behaviour. Their main sustainability-related concerns are global warming, air pollution, human rights and quality and conservation of water. They show sound understanding of global warming and renewable energy concepts and are the most familiar with Recycling and Energy star label symbols. Nearly 22%

Nearly 22% of Dubai visitors consider themselves responsible, sustainability-minded travelers, whilst another 64% admit they fall into this category from time to time.

of Dubai visitors consider themselves responsible, sustainability-minded travelers, whilst another 64% admit they fall into this category from time to time. Sustainability-related information about a destination influences visitors' decision to visit that destination, and they are willing to engage with social media campaigns to support sustainability goals. They are oriented towards experiences and will choose to travel more sustainably, with the majority of Dubai visitors prepared to pay at least 5% more for responsible travel options. Preservation of the local natural environment seems to be their top priority, while 40% would gladly pay 20% or more for eco friendly accommodation.

Guests did not openly show interest in eco-certification of hotels, yet are ready to pay more for eco-certified products and services, reuse room towels, use public transport (bus, metro, tram) and minimize water consumption.

Hotel employees observed that guests mostly noticed eco and sustainability initiatives in their hotels but did not notice eco and sustainability initiatives in Dubai as often. Guests showed strong interest in the local cuisine and also commented that local Emirati products are often not available in Dubai. Guests did not openly show interest in eco-certification of hotels, yet are ready to pay more for eco-certified products and services, reuse room towels, use public transport (bus, metro, tram) and minimize water consumption. Results also indicated that responsible behaviour and pro-sustainability interests of hotel guests are present but not consistent.

Sustainability-based segmentation of the Dubai tourist market

Based on the cross-analysis of multiple variables; the respondents' habits, behaviours and sustainable practices, levels of sustainability awareness, the meaning respondents attach to sustainability and finally, their self- assessment of whether they are responsible travelers, the Dubai tourist market was segmented into three distinct categories:

1. GENUINE RESPONSIBLE TOURISTS, who are highly sustainability-minded and make up 22% of the Dubai tourist market.
2. OCCASIONAL RESPONSIBLE TOURISTS, who show inconsistent pro-sustainability travel behaviour, and are not strict in sustainability actions. They represent the largest part of the market (64.5%).
3. CONVENTIONAL TOURISTS, who do not engage in sustainability-related tourist behaviours and do not consider themselves responsible travellers, represent 13.6% of the Dubai tourist market.

Analysis of the above categories showed significant differences between these three tourist-segments, which are further described on page 78 of the report.

Dubai tourist market was segmented into three distinct categories:

GENUINE RESPONSIBLE TOURIST

OCCASIONAL RESPONSIBLE TOURISTS

CONVENTIONAL TOURISTS

The current perception of Dubai as a sustainable tourism destination

The second segment of the study was designed to assess the current perception of Dubai as a sustainable tourism destination, as well as the impact of World Expo and sustainable practices on destination choices. A total of 1760 adult respondents from Asia-Pacific, the Middle East, Europe, North America, Latin America, Australia and Africa participated in the global survey, carried from January to April 2020. In addition, to confirm the validity of the visitor survey findings, hotel employees were asked to evaluate their guests' interest in sustainability initiatives, guests' perception of Dubai as a sustainable tourism destination, as well as their interest and awareness of the World Expo and Expo 2020, Dubai.

The results of the global study show that respondents mostly perceive Dubai as a sustainable tourism destination. They consider it a clean, luxurious, safe and an authentic destination with friendly tourism staff. The respondents from India and Pakistan have the most positive perception of Dubai while respondents from China, Russia, the UK and the USA are slightly more critical.

The highly educated, full time employed

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respondents with higher monthly household income (aged 30-40), showed more positive attitudes towards Dubai compared to other respondent groups, which is in line with a general profile of responsible tourists in the literature review.

Interestingly, Dubai visitors perceived the city in a more positive and sustainable way than those who did not visit, indicating they could be good ambassadors of Dubai's image as a sustainable destination.

Dubai hotel employees agreed that their guests consider Dubai a safe and very clean destination, with good public transport, authentic experiences and friendly residents. In addition, they highlighted that nearly half of the guests had concerns about Dubai being overcrowded. Hotel employees also observed that half of their guests did not notice eco and sustainability initiatives in Dubai, and that they think local Emirati products and services are not always available. This indicates that the promotion of sustainability actions and local products is needed, in order to create greater awareness that Dubai is a sustainable tourist destination.

The worldwide image of Dubai as a sustainable tourist destination should be improved by promoting its sustainability initiatives, eco-friendly tourist activities, eco-friendly accommodation and its natural resources and cultural heritage.

Dubai visitors perceived the city in a more positive and sustainable way than those who did not visit, indicating they could be good ambassadors of Dubai's image as a sustainable destination.

Impact of sustainable practices on destination choices

In this global study, more than 90% of respondents consider themselves responsible tourists to an extent (always or sometimes), indicating that sustainability has become the mainstream mindset rather than a trend related to a niche market.

The most important factors that influence tourists' destination choices are: clean environment, personal safety and security, good value for money, positive attitudes of the local community towards tourism and friendly residents, preserved cultural and natural heritage, good public transport, availability of local food and products, the possibility to experience local customs and way of life, the availability of eco-friendly tourist activities and accommodation. These factors should be the focus of marketing campaigns in targeting Genuine and Occasional responsible tourists.

Sustainable practices have a strong impact on a tourist's decision to visit a certain destination, and therefore should be a part of the destination tourism strategy and branding.

The results of the study indicate that nowadays sustainable practices have a strong impact on a tourist's decision to visit a certain destination, and therefore should be a part of the destination tourism strategy and branding.

Impact of the World Expo on destination choices

Despite the popularity of mega-events such as the World Expo, very little is known about whether hosting this type of event leads to anything more than a short-term increase in international visitor arrivals to the host country.

In this global study, 67% of respondents are aware that Dubai is the host of World Expo 2020. The respondents that have visited the city are more familiar with this fact and show a stronger intent to visit Dubai during the upcoming Expo 2020, compared to those who have never visited Dubai before. Those who do not have the intention to visit the city during this mega event are mostly from India, the UK and the USA. Approximately one-third of respondents were uncertain whether or not they would visit Dubai during Expo 2020. The visitor respondents and those who declare themselves as responsible tourists showed more interest in visiting Dubai during this period. Therefore, Dubai's DMO and Expo 2020 should focus on targeting these segments and providing them with some incentives to further promote the sustainable tourism offer.

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As mentioned above, the majority of respondents who did not know that the next World Expo will be held in Dubai came from India and the UK, additional promotional efforts would be required in those markets to raise awareness and attract visitors.

Dubai hotel staff observations showed that guests are very well informed about Expo 2020, that they express interest in the event and that many are planning to visit during this period. They confirmed that hotels expect higher occupancy rates during Expo 2020 and they believe that Expo 2020 will improve the image of the UAE and Dubai as a sustainable tourism destination.

In conclusion, this study has shown that Dubai responsible tourists show behavior similar to sustainable, responsible and ethical tourists, defined by previous studies in the field. The research has provided a deeper understanding of how tourists behaved before, during and after their trip, how they chose their destination, what was important enough for them to pay extra, their travel-related online behaviour and finally, their pro-sustainability travel choices. In addition, this study has shown that tourists have a very positive perception of Dubai as a sustainable tourism destination and that they would gladly visit during Expo 2020.

This study presents an important base for the creation of a strategy that will target responsible tourists, create effective messages, allow the selection of viable media channels and shape the tourism offer, based on the needs and preferences of this target segment.

STAGE 1
SECTION A

The tourist profile with a focus on the sustainability-minded tourist market segment

Media channels and messaging recommendations

CHAPTER 1 - LITERATURE REVIEW

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STAGE 1 - SECTION A
CHAPTER 1 - LITERATURE REVIEW

Introduction

This chapter of the report provides a comprehensive analysis and insight into attitudes, consumer values and consumer behaviour, of sustainability-minded visitors of Dubai. It represents an extensive review of the currently available academic literature and non-academic market reports available online.

The first part, discusses the profile of the 'sustainably engaged' tourists, explaining who they are, their socio-demographic characteristics, their values and their purchasing behaviour.

The second part, reviews the sources that analysed distribution and media channels used to reach 'sustainably engaged' tourists and give recommendations on how to most effectively and efficiently promote sustainable tourism products and practices.

While this chapter discusses the general profile and the travel behaviour of 'sustainable' tourists, the next chapter will provide more insight into the sustainability-engaged tourists visiting Dubai. Particular attention is paid to Dubai visitors' attitudes, behaviours, psychographics, lifestyle activities, and tourism product/service usage patterns in order to provide tourism stakeholders with the information they need to capitalize on growing sustainability and responsible tourism initiatives and trends.

1. THE GLOBAL TOURISM OVERVIEW

2. THE CONCEPT OF SUSTAINABLE TOURISM

3. PROFILE OF SUSTAINABLE TOURISM CONSUMER

4. SUSTAINABILITY MARKETING IN TOURISM

CHAPTER 1 HIGHLIGHTS

The concept of sustainable tourism

Sustainable tourism has become an important concept for destinations and tourism companies alike.

Sustainable tourism development requires the informed participation of all relevant stakeholders

Globally, sales growth of companies with a demonstrated commitment to sustainability were four times higher than that of competitors

The sustainability trend “presents opportunities for airlines, hotels, tour operators and tourism boards to differentiate the products and services they offer on the basis of sustainability and hence attract more customers.

Sustainable and responsible tourism is about making all tourism forms and activities more responsible

The marketing of sustainable attributes can enhance destination competitiveness and make destinations more attractive (Fjelstul, 2014).

Destinations enjoy many benefits from attracting responsible tourists, who not only contribute to the local economy but also take care of the environment and help safeguard local culture.

UNWTO ranks “experiential tourism”, as the fastest growing among the tourism sectors

Profile of sustainable tourism consumer

Increasing number of consumers and travellers are interested in aligning their personal values with the values of brands and companies whose services and products they use, especially when it comes to sustainability matters.

An increasing number of consumers in developed regions consider sustainability actions more of an imperative than a value-add (the Nielsen, 2015)

Majority of global travellers are seeking authentic experiences that are representative of the local culture.

Majority consumers seek authentic, ‘green’ experiences, as an escape from the stress of urban life, but also a deeper meaning in vacation experiences

Many of the “Gen-X” are environmentally conscious and have embraced green consumerism

Tourists seeking environmental and culturally differentiated destinations are willing to pay more for such experiences

Majority of global travellers say they would be more likely to book an accommodation knowing it was eco-friendly

Millennials continue to be the most willing to pay extra for sustainable offerings

The higher the household income of respondents, the greater the likelihood to book an eco-tourism holiday.

Consumers’ expectations of the responsible elements of their holiday and the authenticity and quality of their experience have risen.

Sustainability-engaged tourists tend to be experienced travellers

Consumers are concerned about the local environments of their travel destinations and are willing to spend more on their holidays if they are assured that workers in the sector are guaranteed ethical labour conditions

Sustainable tourists tend to be well educated, informed on a range of subjects, selective in their media consumption, and often opinion leaders

Luxury eco-tourism could be a win win scenario for Dubai tourism to attract more Chinese tourists.

Sustainability marketing in tourism

Well informed, educated and motivated tourists can help in achieving sustainability goals.

Many consumers find verbal explanations about sustainability issues too abstract or too complicated to grasp

Majority of consumers care about sustainability, but that they are willing to buy 'sustainability' only if there is a clear, personal benefit for them

Communicating sustainability should not look intimidating to the consumers, who are not concerned with sustainability issues and who will not pay extra for it.

Stakeholders involved in sustainable tourism should ideally apply all principles of sustainable practice to their marketing activities and communication

Communicating sustainability in tourism destinations, requires a multi-channel marketing approach, as a combination of marketing strategies communicated across multiple online and offline media channels

Communication of sustainable tourism management is more effective when offered through interactive channels

Geographic market segmentation is of great importance for how tourists source travel information, including sustainability

Sustainability marketing could have a greater impact if messages are more focused on consumer experience

Sustainability marketing should consider different phases of travel - in the browsing phase, effective messaging related to sustainability should focus on creating a good impression. On arrival and during their stay, tourists should be convinced that a business is genuinely committed to sustainability.

1. THE GLOBAL TOURISM OVERVIEW

Tourism is one of the world's largest industries. According to the World Travel & Tourism Council (WTTC, 2019), the Travel & Tourism sector accounts for 10.4% of global GDP and 319 million jobs (including jobs indirectly supported by the industry), or 10% of total employment in 2018. Travel & Tourism is a dynamic engine of employment opportunity, which supports one out of ten jobs on the planet. Over the past five years, one in five of all jobs created across the world has been in the tourism sector. In 2018solid growth in global consumer spending once again enabled the Travel & Tourism sector's growth to reach 3.9%, outpacing the global economy for the eighth consecutive year. The USA, China, Japan, Germany and the UK were the top five markets in 2018, collectively representing 47% of the global Travel & Tourism GDP. As in recent years, performance was particularly strong across Asia-Pacific region (WTTC, 2019).

A total of 1.4billion international tourist arrivals were recorded in destinations around the world in 2018. International tourist arrivals grew 5% in 2018, representing a9th consecutive year of sustained growth (UNWTO, 2019).

International tourism ranks third (after chemicals and fuels, and ahead of automotive products) in global exports, accounting for 6.5% of total global exports and 27.2% of total global service exports. In many developing countries, tourism is the top export category (UNWTO, 2018; WTTC, 2019).

1.1 International tourism arrivals and receipts

For the ninth year in a row, in 2018, Europe was the world's most visited region, led by Southern Mediterranean destinations. Asia-Pacific was the fastest growing region in 2018 (+7%). Results were driven by South Asia, with double-digit growth in Iran, Nepal, Sri Lanka and the sub-region's largest destination - India. Arrivals to the Americas increased by 2% in 2018, led by North America. International tourist arrivals in Africa increased by 7% and receipts increased by 2%, driven by the continued economic recovery in North Africa.

In 2018, The Middle East tourism statistics reflected rebound in some destinations, with 5% growth in arrivals and 4% in international tourism receipts in the region. In Saudi Arabia, the largest destination in the region, growth was somewhat slower, as well as in the United Arab Emirates. The Travel and Tourism sector is undoubtedly one of the most important contributors to the non-oil GDP and jobs in the UAE. In 2018, Dubai welcomed 15.92 million visitors, 0.8% more compared to 2017. India retained its spot as the top source market (with more than 2 million travellers), followed by Saudi Arabia, UK and China (Dubai Department of Tourism and Commerce Marketing (DTCM), 2018).

International tourism receipts increased 4.4% in real terms in 2018 (adjusted for exchange rate fluctuations and inflation), while export earnings generated by tourism have grown to USD 1.7 trillion (+4% compared to 2017). Strong outbound demand from both traditional and emerging markets fuelled growth in global receipts, which follows the positive trend recorded in international tourist arrivals (+5%).By region, Asia and the Pacific (+7%) and Europe (+5%) enjoyed above-average growth in international tourism receipts in 2018. In addition, Europe represents almost 40% of international tourism receipts, followed by Asia and the Pacific with almost one third(30%) in 2018 (UNWTO, 2019).

Leisure travel spending (inbound and domestic) generated 78.5% of direct Travel & Tourism GDP in 2018 compared with 21.5% for business travel spending. Leisure travel spending is expected to grow by 3.9% per year till 2029, while business travel spending is expected to rise by 3.2% per year till 2029. Domestic travel spending generated 71.2% of direct Travel & Tourism GDP in 2018 compared with 28.8% for visitor exports (i.e. foreign visitor spending or international tourism receipts) (WTTC, 2019). In 2018 China remains the world's largest spender, with one fifth of international tourism spending, followed by the United States.

It is clear that tourism is a major force in the world economy, an industry of global importance and significance. The rapid growth of tourism demand requires the adaptation and development of the supply side, thus creating the challenges of sustaining the economic, social and environmental balance at destinations.

Sustainable tourism has become an important concept for destinations and tourism companies alike. They all strive to secure long-term business viability, differentiate themselves from the competition, support local communities, but also to project a positive image to the market, since contemporary tourists appreciate green and sustainable initiatives more than ever before.

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The enormous impact of tourism on the environment, local community and economic development is recognized globally, with large efforts being focused on reduction of the negative impacts and maximising the positive ones. This resulted in recent trends towards sustainability, greening economy, green consumption, environmental concern, social legacy, the popularity of corporate social responsibility principles etc. which are being implemented at many destinations and by individual tourism providers.

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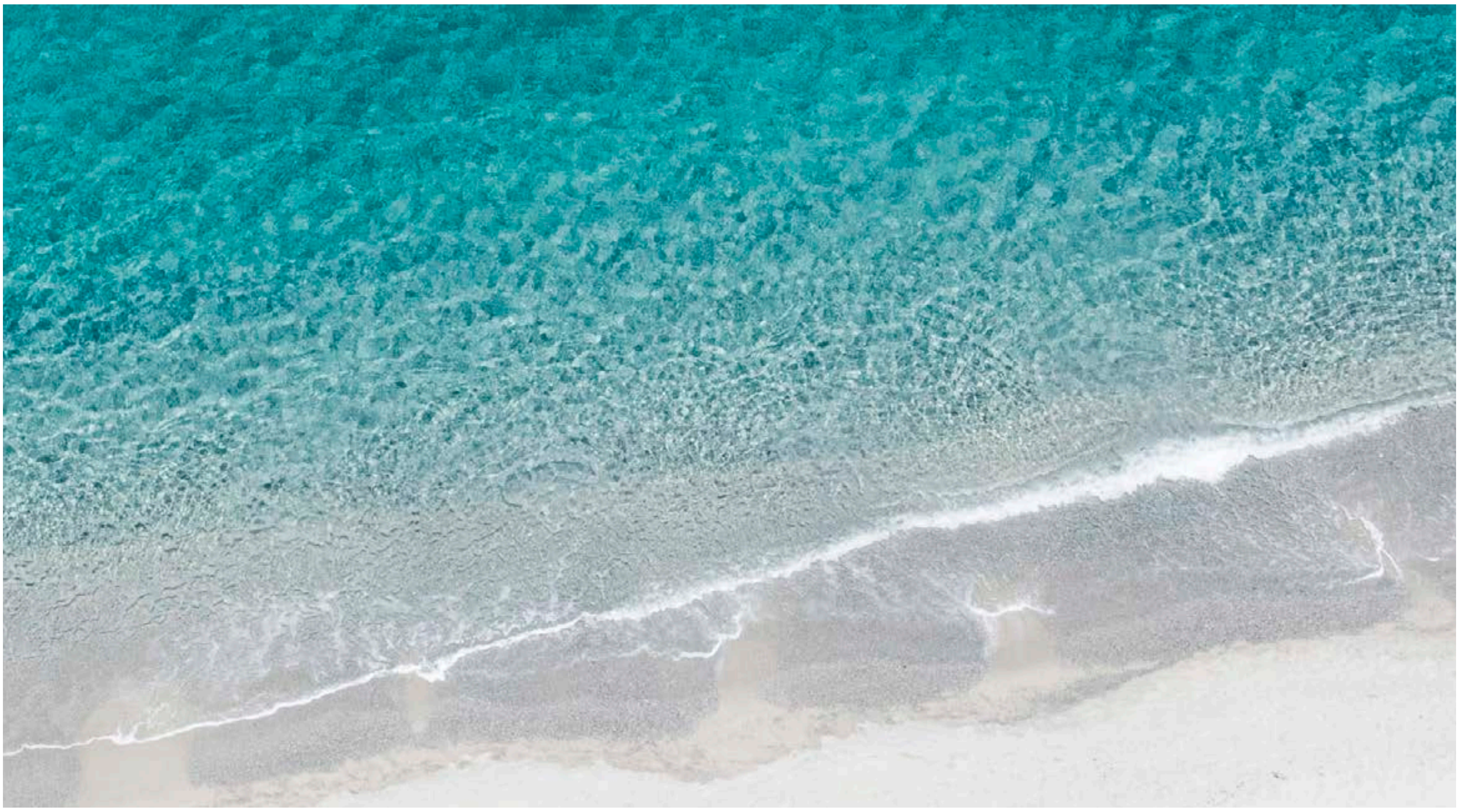

2. THE CONCEPT OF SUSTAINABLE TOURISM

Multifaceted nature of sustainable tourism

Sustainable tourism is tourism that takes full account of current and future economic, social and environmental impacts, addressing the needs of visitors, industry, the environment and host communities. It is not a special form of tourism; rather, all forms of tourism may strive to be more sustainable (UNEP and UNWTO, 2005).

Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

Thus, sustainable tourism should:

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1. **Make optimal use of environmental resources** that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural resources and biodiversity;
2. **Respect the socio-cultural authenticity of host communities**, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance;
3. **Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders** that are fairly distributed, including stable employment, income-earning opportunities and social services to host communities, whilst contributing to poverty alleviation.

2.1 Participatory approach to sustainable tourism development

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and requires constant monitoring of impacts whilst introducing the necessary preventive and / or corrective measures whenever necessary.

Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them (UNEP and UNWTO, 2005).

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A clear distinction should be made between the concepts of ecotourism and sustainable tourism:

"The term ecotourism itself refers to a segment within the tourism sector with focus on environmental sustainability, while the sustainability principles should apply to all types of tourism activities, operations, establishments and projects, including conventional and alternative forms" (www.unep.fr).

The term sustainable tourism describes policies, practices and programmes that take into account not only the expectations of tourists about responsible natural resource management (demand), but also the needs of communities that support or are affected by tourism projects and the environment (supply). International Labour Organization (2010) perceives sustainable tourism as "composed of three pillars: social justice, economic development, and environmental integrity. It is committed to the enhancement of local prosperity by maximizing the contribution of tourism to the destinations economic prosperity, including the amount of visitor spending that is retained locally. It should generate income and decent employment for workers without affecting the environment and culture of the tourism destination and ensure the viability and competitiveness of destinations and enterprises to enable them to continue to prosper and deliver benefits in the long term".

Sustainable tourism thus aspires to:

1) Be more energy efficient and more climate sound (for example by using renewable energy)
2) Consume less water
3) Minimize waste
4) Conserve biodiversity, cultural heritage and traditional values
5) Support intercultural understanding and tolerance
6) Generate local income and integrate local communities with a view to improving livelihoods and reducing poverty
7) Make tourism businesses more sustainable, thus benefiting local communities, raising awareness and supporting the sustainable use of natural resources (UNEP and UNWTO, 2012, p. 1-2).

Developing tourism sustainably is a big challenge for planners and policy makers. The tourism industry faces a multitude of significant sustainability-related challenges. Specific challenges that need to be resolved through the greening of the industry include:

1) **energy and greenhouse gas (GHG) emissions;**
2) **water consumption;**
3) **waste management;**
4) **loss of biological diversity;**
5) **effective management of built and cultural heritage; and**
6) **planning and governance (UNEP and UNWTO, 2012).**

The United Nations declared 2017 the International Year of Sustainable Tourism for Development. In the context of the universal 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs), the International Year has promoted the change in policies, business practices and consumer behaviour towards a more sustainable tourism sector (UNWTO, 2017).

The new Agenda 2030 for Sustainable Development, also recognizes the need for development and implementation of tools, necessary to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.

In line with 2030 Agenda for Sustainable Development and the United Nations (UN) Sustainable Development Goals (SDGs), and the UAE vision 2021, Dubai plan 2021 aims to "deliver one of the most sustainable World Expos in history" and to support sustainable tourism development, while Expo 2020 Dubai focuses on four key objectives:

1) **Leave a legacy of sustainable infrastructure and cutting-edge sustainability practices**
2) **Catalyse sustainability efforts in Dubai and the UAE**
3) **Increase public awareness and engage society about sustainability principles and sustainable living**
4) **Develop sustainability solutions that are scalable, extending benefits to the wider economy (Expo 2020 Dubai Sustainability Report 2018).**

2.2 Growing trend of concious consumerism

Among the 66% of global respondents willing to pay more, over 50% of were influenced by key sustainability factors, such as: a product being made from fresh, natural and/or organic ingredients (69%), a company being environmentally friendly (58%) and company being known for its commitment to social value (56%) (The Nielsen Company, 2015)

In the last two decades a growing body of evidence shows increasing focus on sustainability and corporate responsibility initiatives, sustainable lifestyles, green products and green topics in general.

Increasing interest in sustainable consumption and sustainable development, imposed the need to define sustainable lifestyle and market segments related to it.

In 2007 Natural Marketing Institute (NMI) conducted a comprehensive study of the consumer insights into the role of sustainability, health, the environment and social responsibility in the U.S. market. The results showed that 41 million (or 13% of Americans) were so called LOHAS consumers - Lifestyles of Health and Sustainability. The study also showed that this marketplace is very opportunistic and will remain so, and that sustainability concerns are unlikely to diminish over the coming years. This trend should not be ignored (NMI, 2008).

The Lifestyle of Health and Sustainability market segment, more than any other, was interested in sustainable living, green, ecological initiatives and was generally composed of a relatively upscale and well-educated population. It is a recognised market segment in the USA, Western Europe and Asian countries. In the LOHAS Journal (published by Natural Business Communications), the LOHAS market is described as "a marketplace for goods and services that appeal to consumers who value health, the environment, social justice, personal development and sustainable living" (Everage, 2002).

According to the Nielsen Company, which carried out an online survey of 30,000 consumers in 60 countries in 2015, "sustainability is a worldwide concern that continues to gain momentum—especially in countries where growing populations are putting additional stress on the environment." "An increasing number of consumers in developed regions consider sustainability actions more of an imperative than a value-add" (The Nielsen Company, 2015)

Nielsen concluded: ''Consumer brands that demonstrate commitment to sustainability, outperform those that don't''. Sales growth of companies with a demonstrated commitment to sustainability werefour times higher than that of competitors; 4% compared to less than 1%. Overall, results confirm that the market for sustainable products continues to expand. There are of course variations by region, demographics and category. But it is clear that on a global scale, commitment to social and environmental responsibility is surpassing some of the more traditional influences for many consumers. Brands that fail to take this into account will likely fall behind.

According to the Nielsen Global Survey of Corporate Social Responsibility and Sustainability 2015, 66% of global consumers were willing to pay more for sustainable brands - up 55% from 2014, whilst 73% of global millennials were willing to pay extra for sustainable offerings - up from 50% in 2014

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Sustainability factors that influence purchasing 2015	%
The products are made by a brand/company that I trust	62
The product is known for its health & wellness benefits	59
The product is made from fresh, natural and/or organic ingredients	57
The product is from a company known for being environmentally friendly	45
The product is from a company known for its commitment to social value	43
The product's packaging is environmentally friendly	41
The product is from a company known for its commitment to my community	41
I saw an ad on television about the social and/or environmental good the product's company is doing	34

Table 1. The list of sustainability factors that influence purchasing 2015
Source: The Nielsen Global Survey of Corporate Social Responsibility and Sustainability 2015

In addition, the findings from 2015 also show that it is generally harder to influence consumers in the developed markets to purchase or pay more. Consumers in Latin America, Asia, Middle East and Africa are 23%-29% more willing to pay a premium for sustainable offerings. Similar results were found in 2014.

Global consumers are willing to pay more for sustainable brands	2014	change in % from 2011
Global average	55%	+10
Asia-Pacific	64%	+9
Latin America	63%	+13
Middle East/Africa	63%	+10
North America	42%	+7
Europe	40%	+8

Table 2. Global consumers are willing to pay more for sustainable brands (2014)
Source: The Nielsen Company, 2014

2.3 The rise of the environmentally-minded tourist

According to UNWTO (2019), raising awareness on sustainability is one of top consumer travel trends.

Global Data's 'Top trends in sustainable tourism' 2017 report also emphasized the sustainability trend and the rise of responsible travellers.

These travellers are more likely to choose eco-tourism holidays and to support businesses and brands that are committed to social values and respect the environment.

According to Global Data's Q4-2016 consumer survey, 35% globally are likely to book eco-tourism holidays. The countries that present the biggest interest in eco-tourism are Malaysia (76%), followed by China (67%) and Turkey (65%).

Global Data's 'Top trends in sustainable tourism' 2017 report also emphasized the sustainability trend and the rise of responsible travellers.

The higher the household income of respondents, the greater the likelihood to book an eco-tourism holiday.

Whereas 16% of Americans with a household income between $20,000 and $34,000 per annum were likely to book an eco-tourism trip, 57% of those whose income exceeds $150,000 said the same.

The findings from this survey suggest that changing consumer perceptions across all income segments create opportunities to combine different types of travel. For instance, luxury and eco holidays traditionally belonged at the opposite ends of the tourism industry. However, the renewed interest from the most affluent on eco-holidays has given rise to the new type of travel, known as luxury ecotourism.

According to Global Data's Q4-2016 consumer survey, 35% globally are likely to book eco-tourism holidays. The countries that present the biggest interest in eco-tourism are Malaysia (76%), followed by China (67%) and Turkey (65%). The higher the household income of respondents, the greater the likelihood to book an eco-tourism holiday.

The sustainability trend "presents opportunities for airlines, hotels, tour operators and tourism boards to differentiate the products and services they offer on the basis of sustainability and hence attract more customers.

In that way, sustainable tourism is seen as a win-win situation as it can be both financially profitable, as well as socially responsible." (Global Data, 2017)

From 2016 to 2019, Booking.com, one of the world's leading digital travel platforms, conducted research and released findings in its annual Sustainable travel report, each year on 22 April - Earth day. According to the Booking.com's reports, across 11 markets, with over 1,000 respondents in each, the term 'sustainable travel' means many things to many people, but the role of accommodation in helping travelers to achieve their sustainable travel goals is clear.

The sustainability trend "presents opportunities for airlines, hotels, tour operators and tourism boards to differentiate the products and services they offer on the basis of sustainability and hence attract more customers.

Luxury and eco holidays traditionally belonged at the opposite ends of the tourism industry. However, the renewed interest from the most affluent on eco-holidays has given rise to the new type of travel, known as luxury ecotourism.

What does term ‘sustainable travel’ means to global travellers?	%
Staying in eco-friendly accommodation	56
Conserving water by reusing towels and bed sheets	38
Conserving the environment by reducing use of amenity goods such as shampoo, soap, toothbrush, shaving razor	35
Buying of locally-made products and supporting local artisans	38
Choose an eco-friendly accommodation because it provides a more locally-relevant experience	36

Table 3. What does term ‘sustainable travel’ means to global travellers?
Source: Booking.com, 2017

All the above mentioned, indicates that tourists are aware of the fact that they need to be more responsible towards the environment and local communities in order to make their travel more sustainable.

It is also important to differentiate between the term “sustainable” and “responsible” tourism. In his book “Responsible tourism - Using tourism for sustainable development”, Howard Goodwin (2016) explains that responsible and sustainable tourism are not the same things.

Responsible tourism places an emphasis on what individuals and groups do to address sustainable issues which arise in particular places, addressing local priorities, transparently reporting what is being done to address local priorities.

Sustainable and responsible tourismis about making all tourism forms and activities more responsible.

Culturally responsible tourism is a component of responsible tourism that ‘contributes to mutual understanding and respect between peoples and societies’.

Responsible tourism places an emphasis on what individuals and groups do to address sustainable issues which arise in particular places, addressing local priorities, transparently reporting what is being done to address local priorities.

He also emphasizes that tourism may be unsustainable for many reasons, some of which are more easily addressed than others. Some can be resolved through individual decisions by consumers and producers. At the core of responsible tourism is the ethics of responsibility: everyone involved in tourism taking responsibility to make it more sustainable. It is also important to understand that sustainable and responsible tourismis about making all tourism forms and activities more responsible.

Culturally responsible tourism is a component of responsible tourism that ‘contributes to mutual understanding and respect between peoples and societies’.

Respect for local culture is advocated, as well as respect for ethical values, diversity, religion, customs, moral beliefs and social traditions. Culturally responsible tourism requires culturally responsible behaviour that is referred to as being aware of and sensitive to cultural values, traditions and customs of a foreign society, whilst complying with the rules of behaviour and ways of life of the host society to match the host society’s expectations. A culturally responsible tourist learns about cultural differences through verbal and non-verbal communication cues; food, dance, human interactions, religious beliefs, forms of address, manners, gestures or time orientations. Although these are cultural elements that have potential grounds for cultural misunderstanding and conflict between international tourists and locals, some tourists may wish to experience them. Tourists may be motivated to travel by the cultural uniqueness of the foreign tourism product. A culturally responsible tourist also understands how his/her behaviour may influence the experiences and feelings of the host community (Pennington-Gray et al., 2005).

With regard to tourist destinations, an important issue is also responsible destination marketing in order to attract the responsible tourists. Destinations are a complex amalgam of tourism products and services and are thus required to balance a varied set of attributes, stakeholders, and actors in the co-creation of tourist experiences, whilst simultaneously engaging with the sustainability agenda (Fyall, Garrod et al., 2012).

The marketing of sustainable attributes can enhance destination competitiveness and make destinations more attractive (Fjelstul, 2014).Destinations enjoy many benefits from attracting responsible tourists, who not only contribute to the local economy but also take care of the environment and help safeguard local culture.

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3. PROFILE OF THE SUSTAINABLE TOURISM CONSUMER

3.1 Global trends driving sustainable tourism demand

A number of closely related global trends drive global consumer demand for sustainable tourism. They can be identified as follows:

Millennials (born from the early 1980s to 2001) continue to be the most willing to pay extra for sustainable offerings (73%)

1. Demographic changes - Age matters

According to the Nielsen Global Survey of Corporate Social Responsibility and Sustainability 2015, Millennials (born from the early 1980s to 2001) continue to be the most willing to pay extra for sustainable offerings (73%), up from 51% in 2014. The rise in the percentage of respondents under 20, also known as Generation Z, who are willing to pay more was equally strong—from 55% of total respondents in 2014 to 72% in 2015. Fifty-one percent of Boomers (50-64) are willing to pay extra, an increase of 7% since last year. This segment remains a substantial market in the coming decade for sustainable products.

"Brands that establish a reputation for social responsibility and environmental stewardship among today's youngest consumers have an opportunity to not only grow market share but build loyalty among the power-spending Millennials of tomorrow (The Nielsen Company, 2015).

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	Generation Z (under 20)	Millennials (21-34)	Generation X (35-49)	Baby Boomer (50-64)	Silent generation (65+)
Pay extra for sustainable products	9%	51%	25%	12%	3%
Check the packaging labels to ensure positive social/ environmental impact	10%	51%	25%	12%	2%
Prefer to work for a sustainable company	9%	49%	26%	13%	3%

Table 4. Demographic segments of sustainably engaged global consumers - Millennials are the most responsive to sustainability actions
Source: The Nielsen Company, 2014

Baby Boom generation (those born between 1946- 1964) are largely entering the retirement stage and find themselves with more leisure time. They are also living longer than earlier generations and prize active lifestyles more, including a long-haul travel.

Many of the "Gen-X" (those born between 1961–1981) are environmentally conscious and have embraced green consumerism (CREST, 2009).

The "Gen-Y" or 'Millennials' are extremely well informed and passionate about environmental and social justice issues. General trends show that Millennials are the most eco-conscious consumers, hence driving the need for support of sustainable practices from an array of industries.

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According to Booking.com (2019a) research, Gen Z are determined to give back, making them the generation most interested in volunteering as a travel experience (37% vs 31% of global average). Half (52%) of Gen Z travellers that have not volunteered before would be open to doing it on a future trip (57% female vs 48% male) and almost half of Gen Z stated that, they believe it is important for them to give back to the local community when traveling (44%).

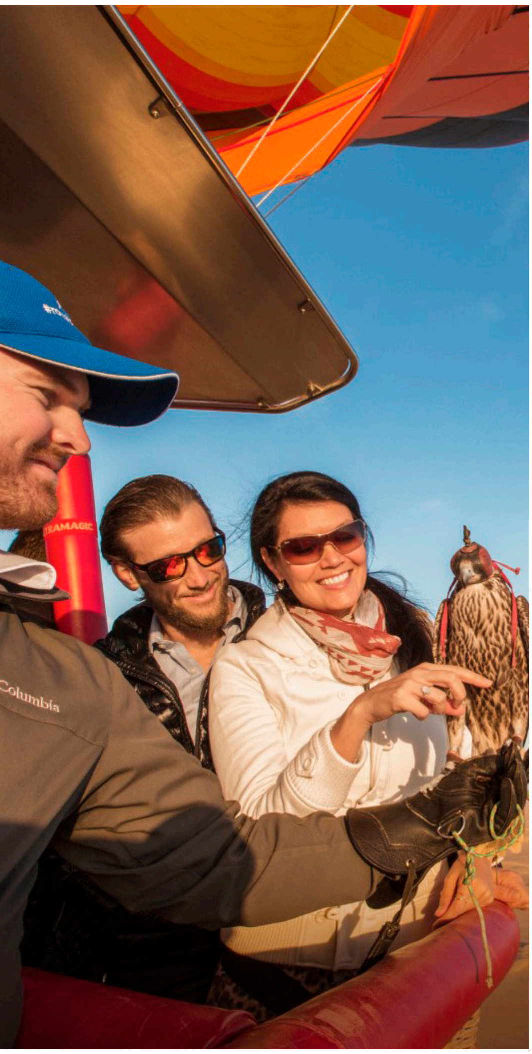
Many of the "Gen-X" (those born between 1961–1981) are environmentally conscious and have embraced green consumerism (CREST, 2009).

Global Data's 'Top trends in sustainable tourism' 2017 report also found that Millennials are leading the way in sustainable tourism, they are the most interested in booking an eco-tourism holiday(Global Data, 2017).

2. Need to reconnect with nature

People living in urban areas are seeking to spend their leisure time in areas where they can ‘reconnect with nature’. Hiking, camping, wildlife viewing, cycling and other outdoor/adventure activities or holidays offer a chance to escape from urban environments, busy work lives and to reconnect with nature (CREST, 2009).

3. Demand for experiences



In contrast with traditional mass tourism and ‘sun, sea, sand’ tourism phenomenon, modern consumers now seek specific experiences as part of their habitual consumption patterns. UNWTO ranks “experiential tourism”, as the fastest growing among the tourism sectors, in the next two decades (CREST, 2009).

Sustainable tourism products such as ecotourism, nature, heritage, cultural, and soft adventure tourism, as well as rural and community tourism, tend to stress experiences over facilities and comfort. These products are taking the lead in tourism markets and are predicted to grow most rapidly over the next two decades.

It is estimated that global spending on ecotourism is increasing at a higher rate than the industry-wide average. Nature-based tourism is an important economic component of the entire tourism market, including 75% of Australia’s international tourism, US$ 122.3 billion in the United States of America in 2006, and 42% of European recreational tourists in 2000 (UNWTO, 2010). In the U.S. during 2017, “The National Park System received an estimated 331 million recreation visits. Visitors to National Parks spent an estimated $18.2 billion in local gateway regions (defined as communities within 60 miles of a park). The contribution of this spending to the national economy was 306 thousand jobs, $11.9 billion in labor income, $20.3 billion in value added, and $35.8 billion in economic output” (Thomas, Koontz, & Cornachione, 2018). Adventure experiences, like wild life safaris, are very popular among international visitors in South Africa. In Australia, the revenue from ecotourism activities reached $ 1.1 billion in 2016 (Altunel & Bugday, 2019).

Tourists seeking environmental and culturally differentiated destinations are willing to pay more for such experiences.

Tourists seeking environmental and culturally differentiated destinations are willing to pay more for such experiences.

WEF (2009) estimates that 6% of the total number of international tourists pay extra for sustainable tourism options and 34% would be willing to pay extra for them (UNEP & UNWTO, 2012).

4. Demand for authenticity

Modern consumers want authentic experiences. Contrived, staged experiences, created by tour operators, theme parks, cruise companies, resorts, and so on, that are based largely around consumption – shopping, gambling, etc. – and manufactured or mass produced entertainment, are no longer favoured by a growing number of travellers. Instead, they want to see 'the real thing' and are savvy enough to easily tell the difference (CREST, 2009).

According to 2019 Sustainable travel report, by Booking. com (2019b), 72% of global travellers are seeking authentic experiences that are representative of the local culture. Gen Z is the generation most likely to want to volunteer when traveling (37%), as they believe it makes a trip more authentic because they get to meet local people and feel like they've made a difference (49%)(Booking. com, 2019a).

5. Going green

Going green in travel and tourism sector is a trend growing in parallel with the growing consumer demand for products that are perceived as "organic", "sustainable", "environmentally friendly", "green", "fair trade", or any other term that implies care for the environment. In addition, a growing number of clients in North America and Europe demand and expect the travel companies they use to implement responsible business practices (CREST, 2009).

According to Booking.com (2019) Sustainable travel report, sustainable stays are growing in popularity.

Additionally, 70% of global travellers say they would be more likely to book an accommodation knowing it was eco-friendly, whether they were looking for a sustainable stay or not.

However, when it comes to recognizing a sustainable place to stay, almost three quarters (72%) of global travellers say that they are not aware of the existence of eco-labels for vacation accommodations, while well over a third (37%) of them that an international standard for identifying eco-friendly accommodation would help encourage them to travel more sustainably, and 62% would feel better about staying in an accommodation if they knew it had an eco-label.

In connection to this, the research of Booking.com (2017) was also focused on finding out why global travellers choose eco-friendly accommodations. The results indicate several main reasons, which could be also useful for future marketing of eco-friendly establishments.

Year	%
2019	73
2018	68
2017	65
2016	62

Table 5. Increase in % of global travellers intending to stay at least once in an eco-friendly accommodation
Source: Booking.com, 2019

Reasons	%
To help reduce environmental impact	52
They provide a more locally-relevant experience	36
They treat the local community better	31
They tend to provide more locally-sourced/organic food	30
An interest in experiencing new trends in travel accommodations	24

Table 6. Top-5 reasons global travellers choose eco-friendly accommodations
Source: Booking.com, 2017

6. Search for fulfilment

From Baby Boomers to Gen Z, consumers seek authentic, 'green' experiences, as an escape from the stress of urban life, but also a deeper meaning in vacation experiences.

They want to make a positive contribution to the local people and environment either through financial support for local projects, or through volunteer opportunities.

According to Booking.com (2019a) research, Gen Z are determined to give back, making them the generation most interested in volunteering as a travel experience (37% v 31% of global average). Half (52%) of Gen Z travellers that have not volunteered before would be open to doing it on a future trip (57% female v 48% male) and almost half of Gen Z stated that they believe it is important to them to give back to the local community when traveling (44%).

From Baby Boomers to Gen Z, consumers seek authentic, 'green' experiences, as an escape from the stress of urban life, but also a deeper meaning in vacation experiences.

3.2 Who are the consumers of sustainable tourism products?

Past research shows, that travellers can always be placed somewhere on the continuum from the concerned to 'could-not-care-less', and from those seeking 'the real and authentic' to those seeking the opposite. However, nowadays, more than ever, trends go towards more ethical awareness and a greater willingness to take responsibility for the impacts of tourists and the tourism industry and the pursuit of real authentic experience (Goodwin, 2016).

Consumers' expectations of the responsible elements of their holiday and the authenticity and quality of their experience have risen, resulting in different aspirations for a real holiday.

Consumers' expectations of the responsible elements of their holiday and the authenticity and quality of their experience have risen, resulting in different aspirations for a real holiday. Goodwin (2016) also explains that, these aspirations affect what sells and what does not, and that most decisions about purchases are now multi-faceted. The prices are still important, but some factors became even more important-perception of quality and authenticity, less commodified goods and services, trustworthiness of the supplier, etc.

Booking.com report (2018), indicates that the green travel trend continues to gain momentum with a large majority of global travellers (87%) stating that they want to travel sustainably, and nearly four in 10 (39%) confirming that they often or always manage to do so.

However, 48% indicate they never, rarely or only sometimes manage to travel sustainably, suggesting that while promising strides are being made for a greener future, there is still plenty of room to turn intentions into action.

According to Mintel (2003) report on eco and ethical tourism, the following consumer typology is considered to be useful in creating tourism market segments regardless of the nationality of consumers:

The prices are still important, but some factors became even more important-perception of quality and authenticity, less commodified goods and services, trustworthiness of the supplier, etc.

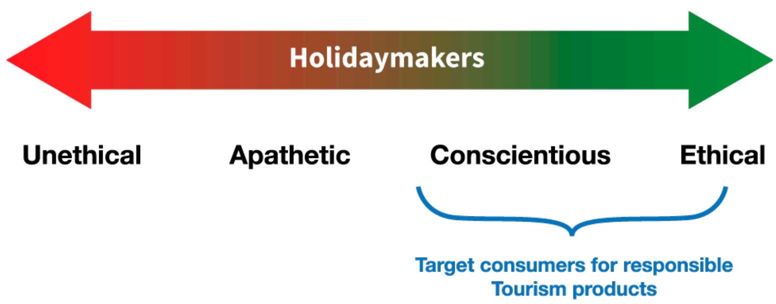
Unethical holidaymakers: Those who just want to relax on their holiday and are not concerned with ethical issues.

Apathetic: Those who don't think about ethics while on holiday and who do not have any particular response to attitudinal statements with regards to ethical holidays.

Conscientious: Those who try to learn about the local cultures they might visit.

Ethical tourists: Those who are most likely to be concerned about ethical issues while on holiday.

Figure 1. Consumer typology



Source: CREST, 2009 by Mintel 2003

Based on this typology, the main market for sustainable tourism products are those consumers who fall under the conscientious and / or ethical typology. According to Mintel and other studies, Conscientious and Ethical Travelers differentiate from the Unethical and Apathetic Travelers. They are increasingly seeking experiences, fulfilment, and rejuvenation rather than just visiting places and things. These consumers have a higher than average social consciousness and therefore seek interactive holidays that provide an enriching experience quite distinct from their day-to-day lives. Personal satisfaction and experiences are becoming more important and consumers are more independent, involved, and discriminatory in the itinerary planning process (CREST, 2009).

Literature emphasizes several key attitudes/elements which are common among all consumers of sustainable tourism products regardless of their country of origin:

1. Experienced, Respectful, Interactive and Experiential

Sustainability-engaged tourists tend to be experienced travellers, and, although they may have gone to a beach resort or on cruise holiday before, they are looking now for vacations that are "different and stimulating."

They are "interactive travellers" who participate in travel planning, and are curious about other cultures and environments, and want to connect with others, make friends, and develop personal relationships while on holiday. They are respectful and tolerant toward other cultures, local traditions, politics, religious beliefs, as well as the environment, natural history, and wildlife.

The sustainable tourists strive to use services that benefit the host communities, including accommodation (home stay, B&B, or small lodge), cultural presentations and workshops (cooking, weaving, craft making), cultural performances (music, dance, storytelling), transport (buses, trains, bicycles), and local nature, cultural and historic guides.

Often these travellers seek to challenge themselves – physically, emotionally, and / or mentally - while on holiday. In their search for authentic personal experiences, they are drawn to destinations that are 'off-the-beaten path' and away from the standard tourist routes. They also have cultural and environmental awareness and are more willing to participate in community-based activities (CREST, 2009).

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2. High Social and Environmental Consciousness

Sustainable tourism consumers have an above average social and environmental consciousness. They are:

- more likely to choose a tour company with ethical characteristics such as a written corporate social responsibility code, good working conditions, fair prices, locally sourced food and staff, and revenue sharing with employees, support for community projects and protection of the environment
- willing to pay (modestly) more for companies that are bringing real benefits to people in the host communities
- willing to pay a premium to companies that are involved in protecting environmentally sensitive areas, particularly those consumers who are interested in the nature-based and adventure tourism (CREST, 2009). Similar findings are presented in Booking.com (2019) Sustainable travel report.

Consumers are concerned about the local environments of their travel destinations and are willing to spend more on their holidays if they are assured that workers in the sector are guaranteed ethical labour conditions.

Sustainable tourism consumers have an above average social and environmental consciousness.

In 2007, TripAdvisor surveyed travellers worldwide and 38% said that, environmentally friendly tourism is a consideration when travelling; 38% had stayed at an environmentally-friendly hotel and 9% specifically seek out such hotels, while 34% were willing to pay more to stay in environmentally friendly hotels (Pollock, 2007; UNEP & UNWTO, 2012). Research also indicates that, consumers are concerned about the local environments of their travel destinations and are willing to spend more on their holidays if they are assured that workers in the sector are guaranteed ethical labour conditions in the places they are visiting (ILO, 2010).

3. Travel with a Purpose

Given the high social consciousness amongst sustainable travellers, some want to go a step further and 'travel with a purpose'. This might take place in the form of travellers' philanthropy or volunteer tourism.

Euromonitor reported in 2008, a growing trend among North Americans, who may be time-starved but cash-rich, to take luxury vacations that include some philanthropy along with relaxation. Volunteer tourism is growing rapidly among travellers who want active involvement in the destinations they are visiting.

Volunteer tourism is growing rapidly among travellers who want active involvement in the destinations they are visiting.

There are two main types, 1 - which includes many long-established programs, in which volunteering is the primary activity and 2 - newer variation, which is referred to as 'voluntourism', in which the vacation is primary motive but is mixed with short term volunteer opportunities (CREST, 2009).

Consumers of sustainable tourism products tend to be:

- well-educated
- of all age groups
- evenly spread across both genders, and
- have higher than average (but not excessive) level of disposable income.

3.3 Demographics, travel behaviour, and psychographics characteristics of consumers of sustainable tourism product

a) Demographics

Research conducted by Booking.com (2019), reveals that almost three quarters (72%) of travellers believe that people need to act now and make sustainable travel choices to save the planet for future generations. In both Europe and North America, two age groups – youth and retirees, hold strong positions within the sustainable tourism market. Sustainable travel choices are the most strongly supported by travellers of 46-55 year (74%), and Millennials (71%)

Further, according to the booking.com research, the youth group ranges between 16 to 35 years old. Higher rates of disposable income and trend towards later marriage give this group more freedom to travel.

Youth travellers are very socially conscious and major participants in volunteer vacations. When many young professionals do marry, they are often unwilling to give up their travel lifestyles and so will bring their children on holiday. Increasing number of responsible tour operators are offering tours suitable for young families.

Sustainable travel choices are the most strongly supported by travellers of 46-55 year (74%), and Millennials (71%) (Booking.com, 2019)

Baby Boomers are also a major consumers of sustainable tour packages. These tourists are healthier, sometimes in their early retirement, with generous pensions or savings, and have fewer time constraints. The packages they choose often cost more but offer assurances of well-organized, safe, and hassle-free trips. The majority are more interested in cultural and soft, rather than extreme, adventure travels.

Moreover, a range of findings have been reported with respect to the association of socio-demographics with higher levels of pro-environmental behavioural intentions. Overall, the past literature points to a few personal characteristics that may be useful in the search for a distinct segment of hotel guests who behave in a more environmentally friendly way:

- being older, and female (Galley & Clifton, 2004; Dolnicar&Leisch, 2008; Carrus, et al., 2005),
- being highly aware of environmental issues (Lee&Moscardo, 2005),
- having pro-environmental attitudes (Dolnicar&Leisch, 2008; Carrus et al., 2005),
- being concerned about the environment (Fairweather et al., 2005), and
- feeling morally obliged to behave in a pro-environmental manner (Dolnicar&Leisch, 2008).

Vacation time: Travelers of working age often have less leisure time and are willing to spend money in order to save time while on holidays. Shorter leisure times means shorter but more frequent trips. U.S. workers, in particular, have less vacation time and thus look for opportunities and the convenience to simplify their travel bookings. However, time poverty often prompts people to save up time to spend later, for example, taking sabbatical holidays, or ‹trips of a lifetime› (CREST, 2009).

b) Psychographics

Sustainable tourists tend to be well educated, informed on a range of subjects, selective in their media consumption, and often opinion leaders.

Tech-savvy travellers are also growing, lucrative travel market, relying heavily on media and the Internet for arranging their travels. Increasingly, travellers are visiting websites such as Trip Advisor, to read user generated content, in the form of reviews on places they plan to visit. They travel beyond major cities. They are interested in exotic or "trophy" destinations, locations that have become famous, UNESCO sites and similar (CREST, 2009).

Sustainable tourists tend to be well educated, informed on a range of subjects, selective in their media consumption, and often opinion leaders.

c) Travel behaviour

The research conducted by Weeden (2013) provided some good insights into travel behaviour of responsible tourists.

The characteristics of responsible tourists:

- They prefer to travel independently
- They buy locally made souvenirs and use locally owned shops and restaurants
- They take public transport as much as they can while some avoid air travel, especially on holiday.
- They like to be outdoors on holiday, enjoy nature, walking in the countryside and taking part in outdoor activities.
- When travelling overseas, they try to learn some local phrases and observe cultural norms, especially with regard to their behaviour and what they wear.
- They like to stay in locally owned accommodation, usually a family-run hotel, guesthouse, eco-cabin or organic farm, purchasing local food, and enjoy holidaying off the beaten track.
- They take pleasure in being with family and friends but also like meeting new people and particularly enjoy talking to locals.
- Some travel alone, others travel slowly and a few attend spiritual retreats on holiday.
- Finally, if they travel with a tour operator, they want it to have a responsible tourism code or they buy directly from a company operating out of their intended destination (Weeden, 2013)

The other studies also show that travel behaviour of consumers can range from fully independent travel to partially independent to entirely pre-booked tour packages (e.g. all-inclusive, group travel, school groups, etc.). Sustainable travellers tend to be more independent.

Travel style: The traveller's age, budget, cultural background, and previous travel experience influences the travel style, including choice of tours and activities, style of accommodation, and mode of transport. As with other things in the travel industry, travel styles are constantly evolving and definitions vary from market to market.

When they travel: Both North Americans and Europeans travel during the summer school holiday months (June to mid-September) and around major holidays such as Easter and Christmas. Shorter winter holidays, during the months of December through February, are increasingly popular.

Type of tourists: The research conducted in Slovenia by Cvelbar et al. (2017) revealed certain differences between business travellers and families in the pro-environmental behaviour in hotels. Hotel staff noted that business travellers were always the best in terms of towel reuse because – as opposed to families – they come in clean, spend all day in seminars and do not do any sports. Thus, they have very little need for more than one or two towels. Families, on the other hand, often arrive at the hotel after a long trip, needing a shower or a bath immediately upon arrival. Families also engage in more activities that, in turn, lead to additional showers and baths. Also, families spend much more of their time in the hotel room than business travellers and even couples travelling alone.

3.4 Trends in the main tourism source markets for Dubai

According to Dubai Tourism 2018 - Performance report, the top source markets for Dubai are India, KSA, UK, Oman, China, USA and Russia (DTCM, 2018).

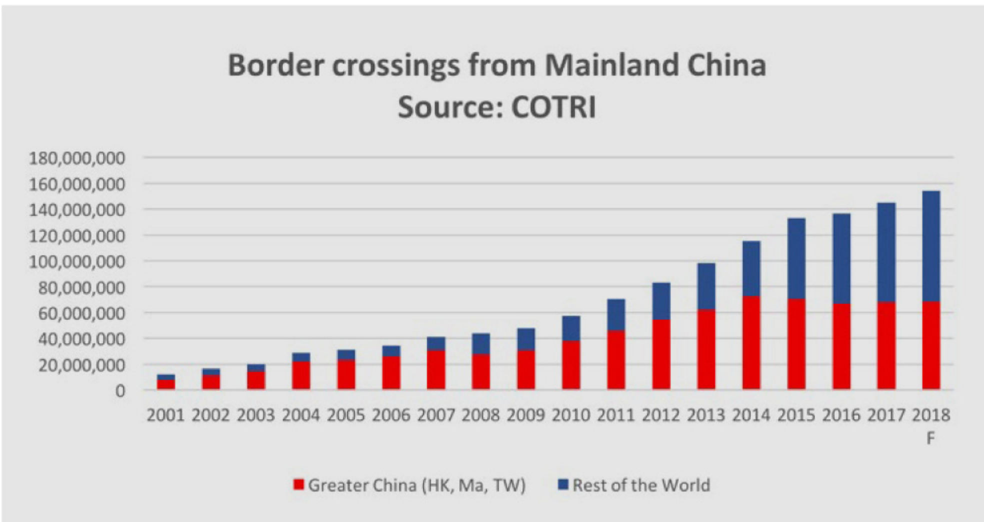
India has emerged as the world's fastest-growing outbound market. Looking at absolute numbers it is second only to China. The number of Indians travelling overseas is predicted to rise to 50 million by 2020. (Economic Times, 2013). The main purpose of visit for Indian tourists are holiday, VFR (Visit Friends & Relatives) and Business (researchandmarkets.com). However, consumer spending in India is in constant change due to emerging middle class in Indian cities. This transformation will create even bigger opportunities for its integration into global economy, enabling sustainable development and greater upward social mobility for Indian consumers (WEF, 2019).

The research conducted by COTRI (China Outbound Tourism Research Institute) in 2018, showed that both the number of Chinese outbound tour-group travellers and independent travellers were on the rise, and there is little difference in spending between group and independent travellers. Within these broad groups, there are a number of segments, such as shoppers, adventure-seekers, culture enthusiasts, escapists and landmark hunters. In particular, younger travellers seek more exotic destinations or unique experiences. Increasing numbers of Chinese tourists, especially millennials, enjoy alternative travel experiences and are willing to spend more on their trips. Preferred travel activities among Chinese tourists are: shopping, especially luxury products, and adrenaline-inducing activities, such as rafting, escape rooms and paintball. In addition, they like to stay in unconventional accommodation, such as a tree house or luxury camp.

For 2018, COTRI predicted the total of 154 million border crossings by Chinese nationals, representing again a 6% year-on-year increase, based on just 1% growth for Greater China and 11% growth for the rest of the world. This means that a total of 86 million journeys representing 56% of all Chinese outbound trips in 2018 were made to destinations beyond Greater China. Therefore, China has reached the undisputable number one position, as the biggest international tourism outbound market even when only trips beyond Greater China are counted.

Even though Mainland Chinese tourists spend serious amounts of hard currency outside the country for often frivolous and unnecessary activities, from helicopter rides to shopping, outbound tourism will not be criticised as "hedonistic" behaviour. Internally, outbound tourism can be used as a way to help the upper 10% of the society to enjoy a level of freedom and "happy spending". In this context, luxury eco-tourism could be a win win scenario for Dubai tourism to attract more Chinese tourists.

Luxury eco-tourism could be a win win scenario for Dubai tourism to attract more Chinese tourists.



Increased interest in certain types of tourism for example rafting, trekking, nature-oriented tourism (Caribbean News, 2019), which is in line with sustainable travel trends globally.

Globally, UK is one of the top five spenders on international tourism. Outbound travel is increasing steadily in the UK along with domestic and inbound tourism. Trips taken as holiday remained the main purpose of travelling for UK outbound tourists in 2016, followed by visiting friends and relatives and business trips. The outbound tourism expenditure of UK travellers crossed US$ 70 billion and is projected to reach US$ 102 billion by the end of 2024. Relatively high disposable income per capita is expected to drive the UK's outbound tourism sector. Baby Boomers are the most important segment of the UK outbound travel sector. The residents of the UK prefer July and August for travel abroad, mainly due to the long school holidays. Other popular months are April, May, June, October and November. January to March is a popular time for a single-week ski trips and winter sun breaks to cheap destinations, usually as an extra holiday. However, factors such as the increase in the price of travelling from the UK due to higher fuel costs and slowness of the economic climate can impact the UK outbound tourism sector. In addition, the threat of terrorism is another factor which is impacting the sector, as travellers are more cautious about the safety level of the destination country (Future marketing insights, 2019).

The Russian Federation is currently one of the world's fastest growing outbound travel markets, and this growth seems set to continue. Russia is among the top ten countries with the highest expenditure of their citizens for holidays and travel abroad. The most popular countries among Russian tourists are: Turkey, Thailand, Italy, Spain, UAE, China, Germany, Greece, Cyprus, and Tunisia. About 42 million Russians travelled abroad in 2017, including 15 million for tourism purposes. From January to September 2018, 2 million more tourists travelled to foreign countries compared to the same period in 2017. In general, Russian tourists are a high-spending group. Between 2016 and 2017, Russian travelers spent $1,676 per one trip – more than European travelers who spend $1,174. At the same time, 51% of the budget is spent before the trip, and 49% – at the place of destination. 70% of Russians use bank cards when they plan their travel trips. In 2018, NAFI research center published that 61% Russians who plan long-distance travels use the Internet to look for relevant information about a city or country where they are going to go. In addition, most Russian tourists (66%) buy tickets online. More than half of Russians (55%) pay for accommodation (hotel, house renting) during long-distance travels online (Tourism Review, 2019; Russian Marketing and Advertising Agency, 2019) Russian tourists have high expectations when it comes to service. They expect punctuality and extensive knowledge from instructors and tour guides. Unlike tourists from many European countries, a sizeable percentage of Russian tourists don't speak fluent English. This means they require Russian-speaking services such as audio guides, signs, menus, wait staff, instructors, guides, etc. to make them feel at ease. Their average length of stay for a foreign holiday is 10 nights. Russians are travelling more with their children, with 2018 seeing a 17% increase in family holiday bookings, and specifically beach and ski holidays. They are looking for child-friendly resorts and accommodation, and entertainment for all the family while on holiday. Amongst Russian travelers, there is increased interest in certain types of tourism for example rafting, trekking, nature-oriented tourism (Caribbean News, 2019), which is in line with sustainable travel trends globally.

Several conclusions can be drawn. First off, we believe that the responsible Dubai visitor will most likely fall into two age categories; a young person, aged16 to 35, or an older person, aged46 to 65. We expect that these age groups (Millennials and Baby boomers) will both be environmentally aware and with pronounced pro-environmental attitudes. However, they might differ in their travel habits - how they travel, where they stay and what activities they pursue on their trips. Specifically, older responsible visitors of Dubai might travel with someone, choose more pricy packages, book through travel agencies, stay in the hotels and pursue cultural and soft activities. On the other hand, millennials will probably travel alone, stay in cheaper accommodation, be more adventurous, would rely on technology more, more likely organise their travel by themselves and would volunteer more at the destination. As for gender impact, we expect that women will be more responsible than men. As for their country of origin, we believe that more responsible tourists will come from the US and western European countries such as UK, while tourists coming from China, India and Russia might show lesser tendencies towards environmentally responsible behaviour. The empirical research will also include section on media channels tourists used before their trip to Dubai (to find information in order to plan a trip and book services), during and after the trip to Dubai (sharing experiences). Based on the results, the messaging recommendations will be provided.

4. SUSTAINABILITY MARKETING IN TOURISM

4.1 Profile of the sustainable tourism consumer

A detailed overview of the sustainable tourism consumer profile and related consumer behavior has been discussed in the above sections.

4.2 Marketing to the conscious consumer

Extensive research on both consumers and brands argue in support of the sustainability concept in marketing (Lim, 2016). It is evident that sustainability commitments and achievements made by companies, provide a valuable opportunity to better connect with consumers and achieve marketing goals (Retail industry leaders Association, 2015).

Sustainability marketing is sometimes referred to as green marketing and as such, is generally considered to be environmentally responsible marketing (Brackett and Carr II, 2015). Based on discourse analysis conducted on nearly 200 published journal articles, Kemper and Ballantine (2019) outline three approaches to sustainability marketing:

1. **Auxiliary sustainability marketing** - focusses on the sustainable product (how it was made, e.g. child labour or water use; what are its characteristics and performances, e.g. chemicals it contains; and exposures and risks, e.g. non-toxic paint). This approach includes sustainability integration throughout the whole marketing mix.
2. **Reformative sustainability marketing** - extends the auxiliary approach through the promotion of sustainable lifestyles and behavioral changes. It starts from the fact that current consumption levels are unsustainable and that marketing helps in the process by promoting more consumption. In that sense, consumers are strongly recognized as leaders for change, and thus consumer demand is seen as a reason to engage in sustainable activities.
3. **Transformative sustainability marketing** - further extends two previous approaches through the need for transformation of current institutions and norms towards a sustainable society. Transformative sustainability marketing views responsibility as lying with both companies and consumers and thus needing positive collective citizen action.

In essence, sustainability marketing can be seen as activity that "uses marketing skills and techniques to good purpose, by understanding market needs, designing more sustainable products and identifying more persuasive methods of communication to bring behavioural change" (Font and McCabe, 2017, 1).

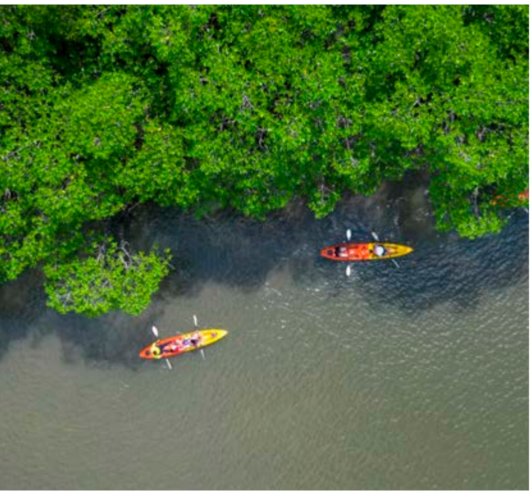
Two broad approaches can be identified in sustainability marketing:

- **Market development** - aims to increase sustainability-driven consumerism by selling sustainable products to a small but growing market. Here, the efforts are focused on changing the behavior of the consumer in a way that they purposefully choose more sustainable products
- **Product development** - aims to design and market products that are incrementally more sustainable to the entire market (Font and McCabe, 2017).

In essence, sustainability marketing can be seen as activity that "uses marketing skills and techniques to good purpose, by understanding market needs, designing more sustainable products and identifying more persuasive methods of communication to bring behavioural change" (Font and McCabe, 2017, 1).

Based on the starting points presented above, the following section will elaborate the issues related to marketing sustainable tourism products and media channels and messaging in sustainable marketing in tourism.

4.3 Marketing sustainable tourism product



The marketing communications of tourism destinations have an important role when it comes to the concept of sustainability.

Sustainability efforts of destination and tourism industry stakeholders should be communicated, recognized and understandable to tourists.

Well informed, educated and motivated tourists can help in achieving sustainability goals. However, communicating the sustainability agenda effectively can prove to be a challenging task since destinations need to consider not only what to communicate, but how to communicate it (UNEP, 2005).

Whilst approximately 60% of consumers care about sustainability, this does not mean that most of them will act differently. Among those who care, the majority of tourists seek different experiences, but it is worth noting that they are willing to buy 'sustainability' only if there is a clear, personal benefit for them.

Sustainability topics are quite broad and complex as they interconnect multiple aspects of human culture with the biosphere. Therefore, many consumers find verbal explanations about sustainability issues too abstract or too complicated to grasp. For the majority of consumers, the whole concept of sustainability is regarded as eccentric and in many cases, not essential to everyday life (Robertson, 2018; Schroeder, 2013).

Stakeholders involved in sustainable tourism should ideally apply all principles of sustainable practice to their marketing activities and communication (Spenceley, 2012). However, tourism destination management organizations (particularly small and medium-sized enterprises within the tourism industry), have limited resources available to spend on marketing and these resources must be spent in a way that will maximize the revenue.

Hanna, Font, Scarles, Weeden, and Harrison (2018) argue that information exchange on sustainability alone is very limited when attempting to change consumer behaviour as a market development approach. This is backed up by Buckley's (2012) research confirming that spreading awareness of the global impacts of human consumption has done very little in creating a more sustainable society.

When advising sustainability-focused businesses, VisitEngland (2015) points out that it is unlikely that they can survive if they rely only on the small percentage of conscientious consumers. Instead, they recommend a variety of messages to attract people from different consumer types.

Whilst approximately 60% of consumers care about sustainability, this does not mean that most of them will act differently. Among those who care, the majority of tourists seek different experiences, but it is worth noting that they are willing to buy 'sustainability' only if there is a clear, personal benefit for them.

However, when other aspects of a product are perceived equal, sustainability values and actions differentiate a product. Finally, the smallest portion of tourists is the market who genuinely care for the planet and society in a way that they are knowledgeable and willing to do research and to pay extra. Unfortunately, it is unlikely that businesses can rely only on this small percentage (around 10% in the UK) of conscious consumers who are influenced by the good that sustainability initiatives, actions, and practices do for the planet and society.

Thus, communicating sustainability should be focused on the largest market share of consumers, who will only buy a sustainable product or service if they perceive it as better. At the same time, communicating sustainability should not look intimidating to the rest of the market, who are not concerned with sustainability issues and who will not pay extra for it (VisitEngland, 2015).

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4.4 Media channels and messaging

The variety of stakeholders in sustainability marketing in tourism stresses the importance of the correct marketing communication strategy. This situation, consequently, requires a multi-channel marketing approach, as a combination of marketing strategies communicated across multiple online and offline media channels.

A recent Eurobarometer study (2015) of the general tourism market indicates that over half (55%) of Europeans prefer recommendations of friends, colleagues, or relatives, while just under half (46%) mention online websites. A third (32%) of Europeans state that personal experience is important, while 18% state travel agencies/tourism offices are important, followed by free catalogs and brochures (10%). Interestingly, less than one in ten mention social media sites (8%), newspapers, radio or TV (7%) or paid-for guidebooks and magazines (7%).

Various approaches and recommendations apply to sustainability communication in tourism, many of which depend on how we define who sustainable tourism consumers are. Research done by the Natural Marketing Institute in the US showed that LOHAS consumers rely more on popular and specialized magazines as a source of information when compared to general consumers.

"Hard ecotourists" use the Internet more than "soft ecotourists" and spend more time collecting information by using multiple sources (e.g. tourist guides, television documentaries, specialized journals or radio programs). "Soft ecotourists" tend to rely on travel agencies and tour operators for information.

Similarly, LOHAS consumers prefer TV channels related to news and outdoor activities (e.g. National Geographic Channel) (NMI, 2007).

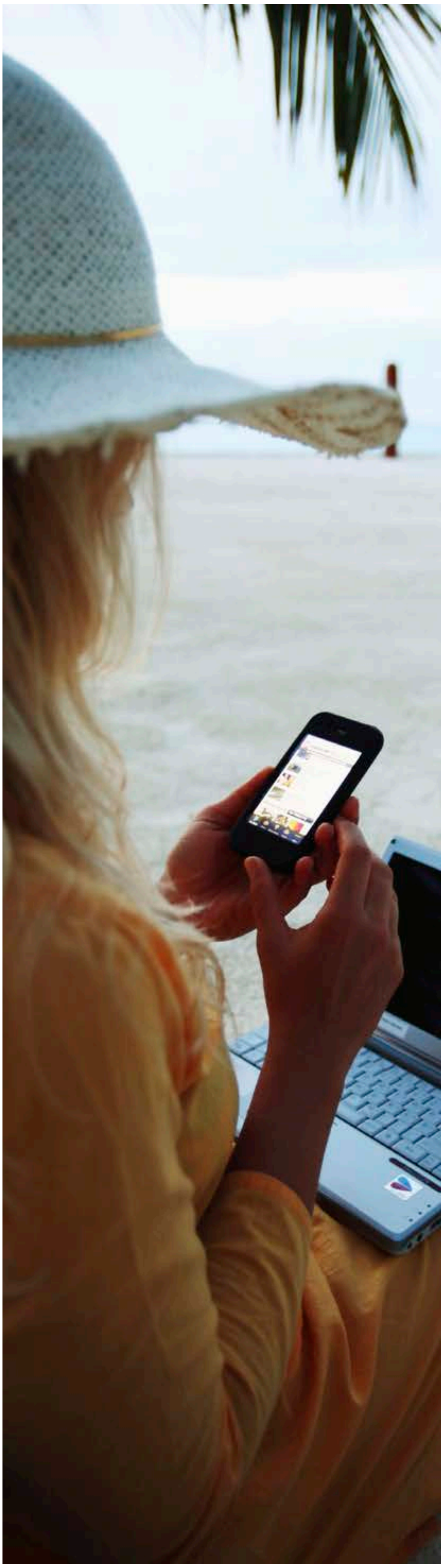
According to Buffa (2015), young Italians with characteristics of "hard ecotourists" use the Internet more than "soft ecotourists" and spend more time collecting information by using multiple sources (e.g. tourist guides, television documentaries, specialized journals or radio programs)."-Soft ecotourists" tend to rely on travel agencies and tour operators for information.

For instance, eco-tourists in Germany prefer using travel agents (52%) as their primary source of travel information, while those from the UK and USA preferred internet travel sites (44%, 55%, respectively) (CREST, 2009).

A growing body of evidence shows that the communication of sustainable tourism management is more effective when offered through interactive channels (Camilleri, 2018). In the case of sustainable consumption, social media could effectively educates and engages youth, especially ethically-minded target groups. It can also provide a platform for organizations' in the field of relationship management and shared experiences (Ali, Frew, 2013; Strähle and Gräff, 2017).

Furthermore, geographical market segmentation is of great importance for how tourists source travel information.

For instance, eco-tourists in Germany prefer using travel agents (52%) as their primary source of travel information, while those from the UK and USA preferred internet travel sites (44%, 55%, respectively) (CREST, 2009).



It concluded that sustainability marketing could have a greater impact if messages are more focused on consumer experience.

In terms of messaging, Hanna, Font, Scarles, Weeden, and Harrison (2018) explored issues of sustainability in tourism towards a specific destination marketing material with either a focus on pleasure and experience, or focus on sustainability. This study, based on prospective UK tourists, found that sustainability is often rejected by consumers.

It concluded that sustainability marketing could have a greater impact if messages are more focused on consumer experience.

Sustainability marketing should also consider different phases of travel. Every travel phase requires a different type of message communicated to tourists.

While in the browsing phase, effective messaging related to sustainability should focus on creating a good impression. On arrival and during their stay, tourists should be convinced that a business is genuinely committed to sustainability and not based on greenwashing. Finally, after the visit, the tourist should be engaged and encouraged to send a message to the world (VisitEngland, 2015).

While in the browsing phase, effective messaging related to sustainability should focus on creating a good impression. On arrival and during their stay, tourists should be convinced that a business is genuinely committed to sustainability and not based on greenwashing. Finally, after the visit, the tourist should be engaged and encouraged to send a message to the world (VisitEngland, 2015).

The need for further empirical research

Sustainability marketing in tourism is an emerging field of study, and a lot more research is required to gain a better theoretical and practical understanding of the matter and all related challenges.

Lim (2016) pinpointed several weaknesses that apply to the most notable examples of sustainable marketing success stories:

- They are usually based on multinational companies that heavily exploit the prestige of their brands. In the case of sustainable tourism, environmental claims in marketing could evoke considerable consumer skepticism.
- The concept of sustainability can be applied in the context of consumption of products and business practices, while its role in the consumption of non-manufactured products, such as nature, remains ambiguous.
- Commercial viability and consumer acceptance of sustainability certification remains low because of the lack of empirical testing of its effectiveness.

These gaps are some of the key reasons why sustainability messages have not been as effective as they could be.

According to Tölkes (2018), who provided the first literature review of sustainability communication in tourism, little is known about personal communication channels and message factors that lead to positive consumer reactions.

She also points out a lack of theoretical foundation on information processing and effective message design.

These gaps are some of the key reasons why sustainability messages have not been as effective as they could be.

Little is known about personal communication channels and message factors that lead to positive consumer reactions.

STAGE 1
SECTION A

The tourist profile with a focus on the sustainability-minded tourist market segment

Media channels and messaging recommendations

CHAPTER 2 - EMPIRICAL RESEARCH

THE CENTRE FOR SUSTAINABILITY THROUGH RESEARCH & EDUCATION

CHAPTER 2 - EMPIRICAL RESEARCH
1. METHODOLOGY

This study was designed to measure and describe the sustainability-minded tourist market in Dubai, UAE. Particular attention was paid to tourists' sustainability-awareness, sustainability-focused attitudes, behaviors, psychographics, lifestyle activities and price sensitivity in order to provide readers with the information they need to capitalize on this growing trend and sustainability initiatives in the tourism sector.

Contemporary tourists are more experienced and sophisticated travelers interested in aligning their personal values and lifestyle with their travel behavior. This is why this project's scope extends beyond a typical tourist market study by focusing on tourists' sustainability awareness, lifestyle and values as they ultimately influence ones travel and purchase behaviors.

In order to explore the above, a global online survey was carried out from December 2019 to April 2020.

The online questionnaire was created based on the previously conducted literature review, using Microsoft Office survey form as a research tool. A total of 1160 adult respondents from 84 countries throughout Asia-Pacific, the Middle East, Europe, North America, Latin America, Australia and Africa participated in the survey.

Particular attention was paid to tourists' sustainability-awareness, sustainability-focused attitudes, behaviors, psychographics, lifestyle activities and price sensitivity

The questionnaire was composed of five sections. The first part referred to the socio-demographic characteristics of respondents as well as information about their trip.

Contemporary tourists are more experienced and more sophisticated travelers interested in aligning their personal values and lifestyle with their travel behavior.

The second part referred to Information sources and media channels, including questions about information sources visitors use regularly to plan a trip to Dubai, media channels visitors use to share information about Dubai and visitors' online behavior and attitudes The third part referred to Factors affecting destination choice, as well as the booking mode respondents used when booking their trip to Dubai. Furthermore, the fourth part measured respondents' Travel behavior, including spending patterns and activities they engage in at destination. It also measured activities they regularly engaged in at home and their preferred mode of transport at destination. The fifth part explored the Sustainable practices and responsible travel behaviour of Dubai tourists. The first several questions explored sustainability awareness of respondents, referring to their global concerns, understanding of the sustainability concept and related terminology, as well as their familiarity with certifications and symbols. Furthermore, this part measured Sustainable and responsible tourism practices. Respondents also had an opportunity to self-evaluate their sustainable travel choices, attitudes and sustainable tourism behaviour and finally their price sensitivity.

To obtain better insight into the responsible and pro-sustainable behaviour of hotel guests in Dubai, and to confirm the validity of the the visitor survey findings, hotel employees were asked to evaluate their guests' pro-sustainability behaviours and interest in sustainability initiatives.

The data was processed with the statistical package IBM SPSS 26. The following analyses were carried out: descriptive statistics and frequency analysis, while independent samples t-test, and ANOVA were used for pre-testing the differences between certain respondents' groups. These tests are conducted at a 95% confidence level.

2. SOCIODEMOGRAPHIC PROFILE OF THE RESPONDENTS

In the 1160 visitors sample, male visitors (60.5) are more dominant than female (37.8). The average visitor is fairly young, predominantly in two age brackets: 30-40 and 25-29 years old. Most of the visitors are well educated (bachelor and postgraduates), full-time employed, with average monthly household income being in most cases from 3001-5000 US dollars and 1001-3000 US dollars. Around 60% of visitors are married, while more than a third are single. We see that most of the respondents live in households of 3-4 members. Families without children are the most dominantly represented, followed by families with children who are between 6 and 12 years old (Table 1).

Table 1. Sociodemographic characteristics of the respondents (in %)

Gender	%	Monthly household income	%
Male	60.5	Below 1000 US dollar	14.8
Female	37.8	1001-3000 US dollar	29.3
Prefer not to say	1.7	3001-5000 US dollar	32.2
		Above 5000 US dollar	0.5
		Prefer not to say	4.9
Age	**%**	**Marital status**	**%**
18-24	17	Single	37.3
25-29	24.2	Married	57.5
30-40	39.2	Divorced	3.2
41-55	15.4	Widowed	0.8
56-75	3.3	In a relationship but not married	0.6
76 and above	0.2	Missing data	0.8
Missing data	0.8		
The Highest level of education	**%**	**Number of members in the household**	**%**
Elementary school	1.6	Single household	9.9
High school	11.9	2	17.7
College	18	3-4	45.9
Bachelor	37.2	Above 4	24
Postgraduate	30.5	Missing data	2.2
Missing data	0.8		
Employment status	**%**	**Age of children in the household**	**%**
Student	8.7	No children	35.7
Part-time employed	11.7	Under 6 years old	21.4
Full-time employed	73	6-12 years old	27.5
Unemployed	3.8	13-17 years old	12.7
Retired	2		
Missing data	0.8		

2.1 Information about the respondents' trip to Dubai

Almost two thirds of respondents have visited Dubai more than once. For 70.7% of them, Dubai was a final destination, whilst the rest visited Dubai as a stopover destination. The average length of stay was 2.15 nights.

The majority of visitors opted to stay in hotels (70%), with the highest number of those who stayed in 4 or 5 stars hotels (49.3%). Some visitors also opted for hotel apartments or stayed with friends and family (10.4%). Other types of accommodation were rarely chosen by visitors.

First or repeated visit	%	Accommodation	%
First visit	27.2	4-5 stars hotel	49.3
Repeated visit	72.1	1,2- or 3-stars hotel	20.7
Missing data	0.7	Hotel apartment	12.2
		Airbnb or similar	3.7
		Eco resort	1.9
		With friends or family	10.6
		On the airport	1.2
		Tent	0.1
Final destination/stopover	**%**	**Travel companions (multiple answers)**	**%**
Final destination	70.7	I am travelling alone	28.8
Stopover	28.6	With a friend/relative	39.8
Missing data	0.8	Partner/husband/wife	37.2
		Children under 18	14.8
		Business colleagues	7.1
The average length of stay (in nights)		**Reasons for visiting Dubai**	**%**
2.15 nights, Std. 1.14 (min. 1, max. 15)		Vacation	59.1
		Business	22.7
		Conference, fair, congress or other business events	5.4
		Visiting friends and relatives	10.4
		Medical treatment	0.4
		Missing data	2

Table 2. Information about the trip to Dubai

When it comes to travel companions, the majority of visitors are travelling with a friend, relative or a partner, with a substantial number of those travelling alone (28.8%). Vacation and business are major motives for visiting Dubai. The highest number of visitors travel for vacation purposes (59.1%), whilst one-quarter of them also travel for business (22.7%) or to attend a business event.

Visitor profile

- Quite young, mainly between 25-40 years old
- Highly educated
- Full-time employed, with average monthly household income ranging from 3001-5000 US dollar and 1001-3000 US dollar
- Married
- Families with children between 6 and 12 years of age

Travel behaviour

- Mostly repeat visitors to Dubai
- Short stay (2-3 days)
- Staying in hotels (especially 4-5 stars)
- Travelling mainly with a friend, relative or a partner
- Purpose of travel: vacation and business

3. INFORMATION AND MEDIA CHANNELS

For in-depth insight into information and media channels that would be effective for tourism promotion to Dubai visitor market, the research included:

3.1
Information sources visitors regularly use

3.2
Information sources visitors used to plan a trip to Dubai

3.3
Media channels visitors use to share information about Dubai

3.4
Visitors' online behaviour and attitudes

3.1 Information sources visitors regularly use

Research shows that TV (41.6%) and YouTube (26.2%) are the most used information sources for Dubai visitors. This clearly suggests that those two media channels would be the most effective channels for destination promotion. This is followed by social networking sites (14.7%), search engines (8.8%), and newspapers (7.8%). The other information sources are used in a smaller percentage (Figure 1).

TV (41.6%) and YouTube (26.2%) are the most used information sources for Dubai visitors

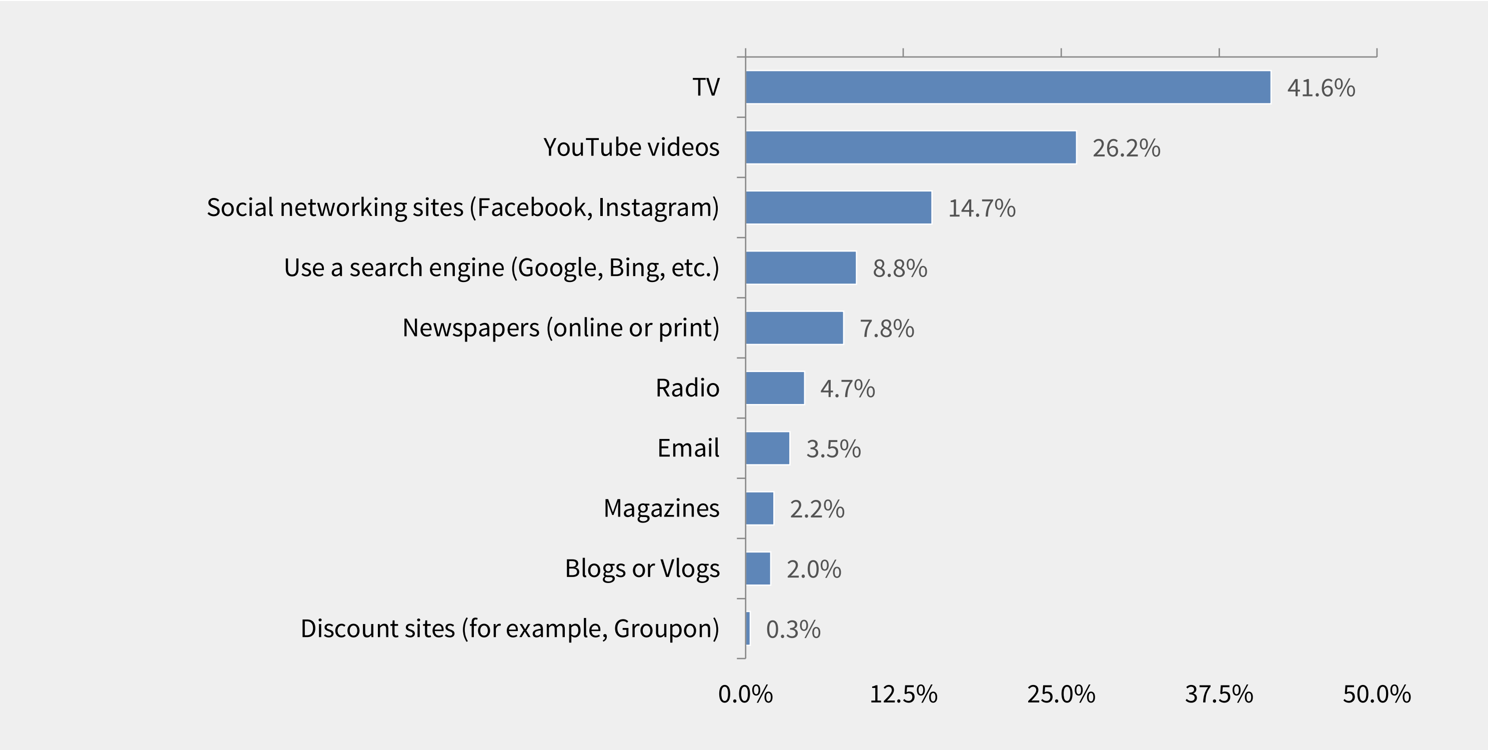


Figure 1. Information sources Dubai visitors use regularly

3.2 Information sources used when planning a trip to Dubai

For Dubai visitors, friends and family are the most dominant information source used to plan their trip (36%). This is closely followed by travel agencies and tourism fairs (21%), and finally social media channels (17%); Promotion through these channels should be intensified.

In addition, booking websites (10%) and the official website 'visitdubai.com' (9%) are widely used by respondents.

For Dubai visitors, friends and family are the most dominant information source used to plan their trip (36%).

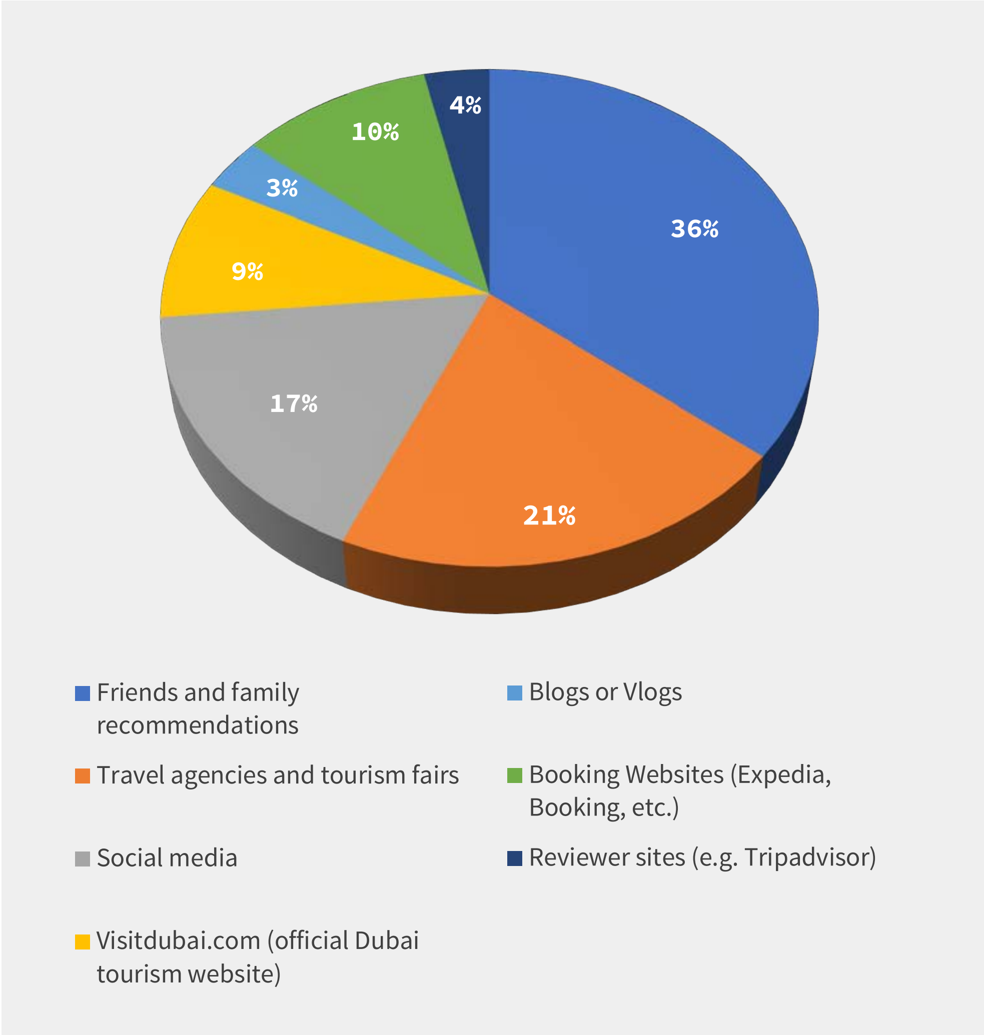


Figure 2. Information sources visitors used to plan a trip to Dubai

3.3 Media channels visitors used to share information about Dubai

The most popular media channel that Dubai visitors use to share information about their trip is Facebook (50%), followed by Twitter (24%) (Figure 3).

Facebook dominates by (50%) followed by Twitter (24%)

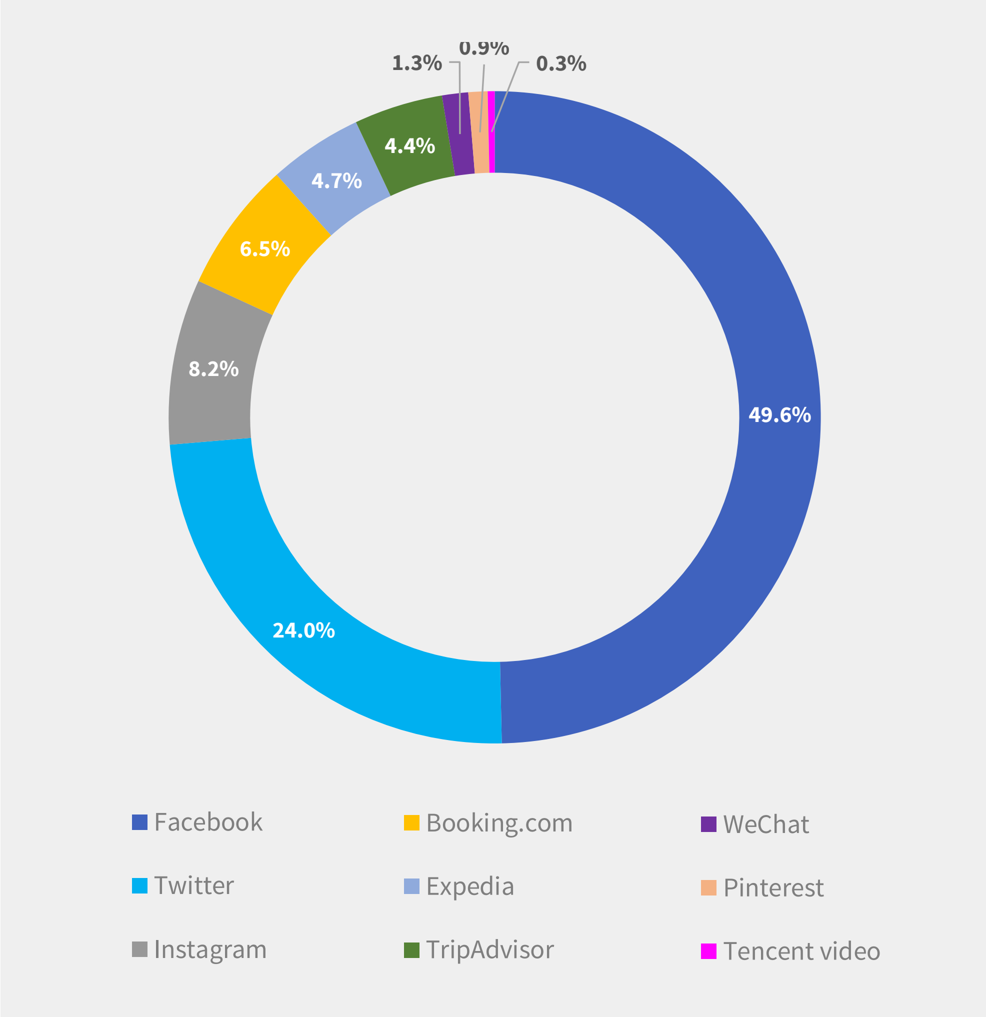


Figure 3. Media channels used to share information about Dubai

3.4 Visitors online behaviour and attitudes

The majority of Dubai visitors follow official social media accounts of travel destinations (84%), but at the same time 63% of them prefer unofficial sources of information, such as blogs and influencers. The majority (74%) also follows social media accounts of hotels, restaurants and clubs' on social media accounts once they have visited them at the destination.

They are very active social media users and gladly share information about their travels (78%) but also about their environmental concerns (72%). Furthermore, nearly 80% of Dubai visitors stated that sustainability-related information about a destination influences their decision to visit that destination. Finally, 85% believe that destinations and hotels should promote their sustainable practices.

A substantial number of visitors (82%) would also engage with a social media campaign to support sustainability goals if offered an incentive, which identifies them as good sustainability ambassadors for Dubai.

Table 3. shows details of visitor's online behaviour and attitudes related to sharing and following travel information and environmental information on social media, as well as the influence of sustainability-related information on their travel decision.

Statements	YES	NO
I follow official social media accounts of destinations/tourist attractions.	83.90%	16.10%
I prefer unofficial sources of information for a destination (for example, influencers, blogs, etc.).	62.80%	37.3%
I follow hotel/restaurant/club's social media accounts after visiting them at the destination.	74.10%	25.90%
I share posts about my travels on social media.	78.40%	21.70%
I am a member of a social media group (for example, a Facebook group) that is focused on sustainability.	71.90%	28%
I openly share my concerns about the environment on social media.	72.30%	27.70%
Positive sustainability-related information about a destination encouraged me at least once to visit that destination.	79.10%	20.90%
Negative sustainability-related information about a destination prevented me at least once from visiting that destination.	63.40%	36.60%
I believe that destinations/hotels should promote their sustainable practices.	84.90%	15.10%
I would engage (for example, send photos or videos) with a social media campaign to support sustainability goals if I'm offered an incentive (for example a discount)	81.70%	18.30%

Table 3. Visitors online behaviour and attitudes

4. DESTINATION CHOICES AND BOOKING MODE

4.1 Factors affecting destination choice

When choosing where to travel, the top three factors that Dubai visitors value most are: experiencing different cultures, visiting new destinations and the availability of crowd-free beaches. This was followed by interaction with local people and interesting sightseeing opportunities. Other important factors when choosing a destination are: "opportunity to explore independently, off the beaten track" and "trying local cuisine" (Figure 4).

Dubai visitors highly value experiencing different cultures, visiting new destinations and availability of crowd-free, clean beaches.

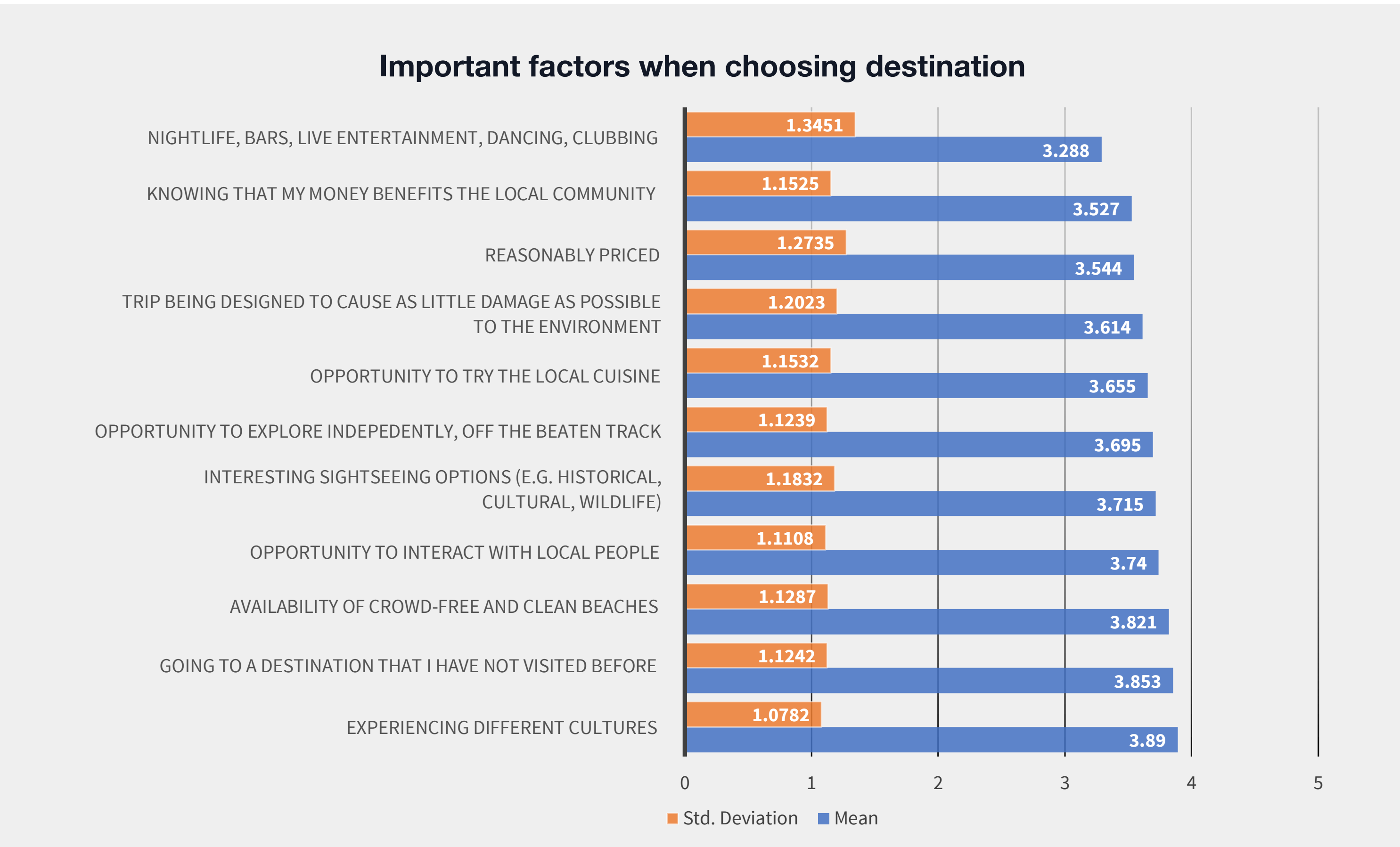


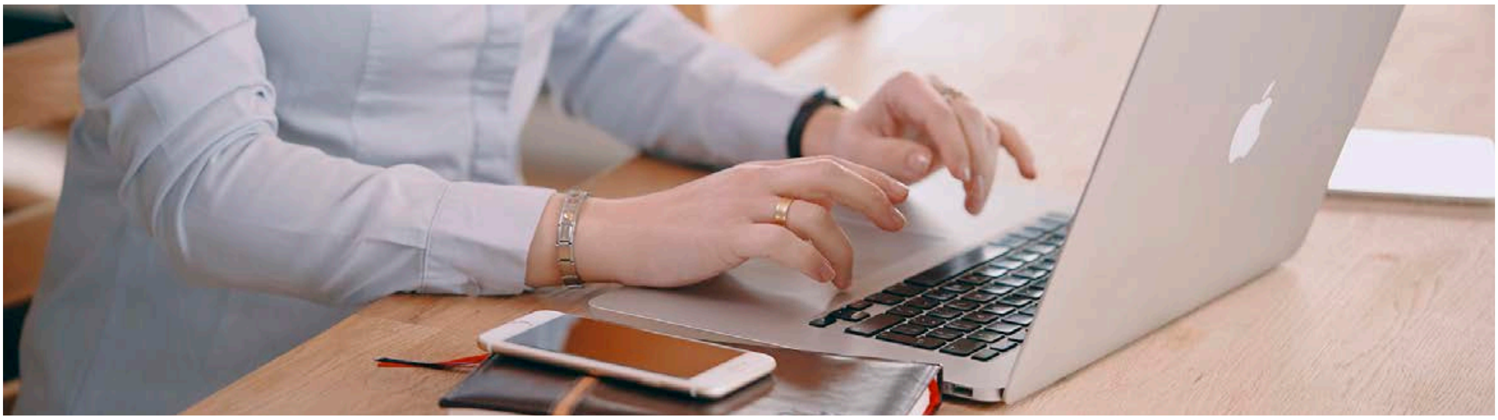
Figure 4. Important factors when choosing a destination

The factor that states "Trip being designed to cause as little damage as possible to the enviroment", respondents valued above 3.5, indicating that sustainable tourism packages are important for them when choosing a travel destination. "Reasonable price of the vacation" and "Knowing that their money benefits the local community" scored above 3.5, showing they value these factors as quite important when choosing a destination. Finally, "Nightlife, bars, live entertainment, dancing and clubbing" obtained the lowest rankes, indicating these are not priority factors for respondents when choosing a destination.

Based on the above, we conclude that ‘responsibility in travel choices’ ranks quite high and is an important factor for Dubai visitors.

Environmental and social responsibility in travel choices is an important factor for Dubai visitors.

4.2 Preferred booking mode



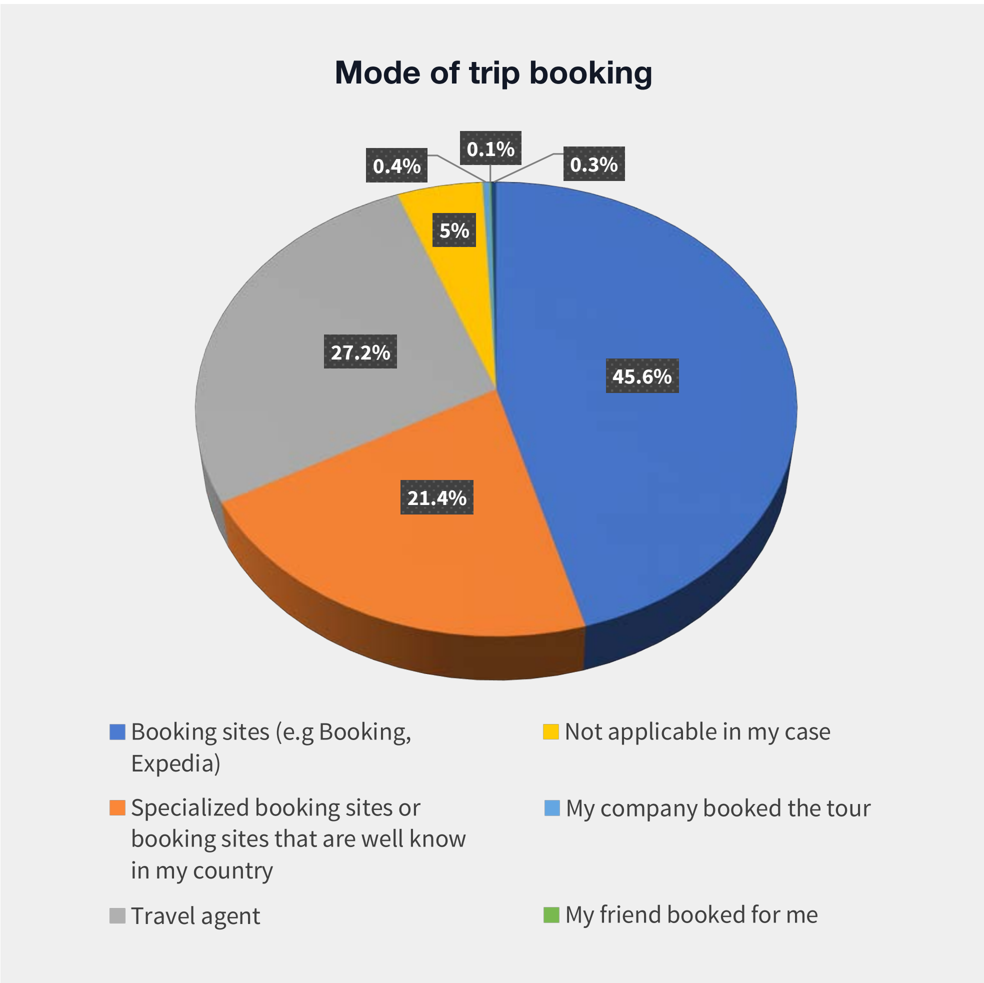


Figure 5. Mode of travel booking

The majority of Dubai visitors (45.6%) dominantly use global booking sites to book their trips (such as Booking.com. and Expedia). This is followed by booking through travel agents (27.2%). Specialized booking websites used in specific countries are the dominant booking mode for 21.4% of respondents (Figure 5).

The majority of Dubai visitors (45.6%) use global booking sites to book their trips (such as Booking.com and Expedia).

A small number of visitors booked a trip directly via the hotels (0.1%) they were staying at, but in some cases someone else (i.e. friends) booked the trip for them. Companies booked trips for 5 % of the market.

5. TRAVEL BEHAVIOR AT DESTINATION

5.1 Visitors' spending patterns

The majority of visitors spend between 1000 and 3000 US dollars during their visit to Dubai. And almost one third of them spends between 3000 and 5000 US dollars (Figure 6).

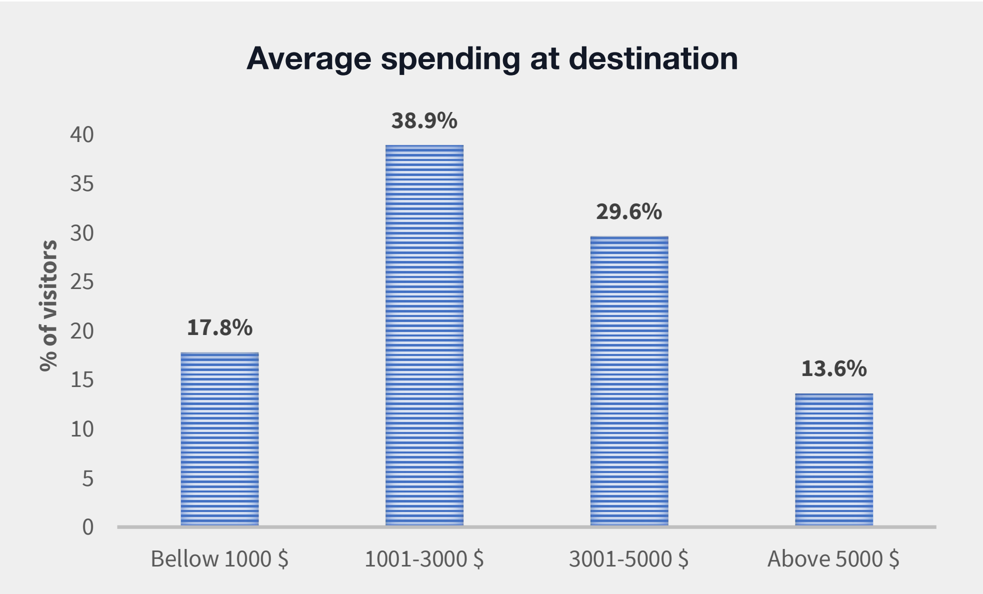


Figure 6. Average spending of visitors at Dubai

When it comes to the structure of their spending, 70 % of Dubai visitors spend most of the money on shopping and food, followed by excursions and sightseeing (37.5%). Dubai tourists spend the least on nightlife and local transport. (Figure 7).

Dubai visitors spend most on shopping, food, excursions and sightseeing (38%).

Figure 7. Spending patterns of Dubai visitors

5.2 Activities visitors participated in whilst in Dubai

Visitors of Dubai mostly participate in outdoor activities (62%) (camel and horse riding, biking, hiking, safari, etc.) and visiting museums (61%), followed by festivals (41%) and traditional arts (32%).

Visitors of Dubai participate the most in outdoor activities (62%)

Figure 8. Activities visitors participated in whilst in Dubai

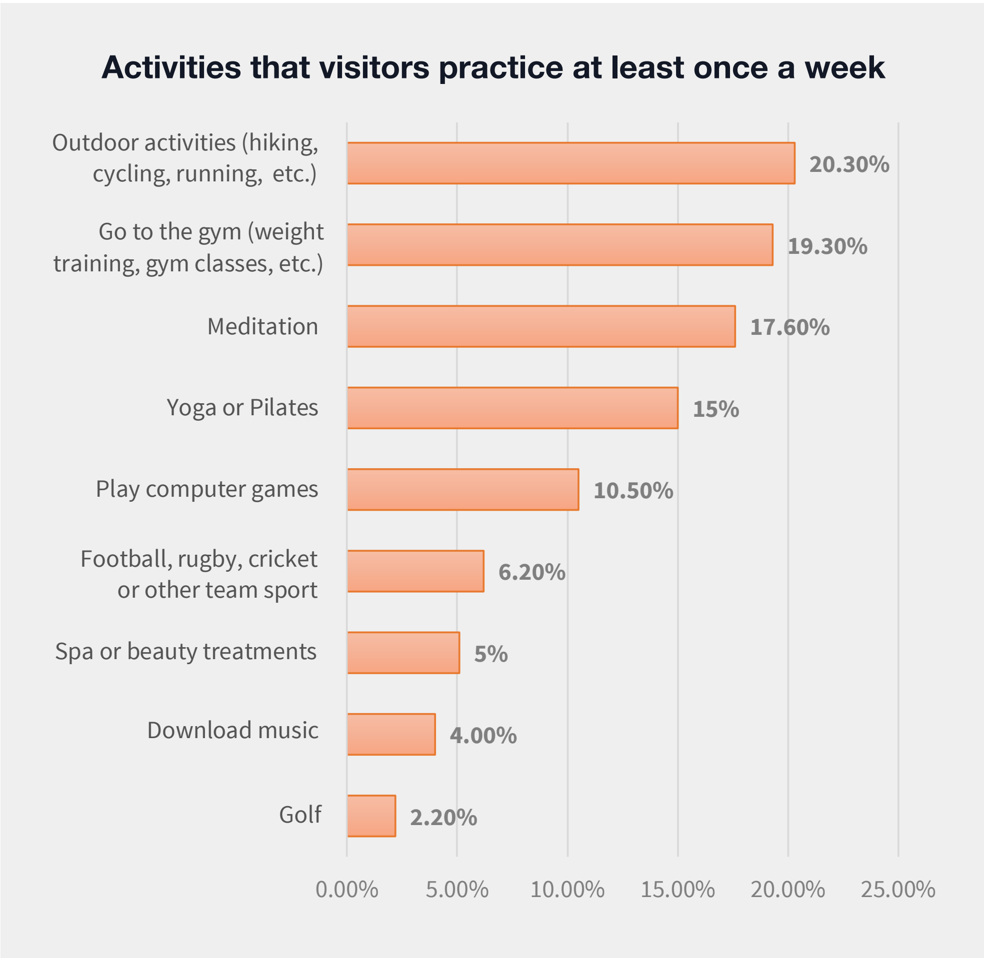


Figure 9. Activities that visitors practice at least once a week

To better understand visitors' habits and behaviour, the research also explored the activities they usually practice at least once a week in their everyday life.

This indicates that Dubai visitors take care of their health and wellbeing in everyday life

Dubai visitors regularly engage in outdoor actives (20%) and go to the gym (19%), but also practice meditation, yoga and pilates (15%). This indicates that Dubai visitors take care of their health and wellbeing in everyday life, which might implicate their engagement in similar activities whilst on holiday. This corresponds with the data showing they actively participated in outdoor activities during their visit to Dubai.

5.3 Preferred mode of transportation in Dubai

As research showed, Dubai visitors mainly use taxis, Uber or Careem as a means of transportation at the destination. This was closely followed by rent-a-car (Figure 10.)

Dubai visitors mainly use taxis, Uber and Careem.

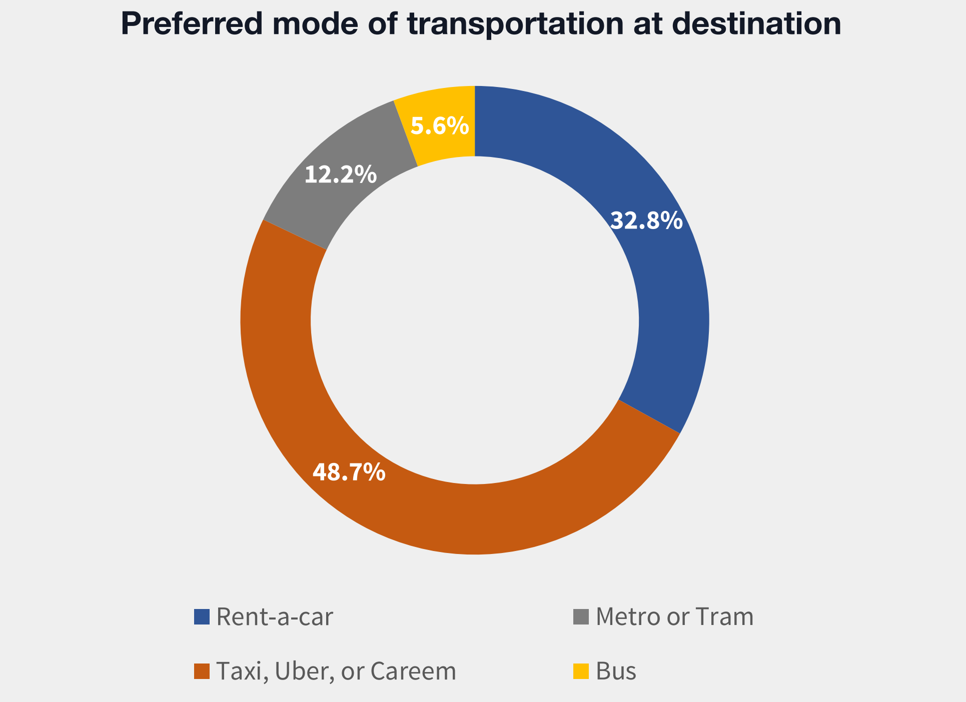


Figure 10. Preferred mode of transportation in Dubai

SUMMARY OF THE MOST DOMINANT VISITORS' BEHAVIOUR IN DUBAI

DESTINATION CHOICE FACTORS

- Experiencing different cultures
- Visiting new destinations
- Availability of crowd-free beaches
- Interaction with local people

SPENDING AT DESTINATION

- Mainly between 1000 and 3000 US dolars and 3000 and 5000 US dolars
- Shopping and food

BOOKING MODE

- Global booking websites

ACTIVITIES

- At home: outdoor actives, gym, meditation and yoga or pilates.
- At destination: outdoor activities (camel and horse riding, biking, hiking, safari etc.)
- Visiting museums, monuments and other cultural attractions
- Festivals

MODE OF TRANSPORT

- Mainly taxi, uber or careem

Figure 11. Summary of the most dominant visitors' behaviour at Dubai

6. SUSTAINABLE PRACTICES AND RESPONSIBLE TRAVEL

6.1 Global concerns

The main concern of Dubai visitors seems to be global warming (52%). The majority are also worried about air pollution (47%), human rights (47%) water quality and conservation (44%). They seem less concerned about toxic and nuclear waste, while some are not concerned about any of these issues (Figure 12).

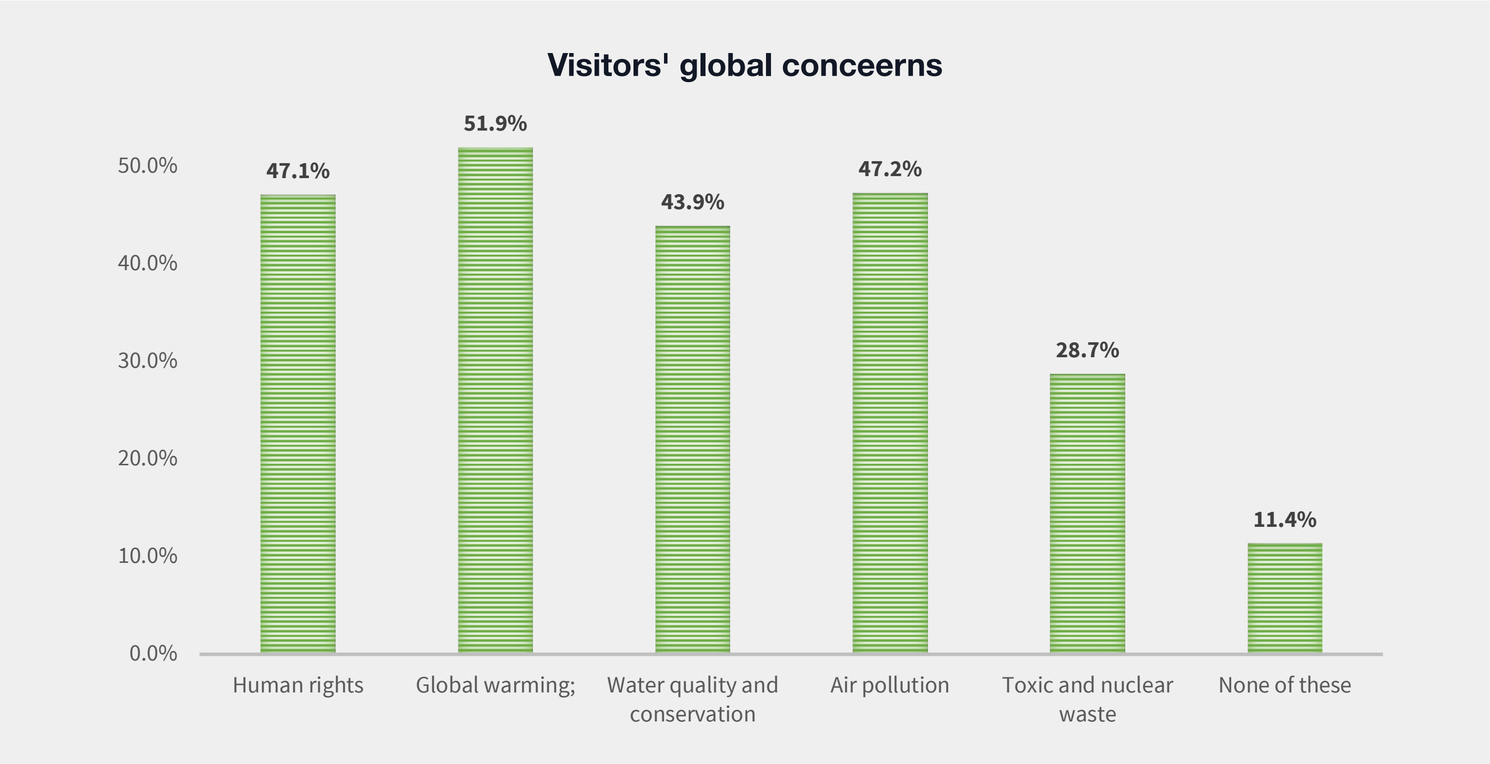


Figure 12. Representation of visitors' global concerns

6.2 Sustainability Awareness

Meaning and understanding of the sustainability concept

The majority of Dubai visitors show a considerable level of understanding of what sustainability means, with the highest number (44.3%) considering it an important concept which influences their behaviour and makes their lifestyles more sustainable (Table 4).

Meaning of sustainability for Dubai visitors	%
I've heard of the term "sustainability," but really don't know what it means	22.3
I care about sustainability, but as an individual, I don't think I can make a difference	22.9
It is a very important concept, and I have personally changed my behaviour to make my lifestyle more sustainable	44.3
It's only a trend, and it has no real benefit	2.8

Table 4. Meaning of sustainability for Dubai visitors

44% of Dubai visitors consider sustainability an important concept which influences their lifestyle.

Almost one-quarter of respondents are not familiar with the term "sustainability", whilst the same percentage believes they cannot do anything to make a difference (Table 4).

When it comes to familiarity of sustainability related terms, Dubai visitors are very acquainted with this terminology. Global warming and renewable energy are terms they are most familiar with, 83 and 76% respectively. At the same time, Dubai visitors show a significant understanding of other sustainability-related terms (63-70%) such as biodegradable, hybrid car, recycling and carbon footprint, closely followed by biodiversity (Table 5.).

Term	I know exactly what it means	Not sure	I've never heard of it
Global warming	83.1	13.8	3.1
Renewable energy	76.4	19	4.7
Hybrid car	70.4	22.9	6.7
Biodegradable	70.1	21.4	8.6
Recycling	63.2	28.1	8.7
Carbon footprint	63.2	28.1	8.7
Biodiversity	62	28.4	9.6

Table 5. Understanding of the specific terms related to sustainability (%)

More in-depth understanding of Dubai visitors' sustainability-awareness was further explored through visitors' recognition of the selected certifications and symbols (Figure 13).

The visitors are the most familiar with the Recycle and Energy Star symbols, 83% and 70% respectively.

The visitors are most familiar with Recycle and Energy Star symbols, 83% and 70% respectively, whilst they also show significant familiarity with other hotel specific certifications Green Key (65%) and Green Globe (63%) symbols.

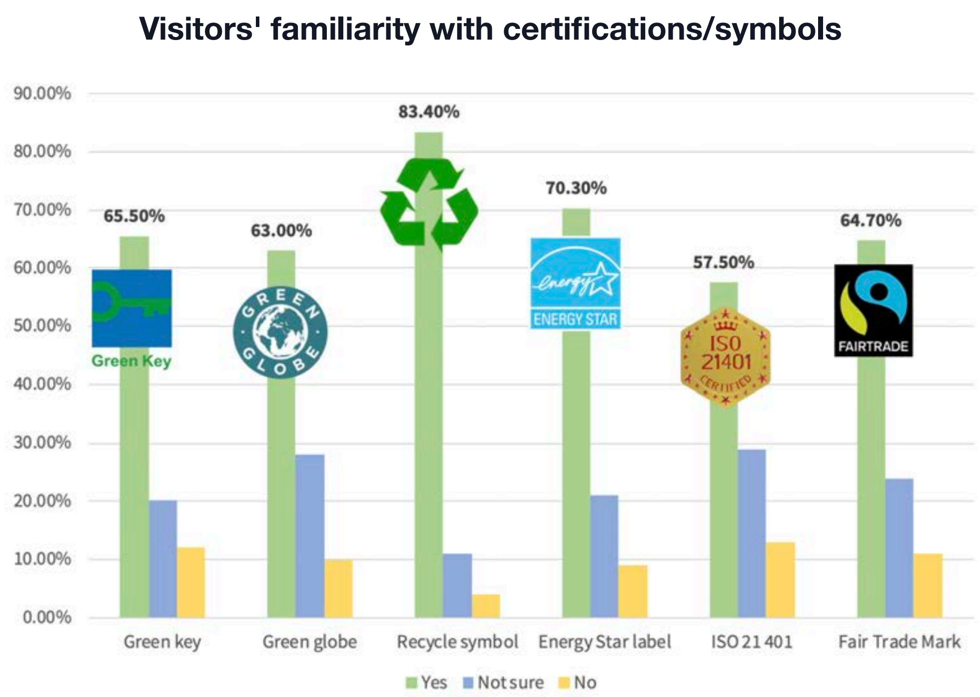


Figure 13. Visitors familiarity with certifications/symbols

6.3 Sustainable and responsible tourism practices

A single self-declaring question revealed that more than 50% of Dubai visitors consider themselves responsible, sustainability-minded travellers, whilst another 40% stated that they see themselves as responsible travellers at times (Figure 14). Only 5.3% of the respondents do not consider themselves sustainability/minded travellers, which is a rather small segment.

50% of Dubai visitors consider themselves responsible, sustainability-minded travellers, whilst another 40% stated that they see themselves as responsible travellers at times

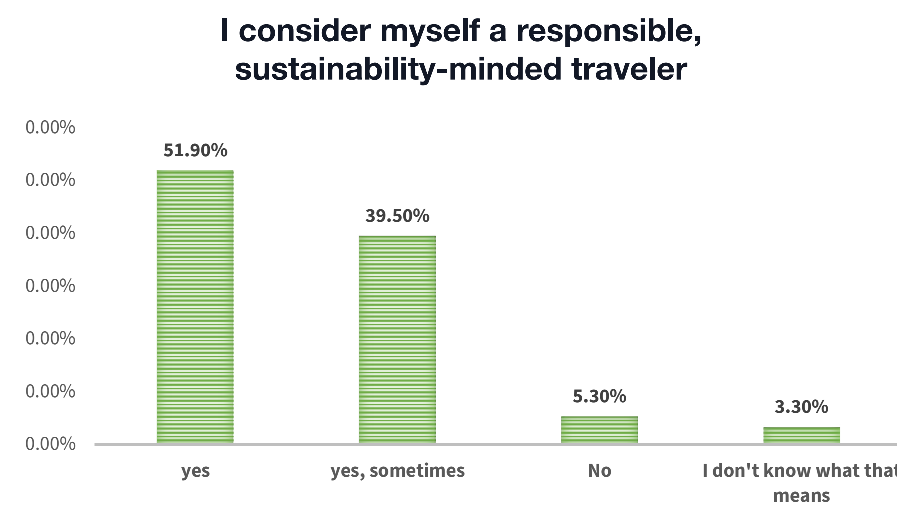


Figure 14. Respondents self-evaluation of how responsible and sustainability-minded travellers they are

Alternatively, when analyzed through lifestyle and behavioural stratements, Dubai visitors show medium concern, interest and behaviour towards sustainable tourism practices (the mean values for all the statements are ranging from 3.4 to 3.8). We can conclude that Dubai visitors are oriented towards experiences and when given a choice, choose to travel more sustainably (Table 6).

Dubai visitors are oriented towards experiences and when given a choice, choose to travel more sustainably

Statements	Mean	Std.
Life is more about experiences than the accumulation of material possessions.	3.83	1.057
Whenever possible, I book my trips with environmentally certified travel companies.	3.74	1.089
Whenever possible, I stay in environmentally certified accommodation.	3.72	1.053
I often donate to charity.	3.7	1.036
I care about the environment, but my holiday choices are determined mainly by price.	3.58	1.115
I am interested in learning about what travel companies are doing to prevent global warming.	3.57	1.242
I don't engage in vacation activities, which might negatively impact the environment.	3.51	1.126
I purchase carbon offsets to compensate for carbon emissions from flying.	3.462	1.144

Table 6. Attitudes and sustainable tourism behaviour of Dubai visitors

In support of the above, research also showed that Dubai visitors are willing to pay more for responsible travel.

A majority (50-60%) of Dubai visitors would pay at least 5% more for responsible travel options, whilst more than one-third would pay 20% or more. Furthermore, they are most keen to pay extra if they know that money would go towards preservation of the local natural environment, reversal of negative impacts of tourism (over 60%) and guaranteeing good wages and working conditions for the staff at the destination (over 57%).

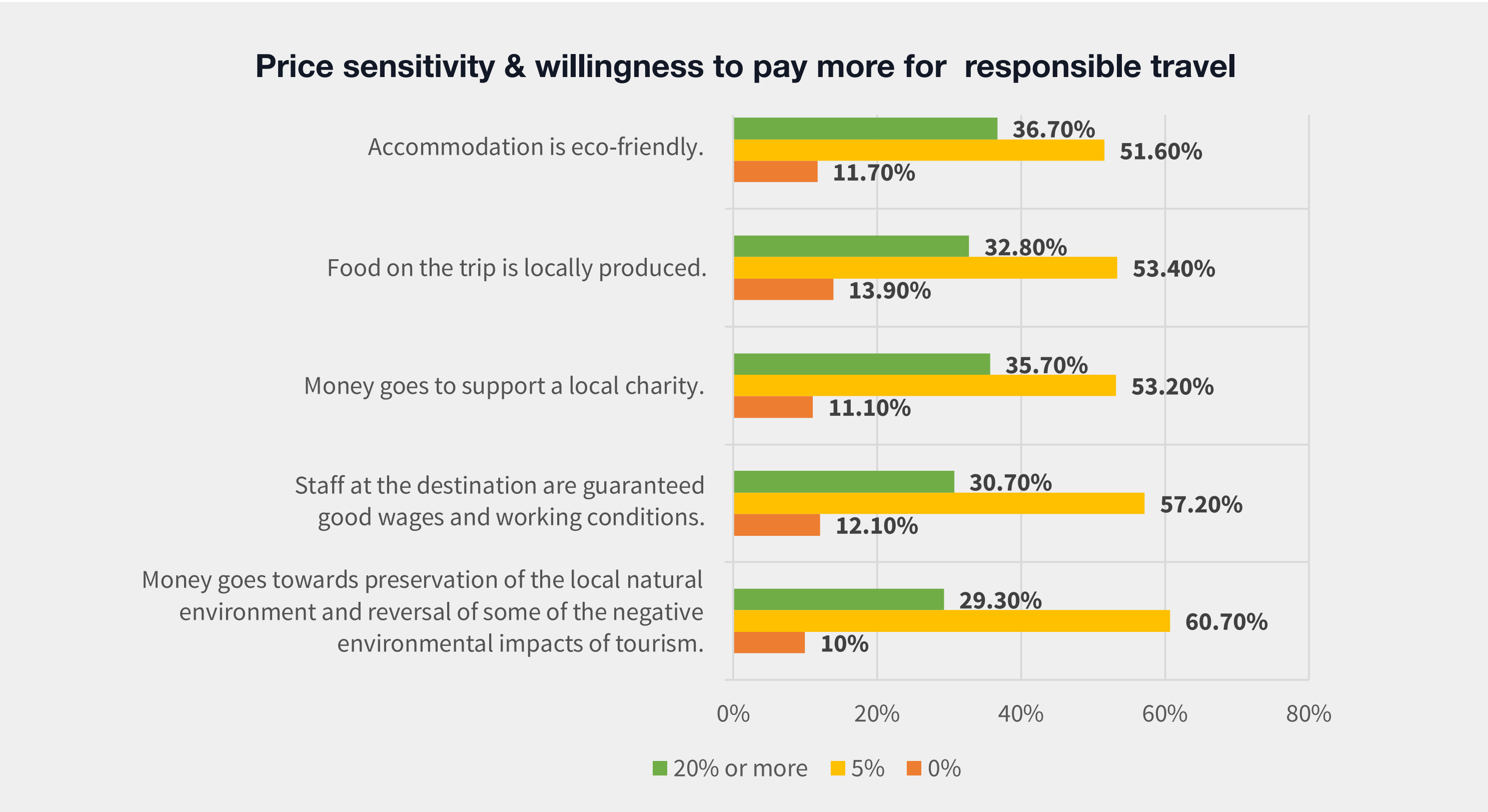


Figure 15. Price sensitivity & willingness to pay more for responsible travel

37% of Dubai visitors would pay 20% more for eco-friendly accommodation and if the money supports a local charity.

Finally, 10-13% of respondents are not willing to pay more for any of the suggested elements of the responsible travel.

37% of Dubai visitors would pay 20% more for eco-friendly accommodation and if the money supports a local charity.

SUMMARY OF DUBAI VISITORS' SUSTAINABILITY INCLINATIONS

GLOBAL CONCERNS

1. Global warming
2. Air pollution
3. Wuman rights
4. Water quality and conservation

SUSTAINABILITY CONCEPTS

- Important concept influencing their behavior
- Best understanding of global warming and renewable energy
- The most familiar with recycle and energy star label symbols

RESPONSIBLE TOURISM PRACTICES

- 50% of Dubai visitors consider themselves as a responsible, sustainability minded travelers to a different extent
- Oriented towards experiences and will choose to travel more sustanable
- Majority of Dubai visitors would pay at least 5% more for responsible travel
- Would pay the most for eco-friendly accommodation and if the money goes to a local charity.

Figure 16. Summary of Dubai visitors' sustainability inclinations

7. SUSTAINABILITY-FOCUSED MARKET SEGMENTATION AND RESPONSIBLE TRAVEL BEHAVIOR

Sustainability-related tourist market segments

The segmentation of the sustainability-minded Dubai tourist market was based on the cross-analysis of multiple variables; the respondents' habits, behaviours and sustainable practices, levels of sustainability awareness, the meaning respondents attach to sustainability and finally, their self- assessment of whether they are responsible travelers. Such comprehensive analysis has revealed the existence of three distinct groups and major sustainability-related tourist market segments;

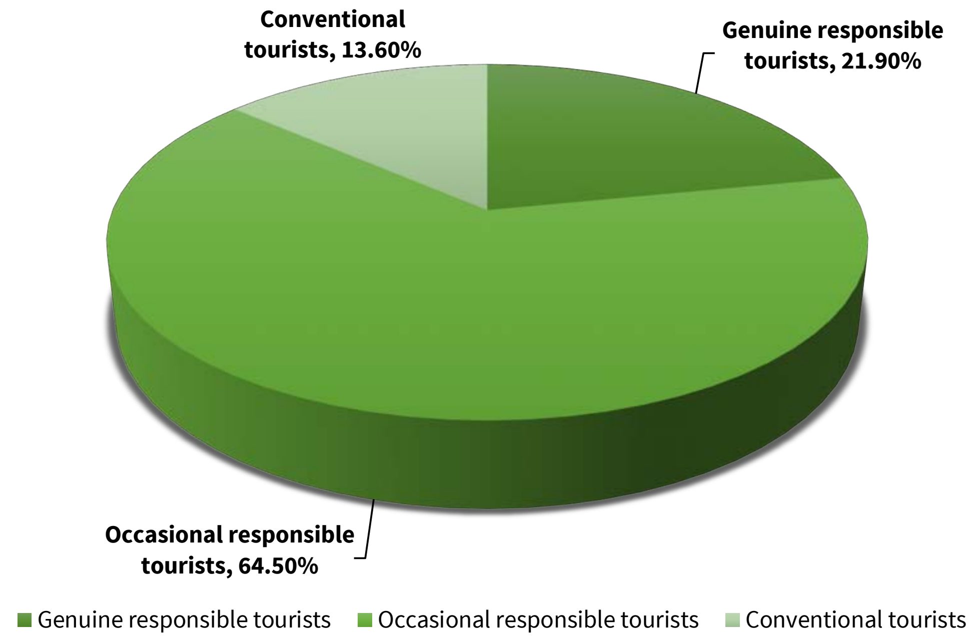


Figure 1. Sustainability-based segmentation of the Dubai tourist market

GENUINE RESPONSIBLE TOURIST

Tourists who are highly sustainability-minded and make 22% of the Dubai tourist market.

OCCASIONAL RESPONSIBLE TOURIST

Tourists who are moderately sustainability-minded and represent 64.5% of the Dubai tourist market.

CONVENTIONAL TOURISTS

Tourists who do not engage in sustainability-related tourist behaviours and do not consider themselves responsible travellers and represent 13.6% of the Dubai tourist market.

7.1 Familiarity with sustainability terms and eco certifications

Findings show that Genuine responsible tourists are consistently most familiar with all sustainability terms (70%-89%), followed by Occasional responsible tourists (59%-83%) and least familiar Conventional tourists (42%-70%). It is interesting to note that all analyzed segments show a high level of familiarity with sustainability terms, which could be due to the presence of sustainability and environmental issues in the media more than ever before (Shahzalal & Hassan, 2019). This heightens awareness and familiarity with those concepts and terms among the general population. Genuine responsible and Occasional responsible tourists are the most familiar with terms such as global warming (88% and 81% respectively), recycling (87% and 84% respectively), and renewable energy (82% and 73% respectively). Conventional tourists show the highest sustainability-terminology familiarity when it comes to recycling (70%), renewable energy (66%) and hybrid car (62%), which are the terms they are very likely to hear in everyday life. On the other hand, they are the least familiar with terms such as carbon footprint, biodegradable, and global warming, which are global issues related to environmental sustainability. Although all segments generally show the lowest familiarity with the term carbon footprint, among Genuine responsible and Occasionally responsible tourists there is still almost 60-70% of those who are familiar with this term, which indicates a very high level of awareness of this issue.

Genuine responsible tourists are consistently most familiar with all sustainability terms (70%-89%), followed by Occasional responsible tourists (59%-83%) and least familiar Conventional tourists (42%-70%).

Sustainability terms	Genuine responsible %	Occasional responsible %	Conventional %
Global warming	87.7	13.8	3.1
Recycling	87.2	19	4.7
Renewable energy	81.8	22.9	6.7
Biodegradable	77.6	81.1	57.4
Hybrid car	75.2	83.5	70.5
Carbon footprint	69.8	72.6	65.6

Table 1. Familiarity with sustainability-related terminology

When it comes to familiarity with eco--certifications, results are similar as in case of sustainability terms. Across the segments, Genuine responsible tourists are the most familiar with all eco certifications, showing a very high percentage of familiarity (71%-86%), especially with recycling symbol, green key, and the energy star label. Occasional responsible tourists show a considerably lower level of familiarity, being most familiar with recycling symbols and energy star label. Conventional tourists show the lowest familiarity with certifications, with a higher percentage of those who are familiar with recycle symbol.

It is very important to note that certifications related to accommodation establishments such as Green key and ISO21401 are not well known among Occasionally responsible and conventional tourists, indicating the need for intensifying awareness of such certifications amongst the general public.

The decline in familiarity with sustainability terms and certifications from Genuine to Conventional tourists could be explained by the decrease in interest for sustainability issues, but also by lack of information and knowledge about sustainability terms. This again indicates a need for better, more-frequent sustainability-related communication, directed towards the general public or conventional tourists. This could result in the change towards a more responsible behaviour.

Genuine responsible tourists are the most familiar with all eco certifications, showing a very high percentage of familiarity (71%-86%), especially with recycling symbol, green key, and the energy star label.

Eco certifications	Genuine responsible %	Occasional responsible %	Conventional %
Recycle symbol	85.9	83.9	62.3
Energy star label	78.9	63.7	45.9
Green key	78.2	52.8	44.3
Green globe	73.5	53.5	41.0
ISO21401	71.4	44.1	32.8

Table 2. Familiarity with eco certifications

7.2 Tourist attitudes and responsible tourism behaviour

When it comes to responsible (sustainable) behaviour and attitudes of tourists they are largely in line with the segments of responsible tourists (Figure 2)

Genuine responsible tourists show the most positive attitudes and show the highest level of environmental responsibility when traveling

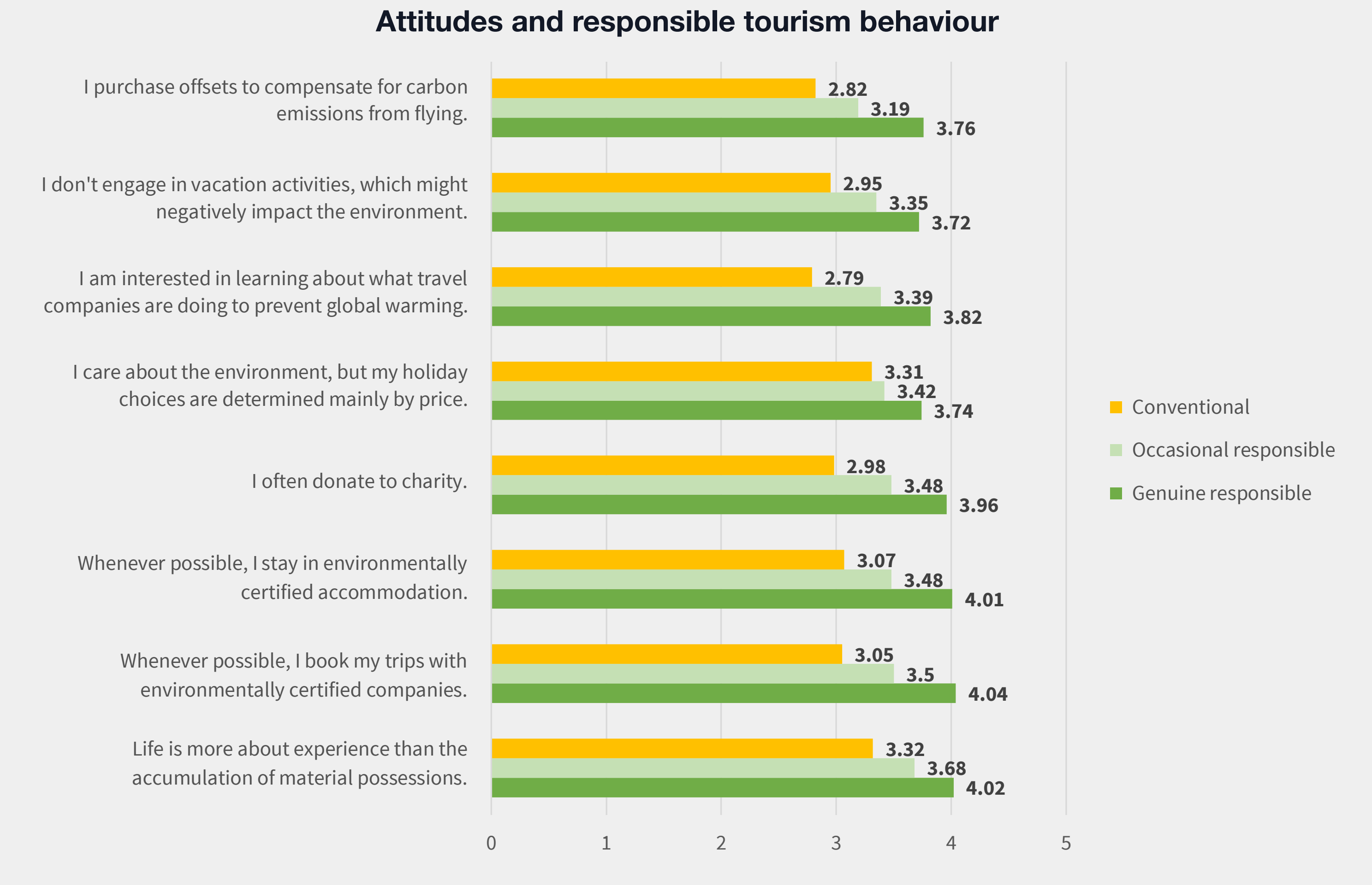


Figure 2. Differences in attitudes and responsible tourism behavior

Genuine responsible tourists show the most positive attitudes and show the highest level of environmental responsibility when traveling (mean values range from 3.72 to 4.04). Genuine responsible tourists often book their trips through environmentally-certified travel companies and stay in environmentally certified accommodation (which coincides with their high level of familiarity with eco-certifications). They consider that life is more about experiences than the mere accumulation of material possessions. This is in line with literature which suggests that sustainability-engaged tourists tend to be experienced travelers (CREST, 2009; Booking. com, 2019b). They also tend to donate to charity, which indicates their high level of social responsibility (Booking.com, 2017; ILO, 2010).

Conventional tourists show lower levels of responsibility

Occasional responsible tourists also show sustainably-minded attitudes and behavior but to a lesser extent, as they show lower mean values for all statements. Among their most valued statements is that 'life is more about experience than material possessions', meaning they seek experiential travel. They prefer to book their trips via environmentally certified travel providers, stay in eco-certified accommodation and donate to charity, but not as often or not as consistently as Genuine responsible tourists.

Conventional tourists mainly show lower levels of responsibility when planning and going on their travel (mean values are low ranging from 2.82 to 3.32). Interestingly, they ranked highest statements that 'life is more about experiences than material possessions', yet they are very price sensitive and their holiday choices are mainly determined by price.

7.3 Overall Expenditure and Spending patterns of responsible tourist market segments

Findings indicate that Genuine responsible tourists spend more money at the destination than the other two categories of tourists. The majority of them spend between US$1001-3000 and US$3001-5000 at the destination. This is in line with earlier studies which suggested that responsible tourists usually have higher income and tend to spend more money at the destination (Global Data's Q4-2016 consumer survey). Occasional responsible tourists spend more than conventional tourists. In most cases, they spend US$1001-3000 at the destination. It can be also noticed that conventional tourists have very diverse spending patterns, as all spending categories are quite evenly distributed, with somewhat more respondents in categories US$1001-3000 and US$3001-5000 (Table 3).

	Genuine responsible %	Occasional responsible %	Conventional %
< US$1000	15.8	18.3	23
US$1001-3000	37.4	45.2	27.9
US$3001-5000	31.4	28.9	26.2
> US$5000	15.4	7.6	19.7

Table 3. Differences in visitors' spending at destination

Genuine responsible tourists spend more money at the destination than the other two categories

When it comes to spending patterns, research shows that Genuine responsible tourists spend more money on each spending category shown in Table 4, compared to the other two segments. Shopping and food are categories on which all three segments spend most at the destination (excluding accommodation), while they consistently spend least on nightlife which is in line with the destination image. As expected, Occasional responsible tourists consistently spend less money than Genuine responsible tourists in each spending category. Compared to Genuine responsible and Conventional tourists they spend less money on local transport.

	Genuine responsible %	Occasional responsible %	Conventional %
Food	73.5	68.1	56.9
Shopping	74.2	69.1	27.5
Local transport	40.8	30.2	35.3
Excursions/Sightseeing	44.1	34.4	17.6
Souvenirs or Gifts	35.8	30.9	15.7
Tickets to attractions	44.1	32.4	25.5
Nightlife	24.1	17.1	13.7

Table 4. Differences in visitors spending patterns

Genuine responsible tourists spend more money on each spending category shown in Table 4, compared to the other two segments. Shopping and food are categories on which all three segments spend most at the destination (excluding accommodation), while they consistently spend least on nightlife which is in line with the destination image.

Conventional tourists show somewhat different spending patterns than the other two categories of responsible tourists. They spend the most on food and local transport but also on souvenirs and excursions/sightseeing. Overall, it is clear that they spend significantly less than the other two categories. This confirms that not only their responsible choices are determined by price, but also that their price-sensitivity impacts their overall spending whilst on holiday.

7.3.1 Sustainability-related Price-sensitivity

When it comes to their willingness to pay more, Genuine responsible tourists are willing to pay more for all the listed forms of responsible tourism choices even when it comes to paying 20% or more. They are prepared to pay the most for eco-friendly accommodation, with nearly half of this segment ready to pay 20% or more. 43% are ready to pay over 20% if the money goes to support a local charity, and that tourism destination staff are guaranteed good wages and working conditions (39%). This is in line with previous research findings that show people are more likely to book accommodation knowing it was eco-friendly and that they are willing to spend more on their holidays if they are assured that workers in the sector are guaranteed ethical labour conditions (Booking.com, 2017; ILO, 2010). This is also in line with the previously shown results of the current study which indicate that Genuine responsible tourists most often stay in environmentally certified accommodation and are the most familiar with eco certifications. This indicates that responsible tourists in Dubai recognize all three dimensions of responsible tourism, as defined by UNEP and UNWTO (2005): optimal use of environmental resources, respect the socio-cultural authenticity of host communities, insurance of viable, long-term economic operations, providing socio-economic benefits to all stakeholders.

Genuine responsible tourists are willing to pay more for all the listed forms of responsible tourism choices even when it comes to paying 20% or more.

For all the listed categories of responsible tourism choices (Table 5.), 59% to 70% of Occasional responsible tourists are prepared to pay 5% more, while over 21% of them would pay 20% or more. They are most willing to pay more if the money goes towards the preservation of the local natural environment and reversal of some of the negative environmental impacts of tourism (70%), if the tourism staff are guaranteed good wages and working conditions (64%) and if accommodation is eco-friendly (62%).

Finally, when it comes to Conventional tourists, approximately half of them show great willingness to pay an additional 5% for responsible tourism choices, especially when it comes to cases where the money goes to the local charity and if the staff at the destination are guaranteed good wages and working conditions'. Both selections clearly indicate that they care the most for social responsibility. However, Conventional tourists are clearly not ready to pay 20% or more for responsible tourism options, with locally produced food being slightly more likely to be valued more by this segment. Interestingly, eco-friendly accommodation does not seem to be on their list of priorities, with nearly 40% stating they are not ready to pay as little as 5% more for it.

Table 5. Willingness to pay more for responsible tourism

	Genuine responsible %			Occasional responsible %			Conventional %		
	0%	5%	20 or more	0%	5%	20 or more	0%	5%	20 or more
Money goes towards the preservation of the local natural environment and reversal of some of the negative environmental impacts of tourism	7.1	55.5	37.4	9.1	69.6	21.3	32.8	49.2	18
Staff at the destination are guaranteed good wages and working conditions.	8.8	52.2	39	13.5	64.1	22.4	26.2	55.7	18
Money goes to support a local charity.	8.8	48.3	42.9	12.2	60.4	27.4	23	55.7	21.3
Food on the trip is locally produced.	9.8	51.5	38.7	15.7	58.7	25.7	37.7	39.3	23
Accommodation is eco-friendly.	8.5	45.2	46.2	11.5	62.2	26.3	39.3	41	19.7

Half of Conventional tourists are willing to pay an additional 5% for responsible tourism choices, especially when the money goes to the local charity and if the staff at the destination are guaranteed good wages and working conditions. Both selections clearly indicate that they care about social responsibility.

8. SUSTAINABILITY-RELATED CHARACTERISTICS AND BEHAVIORS OF TOURISTS IN DUBAI

8.1 Destination choices

When choosing a travel destination, 'going to a destination they have never visited before' is Genuine responsible tourists top priority, closely followed by 'availability of crowd-free and clean beaches', and 'experiencing different cultures'. They also highly value the opportunity to interact with local people, explore destinations independently, interesting sightseeing options, and the opportunity to try local cuisine. It is also important to mention that factors such as knowing that their money benefits the local community and trip being designed to cause as little damage as possible to the environment are valued much more by Genuine responsible tourists than the other two segments. This indicates that Dubai market findings are very much in line with the existing global literature in the field, suggesting that the majority of responsible tourists seek authentic experiences that are representative of local culture, authenticity, 'green' experiences, but also a deeper meaning of travel which can be reflected in engaging with local culture and contributing to the protection of the destination's environment (CREST, 2009; Booking. com, 2019b). Finally, the literature suggests that sustainability-engaged tourists tend to be experienced tavellers which has been confirmed in this study.

When choosing a travel destination, 'going to a destination they have never visited before' is Genuine responsible tourists top priority, closely followed by 'availability of crowd-free and clean beaches', and 'experiencing different cultures'.

For Occasional responsible tourists, top priorities when choosing a travel destination are: experiencing different cultures, visiting a destination that they have never visited before as well as interesting sightseeing options. Similar to Genuine responsible tourists, they highly value the availability of crowd-free and clean beaches and the opportunity to interact with local people, yet to a slightly lesser extent.

For Occasional responsible tourists, top priorities when choosing a travel destination are: experiencing different cultures, visiting a destination that they have never visited before and interesting sightseeing options.

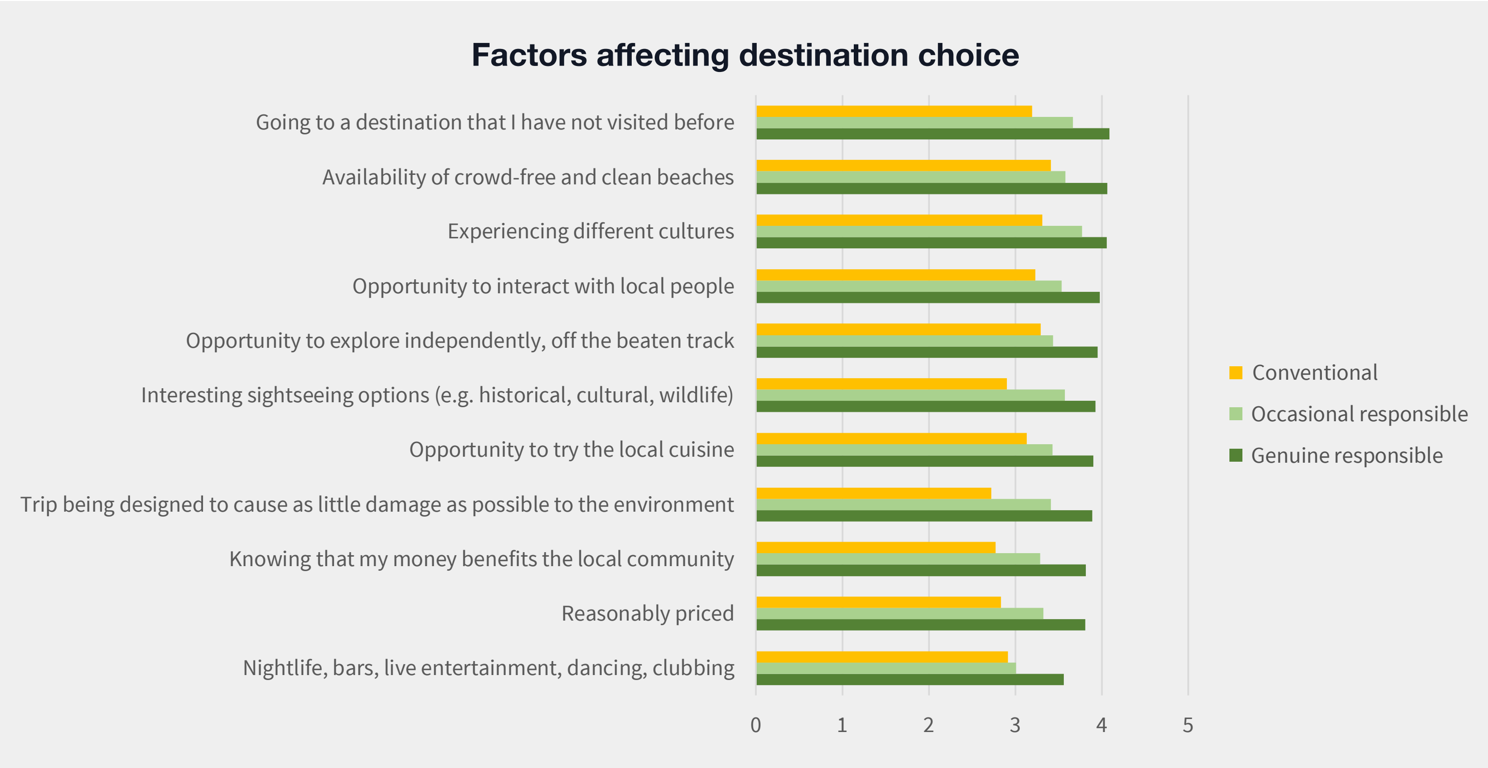


Figure 3. Differences in factors affecting destination choices

Conventional tourists ranked highest "the availability of crowd-free and clean beaches", followed by "experiencing different cultures" and "opportunities to explore independently", and the opportunity to interact with local people.

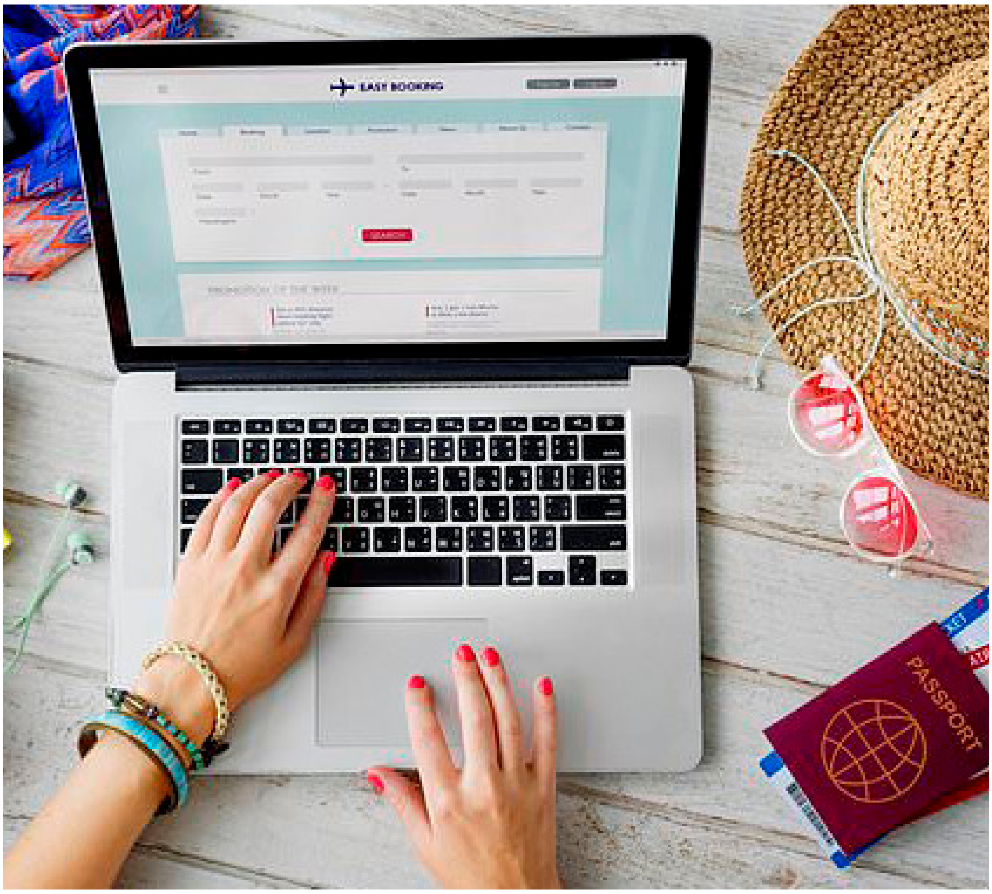
Conventional tourists attach less value to all analyzed factors of destination choice, compared to the more responsible tourist categories (Figure 3). They ranked highest "the availability of crowd-free and clean beaches", followed by "experiencing different cultures" and "opportunities to explore independently", and the opportunity to interact with local people. This indicated that similar factors affect destination choices of all segments of the Dubai tourist market although to a different extent, meaning that Dubai should use this in promoting their tourist resources, experiences, and activities.

8.2 Booking mode

When it comes to the most common booking channels, we observe a few differences between the segments. Genuine responsible tourists prefer booking their trips via booking sites (51%), while Occasionally responsible tourists use booking sites (38%) and travel agents (35%). Conventional tourists show a high preference for major booking sites such as Expedia and Booking.com.

Booking modes	MEAN VALUE		
	Genuine responsible %	Occasional responsible %	Conventional %
Booking sites (e.g. Booking, Expedia)	51.3	38.3	44.3
Specialized booking sites or booking sites that are well known in my country	22.3	20.7	24.6
Travel agent	22.6	34.8	23

Table 6. The most common booking mode



Genuine responsible tourists prefer booking sites (51%), while Occasionally responsible tourists (38%) and travel agents (35%).

Moreover, results indicate that about 20%-25% of the respondents across all market segments also book their trip through specialized booking sites or booking sites that are well known in their country, which should be considered in the promotion of Dubai's tourist offer. Previous research shows that the preferred travel portal in India is www.goomo.com[1], in China Ctrip (and eLong.com and mangocity.com in lower extend)[2], in Russia it is tutu.ru[3], in Saudi Arabia is www.saudia.com[4] and www.cleartrip.sa, while in the UK it is Expedia, Tivago, Opodo and www.wegotravel.co.uk.

[1] https://www.goomo.com/
[2] https://www.chinainternetwatch.com/519/top-chinese-online-travel-booking-websites/
[3] https://russiansearchmarketing.com/top-10-russian-travel-sites/
[4] https://www.saudia.com/travel-with-saudia

8.3 Transport at destination

When it comes to the transport mode that visitors use at destination, the most frequent answer amongst all segments is taxi, Uber, or Careem (47%-53%). Respondents' second choice is rent-a-car, while local public transport such as bus and metro or tram are seldom used by respondents. Genuine responsible tourists use local public transport less than the other two segments, whilst conventional tourists use it the most. From the sustainability point of view, this finding is somewhat unexpected, yet it is perfectly in line with the previously noted price-sensitivity of the segments. Another reason behind this finding could be the fact that local public transport facilities in Dubai are not yet fully developed hence connect only some areas of the city.

Mode of transport	Genuine responsible %	Occasional responsible %	Conventional %
Rent-a-car	37.4	28.6	21.7
Taxi, Uber or Careem	47.5	51.2	53.4
Metro or Tram	11.3	13	15
Bus	3.8	7.3	10

Table 7. Mode of transport used by respondents

When it comes to the transport mode that visitors use at destination, the most frequent answer amongst all segments was taxi, Uber, or Careem (47%-53%).

8.4 Lifestyle activities and tourist activities at the destination

When it comes to the activities that respondents practice at least once a week in their everyday life, Genuine responsible tourists practice meditation the most (22%), they go to the gym (21%) and practice outdoor activities (18%). As these three activities are a part of everyday life of this important segment, the destination should enable them to practice those activities during their vacation and emphasize those activities in promotional campaigns. Activities such as golf, downloading music, and spa and beauty treatments seem to interest only a very few of them.

Genuine responsible tourists practice meditation the most (22%), they go to the gym (21%) and practice outdoor activities (18%).

Activities	Genuine responsible %	Occasional responsible %	Conventional %
Meditation	22	12.6	11.5
Yoga or Pilates	15	13.5	23
Go to the gym (weight training, gym classes, etc.)	20.6	18.3	18
Outdoor activities (hiking, cycling, running, etc.)	18.3	23.5	14.8
Spa or beauty treatments	4.8	5.7	1.6
Golf	2.3	2	3.3
Football, rugby, cricket or other team sport	7	5	4.9
Play computer games	7.6	13.9	11.5
Download music	2.2	5.9	9.8

Table 8. Activities that tourists practice at least once a week

The activities that Occasionally responsible tourist practice the most are outdoor activities (24%) and going to the gym (18%). They practice golf, sports (football, rugby, cricket or other team sport) and downloading music the least. Compared to other segments, they tend to practice outdoor activities and play computer games slightly more. They also show a tendency to download music more than other segments (10%).

When it comes to conventional tourists, the activities they practice the most are yoga and pilates (23%), going to a gym (18%), and outdoor activities (15%) (Table 8). They practice the least spa and beauty treatments, golf, and team sports.

When it comes to activities that tourists practice at destination (Table 9), the top three activities for all segments are outdoor activities, visiting museums, monuments, and other cultural attractions and festivals. However, there are some notable differences between the segments. Genuine responsible tourists consistently practice all types of tourist activities at the destination more than the other two segments. On the other hand, Conventional tourists stand out only when it comes to volunteering. As conventional tourists according to our study mainly belong to generation Z, this is an expected finding, as according to Booking.com (2019a) research, Gen Z is the generation that is most interested in volunteering as a travel experience.

Occasional responsible and Genuine responsible tourists also practice visiting museums, monuments, and other cultural attractions (63%) much more than the Conventional tourists (35%).

The top three activities for all segments are outdoor activities, visiting museums, monuments, and other cultural attractions and festivals.

Activities	Genuine responsible	Occasional responsible	Conventional
Outdoor activities (camel and horse riding, biking, hiking, safari, etc.)	67.8%	56.2%	62.7%
Visiting museums, monuments and other cultural attractions	63.4%	63.4%	35.3%
Festivals	45.2%	36.1%	37.3%
Traditional arts and Bedouin life	38.9%	28.2%	15.7%
Sport activities	32.2%	21.5%	17.6%
Volunteering	17.4%	10.9%	21.6%
Medical treatment	4.0%	2.7%	0.0%

Table 9. Tourist activities at the destination

It is also evident that profiles of Genuine responsible and Occasionally responsible tourists in this research very much coincide with LOHAS (Lifestyles of Health and Sustainability) market segment in the earlier conscious-consumer market studies (NMI, 2008). This market segment values health, the environment, social justice, and personal development. Our study proved that responsible tourists not only care about environmental and social issues, but they also take care of their health and personal development. This can be seen from the activities they practice in their everyday life: they meditate, go to the gym, practice outdoor activities and at the destination, where they engage in outdoor activities (camel and horse riding, biking, hiking, safari, etc.), visiting museums, monuments, and other cultural attractions and festivals as well as traditional arts and Bedouin life.

These findings also coincide with the essential characteristics of CREST (2009) typology of Unethical and Apathetic Travelers on one side, and Conscientious and Ethical Travelers on the other. Conscientious and Ethical Travelers, similarly to Genuine responsible and Occasionally responsible tourists are increasingly seeking experiences, fulfillment, and rejuvenation rather than just visiting places and things. These consumers have a higher than average social consciousness and therefore seek interactive holidays that provide an enriching experience quite distinct from their day-to-day lives (CREST, 2009).

Occasional responsible and Genuine responsible tourists also practice visiting museums, monuments, and other cultural attractions (63%) much more than the Conventional tourists (35%).

8.5 Pro-sustainable and responsible behaviour of hotel guests – hotel employees observations

To obtain better insight into the responsible and pro-sustainable behaviour of hotel guests in Dubai, and to confirm the validity of the above findings of the visitor survey, hotel employees were asked to evaluate their guests' pro-sustainability behaviour and interest in sustainability initiatives.

47% of the respondents agreed that guests noticed a number of eco and sustainability initiatives in their hotels and 53% experienced guests asking to try the local cuisine.

47% of the respondents agreed that guests noticed a number of eco and sustainability initiatives in their hotels and 53% experienced guests asking to try the local cuisine. Other notable sustainability-oriented guests' behaviours were: the use of public transport (50%) and reusing room towels (44%). Guests do not openly show interest in eco-certification of the hotel, yet are ready to pay more for eco-certified products and services. Results also indicated that responsible behaviour and pro-sustainability interests of hotel guests are present but not consistent.

Figure 16. shows the behaviors and interests related to sustainability and responsible practices.

PRO-SUSTAINABILITY BEHAVIOURS	
Never or rarely	**Very often**
Ask for hybrid taxi	Willing to pay more for eco-certified products or services
Ask for eco-certified excursion and activity providers in Dubai	Reuse room towels
	Use public transport (bus, metro, tram)
PRO-SUSTAINABILITY INTERESTS	
Low interest	**High interest**
Hotel's eco-certification	In eco and sustainability initiatives in hotels
What hotels do to prevent global warming	To try the local cuisine
What hotels do to minimize their carbon footprint	In what hotels do to minimize water consumption
If hotels support any local charity	In what hotels do to contribute to the local community
If hotels practice energy conservation (efficient lighting, smart thermostat, etc.)	
If hotels use solar energy	

Figure 16. Summary of guests pro-sustainability interests and behavior

9. MEDIA CHANNELS AND INFORMATION SOURCES

9.1 PRE-TRAVEL PHASE

General Information Sources

When comes to watching, listening, and following different media channels in their everyday life, there are slight differences between the three segments. TV is the most dominant media channel among Dubai tourists, since around 1/3 of all respondents use it regularly. However, amongst all available information sources, online media channels prevail when compared to traditional media (TV, radio, magazines, and print newspapers). The results of our survey are in line with global media-consumption reports, showing that consumers prefer digital media. Only a few markets still show the resilience of traditional media, such as the USA, due to the enduring popularity of linear TV, and a couple of Western European markets (Belgium, France, the Netherlands, and Germany), that are still relatively less enthusiastic for social networking[1] .

Media channel	Genuine responsible %	Occasional responsible %	Conventional %
TV	34.9	36.6	31.4
Radio	2.4	4.0	7.8
Newspapers (online or print)	6.8	7.7	11.8
Magazines	1.6	1.7	3.9
YouTube videos	25.8	24.5	27.5
Use a search engine (Google, Bing, etc.)	8.4	5.9	2.0
Social networking sites (Facebook, Instagram)	13.7	14.9	7.8
Blogs or Vlogs	1.3	0.7	2.0
Email	2.2	2.5	2.0
Discount sites (for example, Groupon)	1.1	0.0	0.0
Play computer games	1.8	1.5	3.9

Table 10. Media channels used regularly in everyday life

TV is the most dominant media channel among Dubai tourists, since around 1/3 of all respondents use it regularly. However, amongst all available information sources, online media channels prevail when compared to traditional media

Although there is no great difference in the use of traditional media channels among different tourist profiles, Conventional tourists tend to use radio, newspapers, and magazines slightly more regularly, and less TV when compared to the Genuine and Occasional responsible tourists.

After TV, YouTube videos are the most regularly used across all three segments, reaffirming the importance of video content in general media consumption. Interestingly, Genuine and Occasional responsible tourist segments use social networking sites significantly more than the Conventional tourists who still like to read newspapers (12%). At the same time, conventional tourists use search engines less frequently. This is in line with findings suggesting that eco-consumers use social networks the most when actively researching brands/products .

After TV, YouTube videos are the most regularly used across all three segments, reaffirming the importance of video content in general media consumption.

[1] https://cdn2.hubspot.net/hubfs/304927/Downloads/Digital%20vs%20Traditional%20Summary%20-%20Q1%202017.pdf

9.2 THE TRIP PLANNING PHASE

When planning a trip, Dubai visitors in most cases get informed about Dubai through friends and family recommendations (32-38%). Travel agencies and tourism fairs also present important travel information sources for 20-24% of the market. This should not come as a surprise as Dubai is by most perceived as a luxury destination, and for expensive, international trips, offline sources still remain crucial (López, Sicilia, 2011).

When planning a trip, Dubai visitors in most cases get informed about Dubai through friends and family recommendations (32-38%). Travel agencies and tourism fairs also present important travel information sources for 20-24% of the market.

Media channel	Genuine responsible %	Occasional responsible %	Conventional %
Friends and family recommendations	38.00	32.40	31.40
Travel agencies and tourism fairs	19.60	23.80	23.50
Social media	15.70	18.10	21.60
Visitdubai.com (official Dubai tourism website)	11.70	7.90	7.80
Blogs or Vlogs	2.20	3.20	5.90
Booking Websites (Expedia, Booking, etc.)	10.80	9.90	5.90
Review sites (e.g. TripAdvisor)	1.80	4.20	3.90

Table 11. Information sources when planning a trip to Dubai.

Genuine responsible tourists' top information source in the trip planning phase are friends and family which they seem to rely more (38%) than other segments. On the other side, conventional tourists slightly more used social media as a source of information when planning a trip to Dubai. This is in agreement with earlier studies showing that, similarly to the current market trends, the LOHAS market segment highly value suggestions from friends/family in purchasing decisions[1].

Genuine responsible tourists' top information source in the trip planning phase are friends and family which they seem to rely on more (38%) than other segments.

[1] http://www.lohas.se/wp-content/uploads/2015/07/Understanding-the-LOHAS-Consumer-11_LOHAS_Whole_Foods_Version.pdf

9.2.1 SOCIAL MEDIA

Preferences towards the type of social media information sources about the destination

Social media networks present an incredibly powerful platform that can facilitate the move towards sustainable tourism and responsible tourist behaviors. Therefore, the following section will focus on the online behaviour of Dubai visitors related to social media.

The results of this survey are very promising as the highest percentage (over 90%) of Genuine responsible tourists follow official social media accounts of destinations and tourist attractions.

Statements	Genuine responsible %	Occasional responsible %	Conventional %
I follow official social media accounts of destinations/ tourist attractions.	90.4	79	66
I follow a hotel/restaurant/ club's social media accounts after visiting them at the destination.	83.4	67	43
I prefer unofficial sources of information for a destination (for example, influencers).	66.2	62	41

Table 12. Preferences towards the type of social media information sources about the destination

The results of this survey are very promising as the highest percentage (over 90%) of Genuine responsible tourists follow official social media accounts of destinations and tourist attractions. They also follow hotels', restaurants' and clubs' social media accounts after visiting them at the destination. This shows that social media are great tools for establishing long-lasting relationships with this market segment. Around 80% of the Occasional responsible tourists also follow official social media accounts of destination marketing organizations, yet show slightly less enthusiasm for these channels (79%). The hardest to reach are conventional tourists, as they exhibit the lowest interests for destination-related content on social media. However, the official social media accounts of destinations and tourist attractions are still interesting for 66% of them, which is over 20% more than accounts of individual tourism service providers (hotels/restaurants/clubs).

The hardest to reach are conventional tourists, as they exhibit the lowest interests for destination-related content on social media.

9.3 DURING AND POST TRAVEL PHASE
Sharing information about travels

The research results in Figure 4. clearly show that the vast majority of tourists across the segments share posts about their travel on social media, with Genuine responsible tourists leading the way with 86%. In the case of Occasional responsible tourists, more than 2/3 of them are avid travel-information disseminators. As expected, conventional tourists are less active in this matter, still more than half of them share information about their travel on social media. This is a valuable finding, as Genuine responsible tourists, together with the Occasional ones, can be used for further dissemination of destination-related messages, including those related to sustainability initiatives.

The vast majority of tourists across the segments share posts about their travel on social media, with Genuine responsible tourists leading the way with 86%.

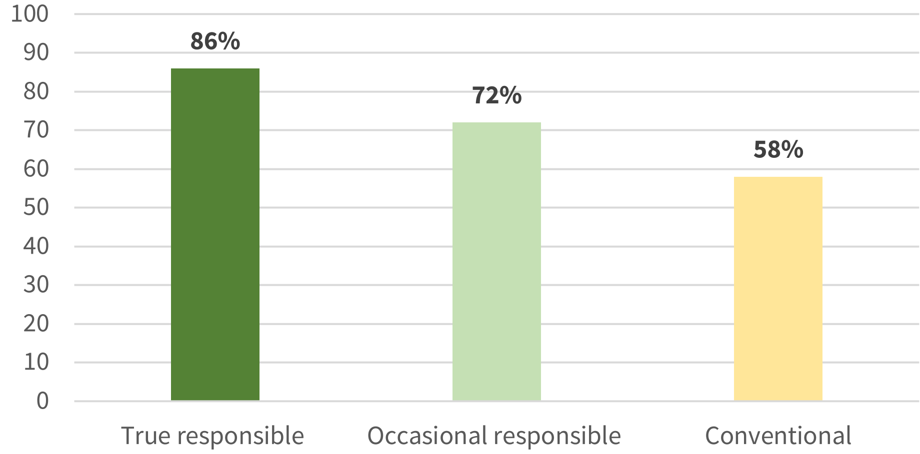


Figure 4. Percentage of tourists who share posts about their travels on social media

In this study, we particularly wanted to determine which social media networks tourists use the most, to share information about their visit to Dubai. Not surprisingly, Facebook, Instagram, and Twitter were the most popular general social media sites, while social media accounts of travel-related websites (Expedia, TripAdvisor, and Booking.com) were used far less (2-8%) by all three market segments.

Interestingly, the more sustainability-inclined tourists are, the more they prefer to share information about their visit to Dubai on Facebook (50% of Genuine responsible tourists). The opposite pattern is observed when it comes to Instagram – the more conventional they are the more they prefer sharing travel information on Instagram. Conventional tourists also use Twitter more than responsible tourists. There are no major differences in using other media channels for posting information about Dubai.

It should be noted that Facebook and Instagram, in particular, are social media sites that predominantly rely on pictorial and video context, which generally induce the largest engagement among social media users, including responsible tourists (Lee, Lee, Moon, & Sung, 2015). Thus, all other popular regional or national social media options similar to Facebook and Instagram[1], especially for Chinese and Russian markets, are of interest for sharing information about trips to Dubai.

Facebook, Instagram, and Twitter were the most popular general social media sites

Table 13. Social media used to share information about the visit to Dubai

Social media	Genuine responsible %	Occasional responsible %	Conventional %
Facebook	49.9	44.6	25.5
Instagram	19.7	24.5	37.3
Twitter	6.8	6.9	17.5
Expedia	3.5	2	3.9
TripAdvisor	4.8	4.7	5.9
Booking.com	6.2	7.7	2
Pinterest	0.9	1	0
Tencent video	0.4	0	2
WeChat	0.9	1.2	3.9
QQ	0.2	0.2	0
Weibo	0.2	0.2	0
VK	0.9	0.2	2
Toutiao	0.2	0	0
Blogs	1.8	1.7	2

[1] https://www.smartinsights.com/social-media-marketing/social-media-strategy/new-global-social-media-research/

9.4 Pro-environmental behavior on social media sites

Genuine responsible tourists exhibited the most sustainability-oriented and pro-environmental behavior social media behaviour. Tourists in this segment are already members of social media groups that are focused on sustainability (83%) and they openly share concerns about the environment on social media (82%). Positive and negative sustainability-related information about travel destinations influences their destination choices (89%) and they strongly believe that destinations and tourism providers should promote their sustainable practices (91%). They are also very proactive and would personally engage in a social media campaign to support sustainability goals if offered an incentive (88%). Occasional responsible tourists share similar social media behaviour patterns as the Genuines but are less proactive and engaged across all offered variables (Table 14).

Genuine responsible tourists exhibited the most sustainability-oriented and pro-environmental behavior social media behaviour.

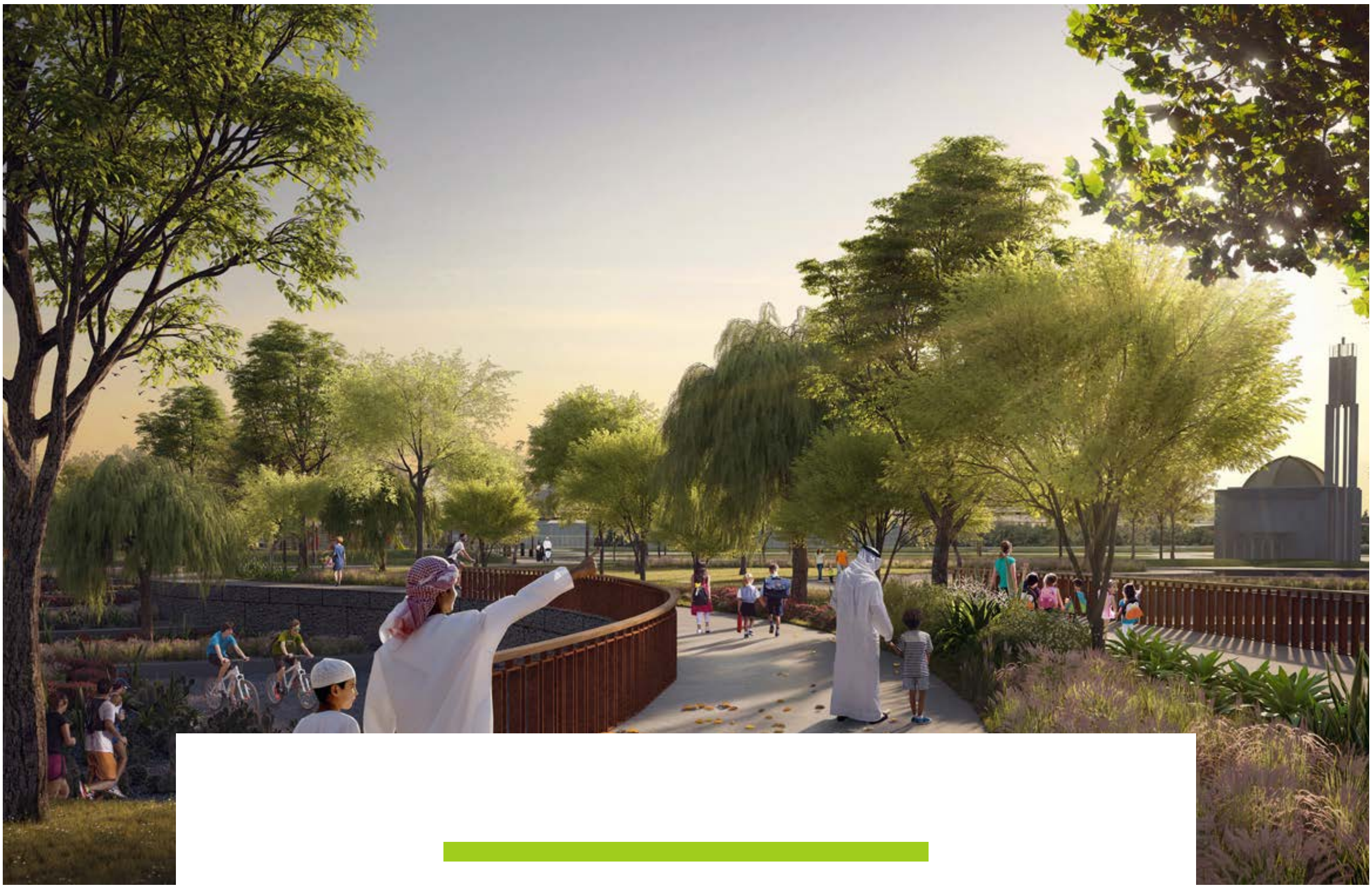
Behavior	Genuine responsible %	Occasional responsible %	Conventional %
I am a member of a social media group (for example, a Facebook group) that is focused on sustainability.	82.9	63	48
I openly share my concerns about the environment on social media.	82.4	64	51
Positive sustainability-related information about a destination encouraged me at least once to visit that destination.	88.9	73	46
Negative sustainability-related information about a destination prevented me at least once from visiting that destination.	70.5	59	35
I believe that destinations and hotels should promote their sustainable practices.	91.3	81	64
I would engage (for example, send photos or videos) with a social media campaign to support sustainability goals if I'm offered an incentive (for example a discount)	88.5	78	54

Table 14. Pro-environmental behavior on social media sites

In terms of sustainability marketing, previous research shows that well informed, educated, and motivated tourists can help in achieving sustainability goals (UNEP, 2005). This is largely confirmed by the current survey of Dubai visitors, as the findings suggest that responsible tourist segments are far more engaged in pro-environmental behavior. This suggests that social media present a good option for further promotion and engagement of those market segments but also for raising awareness among less sustainability-inclined groups. At the same time, social media networks have the highest potential, amongst all media channels, to encourage conventional tourists to make more sustainable choices, making them the best tool for reformative and transformative sustainability marketing (Kemper, Ballantine, 2019; Strähle, Gräff, 2017).

Social media networks have the highest potential to encourage Conventional tourists to make more sustainable choices.

In terms of sustainability marketing, previous research shows that well informed, educated, and motivated tourists can help in achieving sustainability goals



CONCLUSION

In conclusion, the study of the responsible tourist profile of Dubai showed that Dubai responsible tourists mainly show similar behavior as sustainable, responsible, and ethical tourists, defined by previous studies in the field. This research also provided a deeper understanding of how those tourists behave before, during and after the trip, how they choose tourist destination, what is important enough for them to pay extra, how they behave online, and finally what is their detailed profile. This information is an important input for the creation of suggestions and recommendations for reaching out to responsible tourists, creating media channels recommendations as well as shaping tourism offer and activities based on the needs and preferences of this target segment.

VISITORS' PROFILES KEY INSIGHTS

Analysis of the segments' sociodemographic profile, showed certain differences between Genuine responsible, Occasional responsible, and Conventional tourists which are further described in the narrative of the segments' profiles.

1. Genuine responsible tourist profile

Genuine responsible tourists in Dubai are highly sustainability-minded and make up 22% of the Dubai tourist market. They are mostly Millenials, predominantly in the Gen Y.2 age group (30-40). They tend to be very well educated (graduate and postgraduate degree holders), full-time employed with high income, mainly married without children or with children who are 6-12 years old.

Genuine responsible tourists are interested in sustainable living, green and eco-initiatives. In this study, they showed a high level of familiarity with all sustainability terms, especially global warming, recycling, and renewable energy. This market segment values the environment, social justice, and they are very familiar with all eco-certifications. As a result, this market segment is far less price-sensitive and spends more at the destination than the rest of the tourist market. They demonstrate highly sustainability-oriented behaviour when travelling and a majority of them are ready to pay 20% or more for responsible travel options. They are especially ready to pay if accommodation is eco-friendly, money supports a local charity, and tourism staff have good wages and working conditions.

Genuine responsible tourists in the current study not only care about environmental and social issues, but this attitude is also reflected in their healthy lifestyle and commitment to personal development. Most of them meditate, go to the gym, and practice outdoor activities. When at the destination, they engage in outdoor activities (camel and horse riding, biking, hiking, safari, etc.), visiting museums and other cultural attractions and experience traditional arts and Bedouin life.

They are avid, independent travellers and like to go to destinations that they have never visited before. They very much appreciate crowd-free, clean beaches and enjoy experiencing different cultures, highly value interaction with local people and the local cuisine and interesting sightseeing options. This indicates that they are seeking 'green' and authentic experiences, but also a deeper meaning in vacation which can be reflected in engaging with local culture and contributing to saving destination environment (CREST, 2009; Booking. com, 2019b).

Genuine responsible tourists closely coincide with Lohas, a conscious-consumer market segment in the US (NMI, 2011). In Dubai tourist market, this segment mostly comes from India, UK, Pakistan, and the Philippines.

In terms of media and information sources, they tend to watch TV, YouTube videos and use social media. For information about destinations and traveling options they rely on friends' and family recommendations, travel agencies, and tourism fairs. Their travel choices are also affected by positive and negative sustainability information about destinations. Genuine responsible tourists are avid social media users and post about their travels on Facebook. They follow official social media accounts of destinations and tourist attractions and openly share their concerns about the environment, and support sustainability goals across different social media networks.

Sociodemographic characteristics of the sustainability-related tourist profile

**only the distinct characteristics of each tourist segment are presented*

GENUINE RESPONSIBLE TOURIST 21.9%

Dominant age:
30-40 years - 45.2%
25-29 years - 21.3%

Dominant education:
Postgraduate - 37.2%
Bachelor - 35%

Employment status:
Full-time employed - 78.2%
Part-time employed - 12.8%

Monthly household income:
US$3001-5000 - 34.1%
Above US$5000 - 21.3%

Marital status:
Married - 65.4%
Single - 32.1%

Age of children:
No children - 38.6%
6-12 years old - 34.4%

Dominant country of origin:
India
Pakistan
UK
Philippines

2. Occasional responsible tourist profile

This is by far the largest of the three segments and represents 64.5% of the Dubai tourist market. The majority of Occasional responsible tourists are 30-40 years of age, hold a degree and are full-time employed with a middle to high income. Most of them are married and either have no children or have children under 12. They mainly come from China, the USA, Saudi Arabia and Canada. Overall, Occasional responsible tourists are moderately sustainability-minded and demonstrate positive sustainable attitudes and behavior.

Occasional responsible tourists show a high understanding of sustainability terms, being the most familiar with terms such as global warming, recycling, and renewable energy. When it comes to eco certifications, they show a medium level of familiarity, yet they easily recognise The Recycling Symbol and The Energy Star label.

Their average expenditure is about US$1001-3000 per trip and they mainly spend money on shopping, food and excursions. The majority are willing to pay 5% more for responsible tourism options, with their top priorities being: the preservation of the local natural environment, the reversal of some of the negative environmental impacts of tourism, supporting a local charity and eco-friendly accommodation. They believe that life is more about experiences than material possessions and in line with that seek experiential travel and authentic experiences. They prefer to book their trips via environmentally certified travel providers and stay in eco-certified accommodation and donate to charity.

This segment chooses to travel to destinations that they have never visited before, with interesting sightseeing options and where they can experience different cultures. For them, it is important that destination possesses crowd-free and clean beaches and provides an opportunity to interact with local people.

In their everyday life, they mostly practice yoga, pilates and outdoor activities and go to the gym. At destination they prefer outdoor activities, visiting museums, monuments, and other cultural attractions and festivals.

TV, YouTube, and social media networks are their main sources of daily information. When it comes to traveling and destinations they rely a lot on friends' and family's recommendations, but also travel agencies, tourism fairs, and social media. When choosing where to travel, they are largely affected by sustainability-related information related to destinations. Occasional responsible tourists tend to share posts about their trips mainly on Facebook and Instagram. They are keen social media users where amongst other things they share their concerns about the environment and support sustainability goals.

Sociodemographic characteristics of the sustainability-related tourist profile

**only the distinct characteristics of each tourist segment are presented*

OCCASIONAL RESPONSIBLE TOURIST 64.5%

Dominant age:
30-40 years - 34.6%
25-29 years - 28.5%

Dominant education:
Bachelor - 38.7%
Postgraduate - 22.8%

Employment status:
Full-time employed - 68.7%
Part-time employed - 12.6%

Monthly household income:
3001-5000US$ - 32.8%
1001-3000 US$ - 31.1%

Marital status:
Married - 52.8%
Single - 42.6%

Age of children:
No children - 42.6%
Under 6 years - 22%
6-12 years old - 22.2%

Dominant country of origin:
China
Saudi Arabia
Germany
USA
Canada

3. Conventional tourist profile

Conventional tourists tend to be the youngest of the three segments, 24 to 30 years old, with a slightly lower level of education and lower income than the more responsible tourist categories. This is understandable since a large percentage is still studying and only some are full-time employed. They are predominantly single, with no children. There is no dominant country of origin for this market segment.

Conventional tourists represent 13.6% of the Dubai tourist market and show medium to low familiarity with sustainability-related terms and eco-certifications. They are very familiar with the terms recycling, renewable energy, and hybrid cars, which they likely to hear in their everyday life. Somewhat surprisingly, they are not very familiar with terms such as carbon footprint, biodegradable, and global warming, which are widely recognized issues and solutions related to environmental sustainability. When it comes to eco certifications, they show low familiarity with eco certificates, though the majority can recognize the recycle symbol.

This segment spends less on their trips than the other two. They mostly spend on shopping and food but also on local transport. Interestingly, this least sustainability-oriented, price-sensitive market segment cares about social responsibility. They are willing to spend 5% on more responsible tourism options, especially when the money goes to the local charity and if the staff at the destination are guaranteed good wages and working conditions. On the other hand, they are not willing to pay extra for eco-friendly accommodation nor locally produced food.

Conventional tourists mostly do not consider responsible choices when planning and going on their travel. Still, they highly value the availability of crowd-free and clean beaches, experiencing different cultures, opportunities to explore independently, and the opportunity to interact with local people.

In their everyday life, conventional tourists practice yoga, pilates and outdoor activities or regularly exercise in the gym. At the destination, they mostly practice outdoor activities and more than other segments they engage in volunteering. This coincides with Booking.com's (2019a) research findings, which showed that Gen Z are most interested in volunteering as a travel experience.

The general information sources they use the most are TV and YouTube videos. They use a variety of information sources when planning a trip, mostly friends and family, travel agencies, and tourism fairs but also social media. When posting about the destination, the main channels they use are Facebook, Instagram, and Twitter. They do not tend to follow official social media accounts of destinations and show less willingness to share concerns about the environment and sustainability goals on social media. In line with that, they are less affected by any sustainability-related information when deciding where to travel.

Sociodemographic characteristics of the sustainability-related tourist profile

**only the distinct characteristics of each tourist segment are presented*

CONVENTIONAL TOURIST
13.6%

Dominant age:
24-30 years - 29.5%
30-40 years - 27.9%

Dominant education:
College - 36%
High school - 21.3%

Employment status:
Full-time employed - 59%
Students - 13.1%

Monthly household income:
1001-3000US$ - 42.6%
3001-5000 US$ - 21.3%

Marital status:
Single - 45.9%
Married - 32.8%

Age of children:
No children - 49.2%
Under 6 years -19.7%

Dominant country of origin:
No dominant country of origin

STAGE 1
SECTION B

The current perception of Dubai as a sustainable tourism destination

The impact of sustainable practices on destination choices

The impact of Expo on destination choices

CHAPTER 3 - LITERATURE REVIEW

CSRE
THE CENTRE FOR SUSTAINABILITY THROUGH RESEARCH & EDUCATION

This chapter provides a comprehensive review of the currently available academic literature and non-academic market reports available online. It aims to provide insight into the effect of sustainability on destination choices, give an overview of Dubai's image as a tourist destination and later focusing on providing a brief info about World EXPO concept, EXPO Dubai 2020, Mega-events benefits and World Expos impact on destination choice in the pre-event phase.

The first part reviews secondary sources connecting the sustainability concept with the level of impact it has on the mind of a consumer. Analysing several studies, it provides an insight into the preferences of responsible tourists and how this affects destination choices.

The second part is closely connected to the first as it gives us a brief overview of consumer perception of a sustainable tourist destination. Several studies were analysed to define factors that affect the perception of certain destinations as being sustainable.

The third part looks into past research related to Dubai's image as a tourist destination, defining several themes that are part of Dubai's image.

The fourth part focuses on the World Expo concept, followed by the fifth section underlying Expo 2020 Dubai, penultimately shifting to the mega-events benefits researched in the sixth section and focusing on their impacts on image, economy, culture, and community. The final part analyses the World Expo pre-event research and its impact on destination choices and intention to visit.

This chapter consists of the following:

CHAPTER 3 HIGHLIGHTS

The effect of sustainability practices on destination choice

ITB Berlin 2019 statistics showed that among all analysed products and brands, tourists show the most interest in sustainable tourism, which demonstrates the rising significance of sustainability and sustainable tourism.

More than half (53%) of sustainable travellers in the US report that sustainable practices at the destination were a driver of their destination choice.

63% of all travellers in the survey done in the US say they are much more likely to consider destinations where there is a strong effort to conserve and protect natural resources

Lonely Planet's annual Travellers' Pulse survey reveals that 90% of travellers show a high level of awareness and desire to conduct a responsible, low-impact trip.

Over half of sustainable travellers purchased something from a travel company because they offered experiences that reflect the unique character of the destination (57%), educated customers about those unique features (54%), or provided local products (54%).

Perception of a sustainable tourist destination

Regarding travel destinations sustainability, numerous studies on tourism consumer behaviour indicate that there is a growing awareness of the environmental, social and cultural impacts that can be generated by tourism activity.

If a country wants to differentiate itself in the market as a destination that carries out practices and offer tourism products of a “sustainable” nature – i.e. a “sustainable” destination - the image that it conveys will be crucial in encouraging more visitors to appreciate and value these issues.

Dubai’s image as a tourist destination

Dubai’s image could be described as a modern wealthy city providing luxurious facilities as a sea, sun and sand destination that combines leisure with extensive shopping facilities.

Several themes are part of Dubai’s image: (1) man-made attractions, (2) culture and heritage, (3) fashion and luxury, (4) business, (5) sun and beach, (6) food and dining, (7) desert and nature, (8) skyline and sightseeing, (9) leisure and relaxation, (10) Dubai Metro and Emirates, (11) Art and architecture, and (12) sports and adventure.

Organic marketing or word-of-mouth and e-WOM through social media have a much greater impact on first-time visitors.

Positive social media presence, such as the Visit Dubai website and creating and supporting travel community networks, are seen as the best sources for creating and shaping the image of Dubai.

About World Expo

International exhibitions have been considered to be important in the science and technology fields due to their multiple impacts on society.

They attract millions of people from different regions of the world, stimulating dialogue between scientists and their audience.

World Expos, as one of the oldest and largest international events arranged and assisted by governments, represents "a festival of wonder and imagination, where visitors can experience, explore, discover and have fun while sharing ideas and working together" (Expo, 2020).

Expo 2020 Dubai

The events industry is one of the key drivers of economic growth of Dubai and UAE

From 2006-2010, the country has managed to double the scale of its exhibition infrastructure. More than 1.5 million visitors travel to the UAE annually to take part in over 300 events, including more than 100 mega exhibitions and conferences

The legacy of Expo 2020 is represented by greater economic development and worldwide publicity of Dubai.

Infrastructure projects, such as the metro and pavilions, will boost the economy and the tourism sector.

This particular mega-event is a crucial component of the wider nation branding strategy.

Expo 2020 will create more than a quarter of a million jobs in different sectors, including aviation, banking, construction, education, healthcare, hospitality, manufacturing, retail, real estate, technology and tourism.

Research conducted in March 2019 showed that Dubai residents are confident Expo 2020 will deliver a positive impact on the economy, society and culture

World Expos - impact on destination choice in the pre-event phase - intention to visit host destination

In the past, there has been no research in the pre-event phase of the potential impact of the World Expo on visiting host destinations.

Despite the popularity of mega-events, very little is known about whether hosting of mega-events actually leads to a change in attitude towards the host country.

Only 50% of those intending to visit Expo actually visit the event.

Stronger intentions to visit Expo actually lead to a higher percentage of visitation.

Those who have not visited a particular destination may have little understanding of the destination.

Stereotypical perceptions of Dubai persist.

Destination image is linked to intent to travel

Mega Events Benefits

Events can attract tourists (and others, such as sponsors and the media) who otherwise might not visit a particular destination.

Event tourism can be leveraged for maximum value in combatting seasonality of demand, spreading tourism geographically and assisting in other forms of urban and economic development.

Events can create a positive image for a destination and help brand or re-position cities.

Events contribute to place marketing by making cities more liveable and attractive.

Events animate cities, resorts, parks, urban space and venues of all kinds, making them more attractive to visit and re-visit, and utilizing them more efficiently.

Event tourism acts as a catalyst for other forms of desired development, thereby generating a long-term or permanent legacy

Events attract international attention and contribute to before and after event perception of tourists towards a destination

Benefits to the host city/country can be numerous and can extend to the residents.

Mega-events have a long history of boosting image, tourism, and development in general in the host destination.

1. The effect of sustainability practices on destination choice

In recent years, the concept of sustainability receives significant attention among both travellers and tourism providers. Subsequently, interest in responsible travel and sustainable tourism is rising, making a significant influence on destinations to adhere to the new demand requirements. In connection to this, tourists today value sustainability more than before and consider it an important factor for choosing travel destinations (Pulido-Fernández & López-Sánchez, 2014). The recently held fair in ITB Berlin 2019 and statistics released afterward demonstrate the rising significance of sustainability and sustainable tourism. Their research showed that among all analyzed products and brands, tourists show the most interest in sustainable tourism (Figure 1).

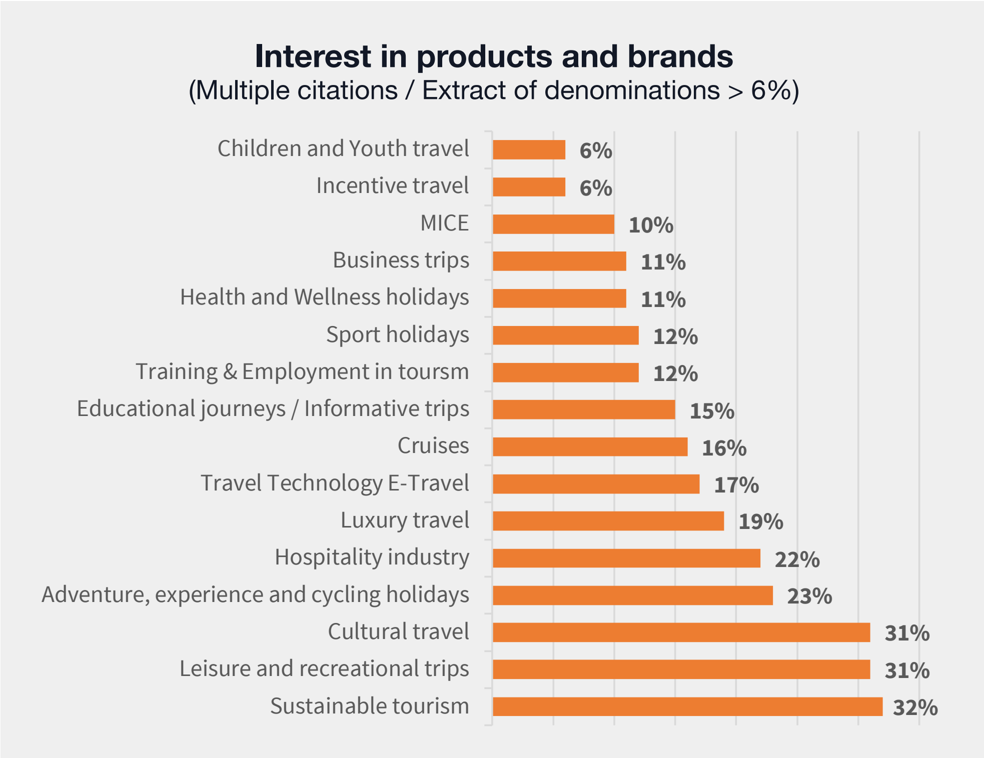


Figure 1. Source: ITB Berlin https://www.itb-berlin.com

A recent report by Sustainable Travel International and Mandala Research showed that a majority of travellers in the United States spend more money per trip, travel more frequently and stay longer when destinations offer sustainable practices. In addition, the 2016 Role of Sustainability in Travel & Tourism report[1] conducted by Visit California, which was created to help the travel and tourism industry better understand how sustainable practices are affecting their travel decisions and behaviours, revealed that 60 percent of U.S. travellers (105.3 million) have taken a "sustainable" trip in the last three years. The report revealed the importance of the sustainable tourism market, as those travellers spend more (on average $600 per trip), stay longer (seven days compared to four days) and bring higher benefits to local communities, including job creation and volunteering. This study indicates that tourists, especially Californian tourists, value and intentionally seek sustainable tourism options. This research, which included approximately 2,000 travellers, revealed that more than half (53%) of sustainable travellers report that sustainable practices at a destination were a driver of the destination choice. For 28% of travellers, sustainable practices are the main factor for destination choice, while 25% of them state sustainable practices are helping them choose between destinations. An important finding highlights that 63% of all travellers say they are much more likely to consider destinations where there is a strong effort to conserve and protect natural resources. This number rises to 75 percent amongst sustainable travellers.

More than half (53%) of sustainable travellers report that sustainable practices at a destination were a driver of the destination choice.

Moreover, 65% of travellers feel a great responsibility to ensure that their trip has a positive impact on the place they visit, while more than 60% of all travellers feel strongly about their obligation to leave an area in the same or better condition than they found it. Over half of sustainable travellers purchased something from a travel company because they offered experiences that reflect the unique character of the destination (57%), educated customers about those unique features (54%), or provided local products (54%). This goes in line compares with approximately a fifth of all leisure travellers who say they would make purchases based on these characteristics.

63% of all travellers say they are much more likely to consider destinations where there is a strong effort to conserve and protect natural resources.

[1] https://www.greenlodgingnews.com/sustainable-practices-drive-destination-choice-for

The Lonely Planet's annual Travellers' Pulse survey, which included 24,500 people from 144 countries, indicates that 70% of travellers had purposefully travelled in a low-impact way in the past, (for example catching a bus rather than flying) and over 90% of people said they would or might do so in the future, indicating a high level of awareness and desire to conduct a responsible trip. The study also indicates that 84% of respondents would consider offsetting their emissions in the future, while 79% of respondents said they would or might volunteer overseas. According to this survey, travellers also showed good intentions when it comes to protecting the environment. Although 36% of people had never purposefully considered the environment in their past travels, 93% of people said they would or might purposefully partake in environmentally-friendly travel in the future.

It is worth emphasizing that before deciding where to travel, tourists make different decisions related to different elements of a tourism offer, such as the location (destination), transport, accommodation, activities, etc. as a part of the destination experience (Seddighi & Theocharous, 2002). Thus, sustainable solutions for all components of a destination offer (eco-friendly accommodation, environmentally friendly activities, etc.) can influence their decision to visit a certain place. The increasing popularity of certain destinations makes them overcrowded, causing different environmental and community problems. This makes the place less attractive for tourist visits (European Commission, 2004).

Whilst at the destination, one of the tourist activities with a high potential to generate environmental problems is the choice of local transportation, which contributes to increasing air pollution, congestion, noise and the risk of accidents in the region (European Commission, 2004). Some of the tourist entertainment activities may also have a negative impact on destinations by disturbing biodiversity habitats, overusing the natural space (Snepenger et al., 2007), or being energy-intensive such as panoramic flights (Becken & Patterson, 2006). Sustainability of destinations also reflects the way the local community supports tourism development and how beneficial tourism activities are for them (Snepenger et al., 1998). As a response to the negative consequences and image that unsustainable practices can create, destinations favour adapting their offer to adhere to sustainability principles. Sustainable destination practices in all components of the tourism offer (including transport at the destination, accommodation, energy efficiency, responsibility towards the local community and environment, etc.) are important factors influencing traveller choice of a tourism destination. Thus building the image of a sustainable destination and proper communication of sustainability is an important task in attracting a responsible travel market.

Over half of sustainable travellers purchased something from a travel company because they offered experiences that reflect the unique character of the destination (57%), educated customers about those unique features (54%), or provided local products (54%).

2. Perception of sustainable tourist destination

Regarding travel destinations sustainability, numerous studies on tourism consumer behaviour indicate that there is a growing awareness of the environmental, social and cultural impacts that can be generated by tourism activity (Adlwarth, 2010; Dodds et al., 2010; Hedlund, 2011; Kucukusta et al., 2013). Furthermore, there are also some studies concerning the market segments with sustainability-related motivations (Deloitte 2008; Lonely Planet, 2007; Rheem 2009; Wehrli et al., 2011). Therefore, if a country wants to differentiate itself in the market as a destination that carries out sustainability-focused practices and offers tourism products of a “sustainable” nature - i.e as a “sustainable” destination - the image that it portrays will be crucial in encouraging more visitors to appreciate and value these issues.

In line with recent trends of responsible behaviour, a new index called Greendex was launched, compiled annually by the National Geographic and GlobeScan. Greendex measures the way consumer patterns are responding to environmental concerns. The study includes about 18,000 consumers from 18 countries, and it measures their habits in different areas, including energy conservation, food purchases, transportation habits, preferences in terms of organic and conventional products and environmental knowledge and attitude. Most of the elements listed here are also important components of the perception of a certain destination as sustainable (National Geographic (2009). Among 18 countries surveyed on sustainability, India obtained first place, scoring high in housing, transportation and food choices. China was the second-most sustainable country followed by South Korea, while the United States and Canada scored lowest on in all aspects except for food choices. Information gathered through the Greendex survey might be very useful for destination managers when deciding how to attract responsible travellers and on what markets to focus their communications, whilst trying to build the image of a sustainable destination (National Geographic, 2009).

The literature in this field mentions numerous important factors affecting the perception of certain destinations as sustainable (Table 1).

The study done by Pulido-Fernández and López-Sánchez (2014) concluded that there are certain elements of a destination image that tourists perceive as attributes of a sustainable destination. The authors listed the following elements, ranked by the degree in which they describe sustainable destinations: Public safety, Customer service and care, Good value for money, availability of local products and services, Good relationship and attitude of residents towards tourism, Quality of the urban environment (cleanliness, traffic, noise, etc.), Quality of the natural environment, Accessibility (communication network, access, ect.), Availability of an urban transport system, It is not an overcrowded destination and Availability of a cultural programme. Rebollo and Baidal (2003) argue that there are three basic dimensions of sustainable development (preservation of natural and cultural resources, economic viability and social justice) that can be measured in the context of tourism development. Mathew and Sreejesh (2017) explored 4 dimensions of destination sustainability economic, social, cultural and environmental. Some of the indicators were: tourism integrated economy, social sustainability benefits to backward people, social programs and schemes, empowerment of local communities, congestion, infrastructure development, cultural sustainability management and conservation of heritage sites, quality of landscapes and environment environmental pollution, disturbance and noise, etc. Perez et al. 2017, in their study intended for measuring the sustainability of Cuban tourism destinations, extracted 3 dimensions of destination sustainability: economic, social and patrimonial. Their sustainability index, also includes tourists' perspective related to cultural resources and heritage conservation at the destination, destination cleanliness, perception of destination's security, quality of tourist offer, the quality of public services (lighting, transport, banks, etc), the offer of activities involved with the natural resources of the destination, quality of access roads and events signalization, quality of tourism's employees (Lodging, gastronomy and tour guides), relation quality—price of lodging in a destination (state or private) and relation quality - price of restaurants in the destination.

UNWTO (2004) has also defined a guidebook of Indicators of sustainable development for tourism destinations, explaining 13 categories of sustainability indicators with many subgroups. The guidebook explains how to develop indicators and how to maintain them in practice.

Environmental dimension	**Source**
Quality of the natural environment	Pulido-Fernández and López-Sánchez (2014)
Quality of the urban environment (cleanliness, traffic, noise..)	Pulido-Fernández and López-Sánchez (2014)
The offer of destination activities involved with the natural resources	Perez et al. (2017)
Destination cleanliness	Perez et al. (2017)
Quality of landscapes and environment	Mathew and Sreejesh (2017)
Environmental pollution	Mathew and Sreejesh (2017)
Disturbance and noise	Mathew and Sreejesh (2017)
Preservation of natural resources	Rebollo and Baidal (2003)
Protection of valuable natural assets	UNWTO (2004)
Managing scarce natural resources	UNWTO (2004)
Limiting the impact of tourist activity	UNWTO (2004)
Controlling tourist activities	UNWTO (2004)
Sustainability of tourism operations and services	UNWTO (2004)
Destination planning and control	UNWTO (2004)
Designing sustainable products and services	UNWTO (2004)
Economic dimension	**Source**
Good value for money	Pulido-Fernández and López-Sánchez (2014)
Availability of local products and services	Pulido-Fernández and López-Sánchez (2014)
Accessibility (communication network, access, ect.),	Pulido-Fernández and López-Sánchez (2014)
Availability of an urban transport system	Pulido-Fernández and López-Sánchez (2014)
Quality of access roads and events signalization	Perez et al. (2017)
Quality of tourism's employees	Perez et al. (2017)
Relation quality—price of lodging in destination (state or private)	Perez et al. (2017)
Relation quality - price of restaurants in the destination	Perez et al. (2017)
Quality of tourist offer in the destination.	Perez et al. (2017)
Tourism integrated economy	Mathew and Sreejesh (2017)
Congestion	Mathew and Sreejesh (2017)
Infrastructure development	Mathew and Sreejesh (2017)
Economic viability	Rebollo and Baidal (2003)
Capturing economic benefits from tourism	UNWTO (2004)
Social dimension	**Source**
It is not an overcrowded destination	Pulido-Fernández and López-Sánchez (2014)
Public safety	Pulido-Fernández and López-Sánchez (2014)
Customer service and care	Pulido-Fernández and López-Sánchez (2014)
Good relationship and attitude of residents towards tourism	Pulido-Fernández and López-Sánchez (2014)
Quality of public services (lighting, transport, banks, etc).	Perez et al. (2017)
Social sustainability benefits to backward people	Mathew and Sreejesh (2017)
Social programs and schemes	Mathew and Sreejesh (2017)
Empowerment of local communities	Mathew and Sreejesh (2017)
Social justice	Rebollo and Baidal (2003)
Well being of host communities	UNTWO (2004)
Community participation in tourism	UNTWO (2004)
Tourist satisfaction	UNTWO (2004)
Health and safety	UNTWO (2004)
Cultural dimension	**Source**
Availability of a cultural programme	Perez et al. (2017)
Conservation of cultural resources and heritage in the destination	Perez et al. (2017)
Cultural sustainability management and conservation of heritage	Mathew and Sreejesh (2017), UNTWO (2004)

Table 1. Important factors of a sustainable destination

Figure 1 shows the summary of dimensions for measuring destination sustainability, based on the literature review. What we can conclude is that sustainability in terms of travel destination, is a comprehensive term encompassing social, environmental, cultural and economic aspects of responsibility. Various authors have developed different indicators to measure sustainable destinations, adjusting them to the differing nature of travel destinations. This review provided an insight into different aspects of measuring destination sustainability, while the final measurement of sustainability of Dubai as a tourist destination will be chosen to be in line with the nature of this tourist destination.

Figure 1. Summary of indicators for measuring destination sustainability

3. Dubai's image as a tourist destination

At the beginning of the 1990s, due to the gradual depletion of its oil reserves, Dubai has started diversifying its economy (Stephenson & Ali-Knight, 2010). This kick-started rapid tourism development which resulted in almost 16 million registered international visitors in 2018 (DTCM, 2019) and an estimated 20 million by 2020 (Zaidan & Kovacs, 2017). Today, Dubai is seen as the luxury capital of tourism, an architectural giant and a sponsor of major events (Coombe & Melki, 2012; Gomba et al., 2018; Zaidan & Kovacs, 2017). Many experts and members of academia consider Dubai as a very strong example of a developed tourism destination (Bagaeen, 2007; Govers & Go, 2009; Stephenson & Ali-Knight, 2010).

Govers and Go (2009, p. 74) claim that Dubai is a "very powerful international brand" mostly due to developed and varied tourism products while Bagaeen (2007, p. 174) describes Dubai as an "instant city" and a "product of a super-fast urbanism". Stephenson and Ali-Knight (2010) state that the leading ideology for developing Dubai is "bigger, better and brasher" when compared to the rest of the world, with the goal to become a financial and tourist centre on par with those that already exist in the West. The city is often described as futuristic and has numerous home-grown brands such as world's tallest hotel (Rotana Rose Tower), the first seven-star hotel (Burj Al Arab), the world's tallest building (Burj Kalifa), the world's largest shopping mall (Dubai Mall) and The World (over 300 small islands that represent the shape of the world) and many others. Dubai is an undisputedly "hyperreal" destination, meaning it predominantly relies on creating new progressive initiatives and reconstructing tourism spaces instead of relying on existing cultural heritage. Visitors of Dubai are much more attracted to the services it provides than to its cultural identity. It often hinges on celebrity endorsements (such as Janet Jackson, Roger Federer, Oprah Winfrey, etc.), giving an impression of it being a "symbolic capital" that celebrates self-governance and political autonomy. Dubai has created an image that has become internationally recognizable, mainly by creating completely new experiences. Elsheshtawy (2010, p. 250) states there is even a trend of a "Dubaization of cities" spreading to other Arab/Muslim cities such as Cairo.

Several themes are part of Dubai's image: (1) man-made attractions, (2) culture and heritage, (3) fashion and luxury, (4) business, (5) sun and beach, (6) food and dining, (7) desert and nature, (8) skyline and sightseeing, (9) leisure and relaxation, (10) Dubai Metro and Emirates, (11) Art and architecture, and (12) sports and adventure (Gomba et al., 2018, p. 392). Dubai image could be described as "a modern wealthy city providing luxurious facilities as a sea, sun and sand destination that combines leisure with extensive shopping facilities" (Govers & Go, 2009, p. 251). Similarly, the study of Gomba and colleagues (2018) suggests that visitors mainly see Dubai as a destination for relaxation and leisure activities.

In order to achieve its current image, Dubai has dedicated a lot of effort into marketing and branding strategies. Interestingly, Gomba and colleagues (2018) claim that usual marketing channels are not the main source on which visitors rely on. Organic marketing or word-of-mouth and e-WOM through social media have a much greater impact on first-time visitors. Positive social media presence such as Visit Dubai and creating and supporting travel community networks are seen as the best sources for creating and shaping the image of Dubai.

4. About World Expos

International exhibitions are considered to be important in science and technology due to their multiple impacts on society (Rosell, 2015). In addition, they attract millions of people from different regions of the world, stimulating dialogue between scientists and the audience (Matos et al., 2012; Rosell, 2015).

World Expos, officially known as International Registered Exhibitions, represent a global gathering of nations dedicated to finding solutions to pressing challenges of our time by offering a journey inside a universal theme through engagement and immersive activities. World Expos welcome tens of millions of visitors, allow countries to build extraordinary pavilions and transform the host city for years to come (Bureau International des Expositions - BIE).

The first World Expo – the Great Exhibition – took place in London in 1851. The concept became popular and was repeated across the globe, demonstrating an unparalleled power of attraction and a record of world-class legacies. Since the BIE was created in 1928 to regulate and oversee these mega-events, World Expos have explicitly been organized around a theme that attempts to improve humankind's knowledge, takes into account human and social aspirations and highlights scientific, technological, economic and social progress (BIE).

Since London's Great Exhibition in 1851, World Expos have been a platform for educational, economic and cultural change (Expo 2020 Dubai, 2018, p. 11) that has served as a bridge between governments, companies, international organisations, and citizens (BIE). The collections of materials used in the context of international exhibitions originated from many science and technology museums, such as the Science Museum in London and the Technisches Museum in Vienna (Rosell, 2015). Also, several inventions were shown in these exhibitions for the first time, such as Bell's telephone and Edison's electric light bulb. They stimulated the construction of structures such as the Eiffel Tower in Paris (built in 1889) acting as a symbol of the progress brought by the industrial age (Matos et al., 2012; Rosell, 2015). From the beginning, these exhibitions were seen as an opportunity to communicate with visitors about scientific, technological and economic progress. Their political dimension also pertained to the international struggle for power on the world stage (Abbattista, 2014; Pinto, 2018). To date, over 50 expos (including World Expos, International Specialised Expos, Horticultural Exhibitions, and the Design Triennale of Milan) have been organised under the auspices of the BIE (Expo 2020 Dubai, 2018).

The World Expo, as one of the largest international events, arranged and assisted by governments, represents "a festival of wonder and imagination, where visitors can experience, explore, discover and have fun while sharing ideas and working together" (Expo 2020 Dubai, 2018, p. 11). An increasing number of countries have shown interest in hosting mega-events, such as the World Expo, the World Cup and the Olympics. These countries try to achieve the goals of increasing international tourism arrivals and receipts, enhancing domestic pride in culture, boosting local economies through hosting events, but also raising awareness of the country or the region associated with the event (Lee et al., 2014).

5. Expo 2020 Dubai

The events industry is one of the key drivers of the economic growth of Dubai and UAE (Ahamed & Cooper, 2014: El Mourad, 2016). From 2006-2010, the country has managed to double the scale of its exhibition infrastructure. More than 1.5 million visitors travel to the UAE annually to take part in over 300 events, including more than 100 mega exhibitions and conferences (Ahamed & Cooper, 2014).

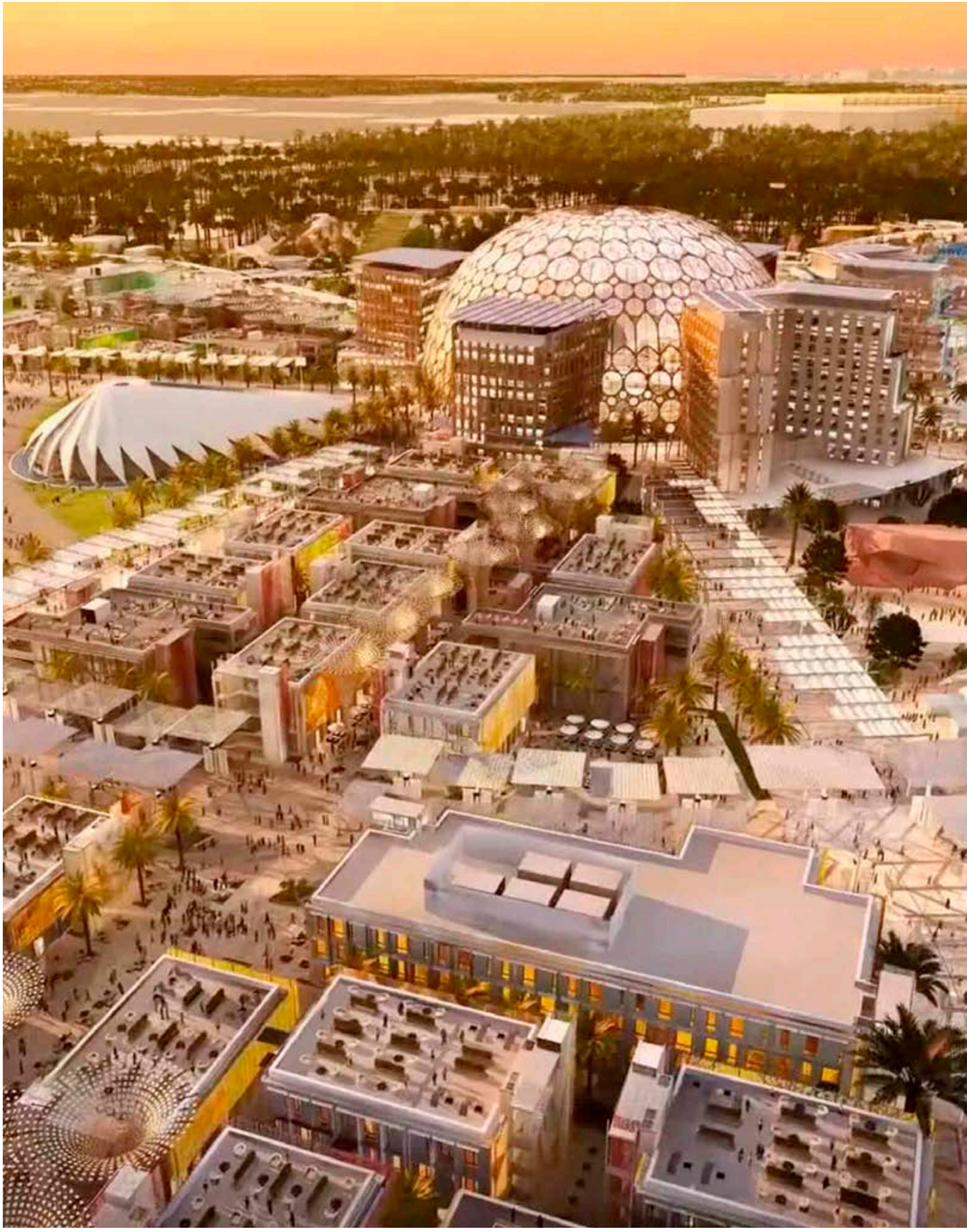
In 2013, Dubai was selected by a record vote by the BIE members to host the World Expo in 2020 – becoming the first Arab nation and the first country in the Middle East, Africa and South Asia (MEASA) region to host this event. Dubai's winning bid was an inspiring collaboration between the UAE's leadership and the event's organisers to plan, design and operate an event with a legacy that would last for generations (Expo 2020 Dubai, 2018, p. 12).

According to a survey developed by Alliance Business Centres, a global business survey provider that operates over 650 business centres with 15,000 companies worldwide, cultural diversity has positioned Dubai as the top pick to host Expo 2020. About 35% of participants said Dubai's openness and cultural diversity were the main reasons qualifying it to host the Expo, followed by its geographical location, world-class infrastructure as well as political and social stability. Dubai is a cosmopolitan city that is inhabited by over 200 nationalities; it is a melting pot of cultures and a meeting point for people from across the globe (Ahamed & Cooper, 2014).

Under the theme "Connecting Minds, Creating the Future", Expo 2020 Dubai is about forging new connections and new partnerships across sectors and geographies to inspire solutions that will shape the future. Within this overarching theme, Expo 2020 has identified three interconnected drivers of progress – Opportunity, Mobility and Sustainability – as subthemes (Expo 2020 Dubai, 2018, p. 12). These subthemes "are a reflection of Dubai's future ambition to become a hyper-connected cosmopolitan techno oasis in the true spirit of globalization" (Editorial, 2019).

The theme and subthemes of Expo 2020 Dubai have been developed to capture the common aspirations that link the UAE leadership's vision for the future (from Vision 2021 through to the 2071 Centennial Plan), regional priorities and global challenges; as reflected in the 2030 Agenda for Sustainable Development and the United Nations (UN) Sustainable Development Goals (SDGs) (Expo 2020 Dubai, 2018, p.12-13). Creating a more sustainable future is a global concern and the concept of sustainability is one of Expo 2020's main subthemes. This event aims to be one of the most sustainable World Expos in history (Expo 2020 Dubai, 2018). Its sustainability strategy includes "four key objectives:

1. Leave a legacy of sustainable infrastructure and cutting-edge sustainability practices
2. Catalyse sustainability efforts in Dubai and the UAE
3. Increase public awareness and engage society about sustainability principles and sustainable living
4. Develop scalable sustainability solutions, extending benefits to the wider economy" (Expo 2020 Dubai, 2018, p. 15).



The Expo 2020 site is located in the Dubai South region and was chosen by optimum operational and logistical efficiency. It is accessible by one-third of the world's population within a four-hour plane journey, and is located mid-way between the cities of Dubai and Abu Dhabi. It is served by three airports, including Al Maktoum International Airport, which is approximately six kilometers from the Expo site centre. Expo 2020 Dubai will be the first Expo that is relatively accessible for many millions of people in the Middle East, Africa and South Asia (Expo 2020 Dubai, 2018, p. 18).

The site will be divided into three pavilions – Sustainability, Mobility and Opportunity. Various countries will build or rent their pavilions in the specific areas that match their growth plan. Since sustainability is at the heart of this Expo, Terra - the Sustainability Pavillion, will be covered by photovoltaic panels that will provide shade and capture more than enough sunlight to create almost half of the energy that will be used on-site during the Expo. Other on-site sustainability practices will include waste and water recycling, reusing materials and monitoring the Expo's carbon footprint. Other ways in which mobility and sustainability will be maintained is through the use of cable cars, as no private cars will be allowed within the Expo site. Once the Expo ends, the three main pavilions – the Welcome Pavilion, the Innovation Pavilion and the UAE pavilion will be connected and converted into a National Museum, further developed and converted into either a university or a research and development centre (Ahamed & Cooper, 2014, p.40).

According to Oxborrow (2019), the legacy of Expo 2020 will be greater economic development and exposure of Dubai. In addition to that, infrastructural projects, such as the metro and pavilions will boost the tourism standing (Sharma et al., 2019). The total number of visits is expected to reach 25 million, with 70% of visitors projected to come from outside of the UAE (Expo 2020 Dubai, 2018, p. 12-13). Since 2013, the World Expo has been used as a focal point for achieving the goals of the tourism vision, mobilizing people, companies, projects, and the entire country towards 2020. This particular mega-event is a crucial component of the wider branding strategy (Saberi et al., 2018). Expo 2020 has also played a significant role in the marketing and branding of Dubai through multiple communication channels (Gomba et al., 2018). Since winning the bid to host Expo 2020, there has been a prediction of positive impacts for Dubai, both tangible, in the form of the physical infrastructure and intangible as reflected by changes to Dubai's policies and procedures. It is estimated that Expo 2020 will create more than a quarter of a million jobs in various sectors, including aviation, banking, construction, education, healthcare, hospitality, manufacturing, retail, real estate, technology and tourism (Nadkarni & Teare, 2019).

According to Ahamed & Cooper (2014), "Dubai is capable enough to be the host of Expo as it has the advanced technology and the money supply in order to build an Expo which the world will remember. Dubai also has the knowledge of how to welcome its guests as most of the revenue Dubai gains is from the tourism sector" (p.43). They also added that the UAE is a multi-cultural country and each one's religion, values, customs and beliefs are respected, therefore Expo visitors will feel less homesick and will enjoy their stay. Moreover, "partnerships will also rise among various companies in various countries and Dubai will make a good profit" (p.43).

"Dubai has differentiated itself from its oil-rich regional peers by leveraging logistics, services, finance and real estate as drivers of its economic growth. It has transformed from a backwater trading entrepôt to a city associated with superlatives – largest, most expensive, tallest, etc., in just a couple of decades" (Editorial, 2019, p.258). Further, its geographical location with pragmatic policies has made Dubai what it is today. As the city moves towards a sustainable future, "the successful bid to host Expo 2020 serves as an acknowledgment and an endorsement by the global community of the strides made thus far" (Editorial, 2019, p.258). The results of the research conducted in March 2019 showed that Dubai residents are confident Expo 2020 will deliver a positive impact on the economy, society and culture (Oxborrow, 2019).

6. Mega events benefits

Events are seen as a key element within the origin area (i.e. events are an important tourism motivator) as well as within the destination area (i.e. events are included in development and marketing plans of most destinations) (Getz & Page, 2016).

Place marketing, often referred to as boosterism, by which events are used to 'boost' visitor numbers and appeal, has emerged as a key feature associated with a unique selling proposition that differentiates the destination from the competition.

According to Getz and Page (2016), the core propositions of event tourism can be seen through several characteristics: a) Events can attract tourists (and others, such as sponsors and the media) who otherwise might not visit a particular place; the

Mega-events have a long history of boosting image, tourism, and development in general in host destinations

spending of event tourists generates economic benefits; event tourism can be leveraged for maximum value in combatting seasonality of demand, spreading tourism geographically, and assisting in other forms of urban and economic development; portfolios of events can be designed for maximum impact, especially by appealing to multiple target segments.

b) Events can create a positive image for the destination and help brand or re-position cities.

c) Events contribute to place marketing by making cities more liveable and attractive.

d) Events animate cities, resorts, parks, urban space and venues of all kinds, making them more attractive to visit and re-visit, whilst utilizing them more efficiently.

e) Event tourism acts as a catalyst for other forms of desired development (including urban renewal, community capacity building, voluntarism and improved marketing), thereby generating a long-term or permanent legacy (p.597).

Mega-events have a long history of boosting image, tourism, and development in general in host destinations (Kim et al., 2012; Gripsrud et al., 2010; Getz &Page, 2016). Getz and Page (2016) add that global cities are now the only destinations able to compete for the most desired mega-events, such as the Olympic Games or World Expos. Mega events can provide the host city with greater visibility and positive media exposure, resulting in an upturn in tourism arrivals and receipts (Jauncey & Nadkarni, 2014). These events attract international attention and contribute to before and after event perception of tourists towards a destination (Kim & Morrison, 2005). They have the potential to change a destination's image through marketing campaigns (Gibson et al., 2008; Gripsrud et al., 2010; Kim & Morrison, 2005), and can have both immediate and longer-term impact on the host county. The 2004 Olympic Games led to an increase in the GDP of Greece from 1997 to 2005 (Kim et al., 2012). The FIFA 2002 World Cup resulted in an increased number of full-time jobs, increased economic profit, and improved South Korea's destination image (Kim & Morrison, 2005; Kim et al., 2012).

World Expo is a mega-event aimed at providing a platform for international discussion and collaboration, towards resolution of critical issues that society faces. Therefore, the benefits to the host city and country can be numerous and can extend to the residents. For example, air quality in Shanghai substantially improved during Expo 2010, because of stringent emission control regulations. Unfortunately, this benefit was short-lived, due to the lifting of emission control measures immediately after Expo ended (Huang et al., 2013). Moreover, the event attracts millions of visitors - the Shanghai Expo resulted in 73 million visitors and a profit of 8-10 billion USD (Kim et al., 2012). Kim and Chalip (2004) noted that mega-events could act as opportunity makers for the destinations tourism industry.

The benefits to the host city and country can be numerous and can extend to the residents.

7. World Expos - impact on destination choice in the pre-event phase - intention to visit the host destination

While the Olympics-related literature is huge, the research on previous World Expos is very limited (Getz & Page, 2016; Sharma et al., 2019), especially on pre-event research. There has been no past research on the pre-event phase and about the impact of the Expo on visiting host destinations. Despite the popularity of mega-events, very little is known about whether hosting of mega-events actually leads to a change in attitude towards the hosting country (Lee et al., 2014).

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Lee et al. (2014) investigated the intentional behaviour gap for participants of the 2012 Yeosu Expo in Korea, but only after the Expo ended. They found out that only 50% of those intending to visit the Expo actually visited the event. Stronger intentions to visit the Expo lead to a higher percentage of visitation. In addition, they found that intentions formed six months to a year before the Expo appeared to more closely resemble actual visit behaviour. Thus, mega-event managers may want to consider updating mega-event demand/attendance based on visit intentions six months to a year before the event. Furthermore, the results indicate that the longer the time distance from the origin to the Expo site, the lower the realized visit rate and the realized rate appears to be related to the cost of attending (e.g., time, transportation, etc.). The results of this study also revealed that older, better-educated respondents are more likely to follow through on their intentions. This study also suggested that host destinations can take advantage of a well-publicized mega event.

Although there are limited studies on World Expos, Sharma et al. (2019) argue that these events do have a lasting impact on the local economy. Increasing attention has been given to the image-enhancement potential of events and their media coverage, including how this might generate induced demand for the destination (Getz & Page, 2016). Co-branding events and destinations is an important topic (Chalip & Costa, 2006), which can lead to an increase in event and destination visitors.

Gomba et al. (2018) examined tourists' perceptions and attitudes towards Dubai in relation to Expo 2020. They note that since Dubai was confirmed as the host of Expo 2020 in 2013, efforts to publicize this event have been underway. However, despite a concerted marketing effort within Dubai, 30% of the respondents in this study were either ‘not at all familiar' or only ‘slightly familiar' with the upcoming Expo. Few respondents (9%) in the study reported being

They found out that only 50% of those intending to visit the Expo actually visited the event. Stronger intentions to visit the Expo lead to a higher percentage of visitation. In addition, they found that intentions formed six months to a year before the Expo appeared to more closely resemble actual visit behaviour.

'extremely' familiar with Expo 2020. Repeat visitors showed greater familiarity with Expo. Almost 40% of the sampled repeat visitors to Dubai (in comparison with 10% of first-time visitors) were either 'very familiar' or 'extremely familiar' with Expo 2020. In addition, Gomba et al. (2018) collected data regarding the potential outcomes of Expo 2020: perceived benefits, drawbacks and implications for tourists. Although many participants did not have in-depth knowledge of EXPO, their beliefs about the potential impact of this event were collected as these may inform visitors' future travel plans. Respondents noted several potential benefits to Dubai from hosting Expo 2020: increased job opportunities, economic growth and cultural diversity. Possible negative impacts include over-population and an increase in pollution. This study also assessed respondents' perceptions of the Expo's potential cost to tourists coming to Dubai. Aspects relevant to tourists included perceptions of probable increases in hotel rates, hotel tax and general tourist expenditure. In addition, findings from this study suggest that information from trusted sources is valued above that from the usual marketing channels. Word-of-mouth is undeniably important when it comes to destination decision making (Albarq, 2014; Jalilvand et al., 2013). Furthermore, Beerli and Martin (2004) stated that those who have not visited a particular destination may have little understanding of that destination. Of note, stereotypical perceptions of Dubai persist (Gangal, 2009). Safety is one of the strongest factors that influence tourists' perceptions and their decisions on whether to attend a mega event or not (Neirotti & Hilliard, 2006). Nevertheless, Dubai is considered to be one of the safest cities in the Gulf corporation council (Mehta et al., 2014), as well as in the world (Cherian, 2019).

Sharma et al. (2019) examined the effects of Expo 2020 on Dubai's destination brand before the official event. Besides, they assessed the importance of the upcoming Expo and its impact on the overall Dubai market. The results of this research confirm that Expo 2020 will have a definite impact on Dubai's destination brand, develop the city's image and enhance different sectors of the economy. They add that it is apparent that there are connections between the brand of the city and events. The Expo strives to represent an image of Dubai that is developed, advanced and welcoming.

Essentially, to determine whether an event is likely to have a positive or negative effect on a destination image, three sources of information are required: the destination's image, the event's image, and the image that the destination wants to project. To achieve a positive change in destination image that in turn causes visitation to increase, the image change must be positive and occur along the destination image dimensions (e.g., developed environment, natural environment, value, sightseeing opportunities, safety, novelty, climate, convenience, and family environment) that are important to travellers from a particular market. Event messages become important only after the images of the event transfer to the image of a destination. Destinations need to actively leverage the benefits that they wish to accumulate from an event (Chalip, 2001; Chalip & Green, 2001; Chalip & Leyns, 2002). Event organizers cannot assume that hosting an event will automatically bring benefits; conversely these benefits have to be actively strategized and managed (Gibson et al., 2008, p.445).

The debate over the benefits of hosting mega-events continues to evolve with many beginning to doubt the long-term economic and tourism benefits touted by the politicians and organizing committees. What we do know is that destination image is linked to intent to travel and so, with the strategic leveraging of images that are shown to the world in conjunction with the event (pre, during and after), the level of awareness of a particular city and/or country can be raised, which may, in turn, provide the impetus to visit at some point in the future, or at the very least be used to educate the world about a particular location (Gibson et al., 2008, p.446).

STAGE 1
SECTION B

The current perception of Dubai as a sustainable tourism destination

The impact of sustainable practices on destination choices

The impact of Expo on destination choices

CHAPTER 4 - EMPIRICAL RESEARCH

CSRE
THE CENTRE FOR SUSTAINABILITY THROUGH RESEARCH & EDUCATION

CHAPTER 4 - EMPIRICAL RESEARCH
1. METHODOLOGY

To assess the current perception of Dubai as a sustainable tourism destination, as well as the impact of World Expo and sustainable practices on destination choices, a global online survey was carried out from January to April 2020.

The questionnaire was designed and divided into four sections. In the first part, the respondents were asked to evaluate their perception of Dubai as a sustainable tourism destination across 19 statements, that are mostly directed towards sustainable practices and perceptions in tourism destinations, on a five-point Likert scale ranging from 1 (completely disagree) to 5 (completely agree). The second part of the questionnaire was designed around the World Expos in general and respondents' interest in visiting the Dubai World Expo. In the third part, the respondents were asked to evaluate the importance of the components of a destination offer when choosing a travel destination on the Likert scale ranging from 1 (not important at all) to 5(extremely important). In addition, they were asked to conduct a self-evaluation on whether they consider themselves responsible, sustainability-minded tourists. The last section was dedicated to the basic demographic and background information of the respondents.

The findings in this survey are based on claimed behavior and responses of 1,760 respondents in 110 countries throughout Asia-Pacific, the Middle East, Europe, North America, Latin America, and Africa. The data was processed with the statistical IBM SPSS 20 software package. The following analyses were carried out: descriptive statistics, the independent samples t-test, and ANOVA. Throughout the report, demographic groups are used to help analyze the data.

To explore if there are any statistically significant differences in the perception of Dubai as a sustainable tourist destination, the independent sample t-test was conducted among two segments of the respondents: those who visited Dubai and those who didn't, while the ANOVA test was performed to check the differences among the segments of the respondents in terms of their age, education, current employment status, and monthly household income. These tests are conducted at the 95% confidence level.

To examine if there are statistically significant differences in the importance of the sustainable components of the destination offer when choosing travel destinations, the independent sample t-test was conducted amongst respondents who claim that they are responsible tourists and those who do not consider themselves responsible tourists.

To further confirm the validity of the visitor survey, Dubai hotel employees were asked to evaluate the awareness and interest of their guests in Expo 2020, visiting the UAE during the event and their guests' pro-sustainability behaviour and interest. Predominantly managerial employees (67%) from various hotels and hotel departments participated in the survey.

2. SOCIO-DEMOGRAPHIC CHARACTERISTICS OF THE RESPONDENTS

In the sample of 1,760 respondents, 58% were male respondents, and 42% were female respondents. Most of them (40.5%) were 30-40 years olds, followed by the 18-29-year-olds, highly educated (bachelor and postgraduate degree holders), and full-time employed (67%). The average monthly household income in most cases was from US$1001-3000 (34.6%), followed by 29.3% of the respondents with less than US$1000 monthly household income, and 26.1% of the respondents with US$3001-5000 monthly household income. The majority of the respondents were either married (54.4%) or single (41%).

Gender	%	Monthly household income	%
Male	57.5	< 1000 US dollar	29.3
Female	42.2	1001-3000 US dollar	34.6
Prefer not to say	0.3	3001-5000 US dollar	26.1
		> 5000 US dollar	10.0
Age	**%**	**Employment status**	**%**
under 18	1.1	Student	14.8
18-24	23.7	Part-time employed	12
25-29	19.5	Full-time employed	67.2
30-40	40.5	Unemployed	5.0
41-55	12.7	Retired	0.9
56-75	2.5		
76 and above	0.1		
Highest level of education	**%**	**Marital status**	**%**
Less than high school	1.7	Single	41.0
High school	12.4	Married	54.4
College/Bachelor degree	40.9	Divorced	2.4
Postgraduate	45.0	Widowed	0.5
		In a relationship but not married	1.8

Table 1. Socio-demographic characteristics of the respondents (in %)

3. THE CURRENT PERCEPTION OF DUBAI AS A SUSTAINABLE TOURISM DESTINATION

Almost 2/3 of the respondents have visited Dubai before (Chart 1.), and most of them in the past 2 (65%), or 2-5 years (Table 1.)

Q: When was the last time you visited Dubai?	%
In the past 2 years	65.4
2-5 years ago	23.7
6-10 years ago	8.5
Over 10 years ago	2.4

Table 2. Information about visiting Dubai

Chart 1

The vast majority of the respondents (approximately 80%) agreed with the 18 sustainability-related statements, indicating that the respondents mostly perceive Dubai as a sustainable tourism destination.

Their perception of Dubai as a tourist destination was measured using 19 statements, mostly focused on the characteristics of sustainable tourism destinations (see Figure 1). The respondents were asked to evaluate their agreement with each of the statements on the Likert scale ranging from 1 (completely disagree) to 5 (completely agree). Figure 1 represents the respondents' perception of Dubai as a tourist destination across 19 statements.

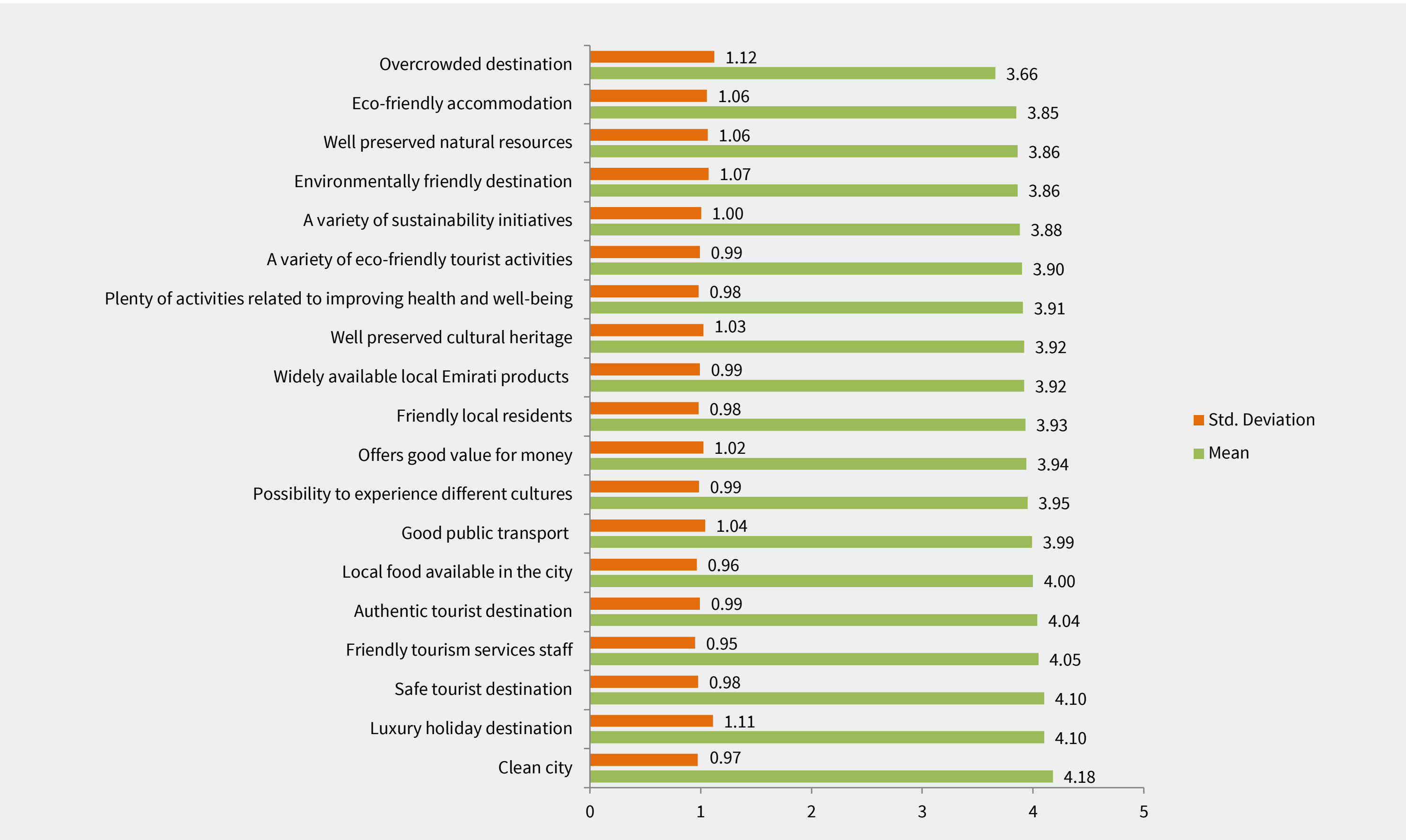

Figure 1. The respondents' perception of Dubai as a tourist destination - global results

3.1 Perception of Dubai as a sustainable tourism destination - hotel employees observations

To further confirm the validity of the visitor survey, Dubai hotel employees were asked to evaluate their guests' perception of Dubai as a tourist destination (Figure 1.)

Guests have quite a positive opinion about public transport, the offer of authentic experiences and friendly residents.

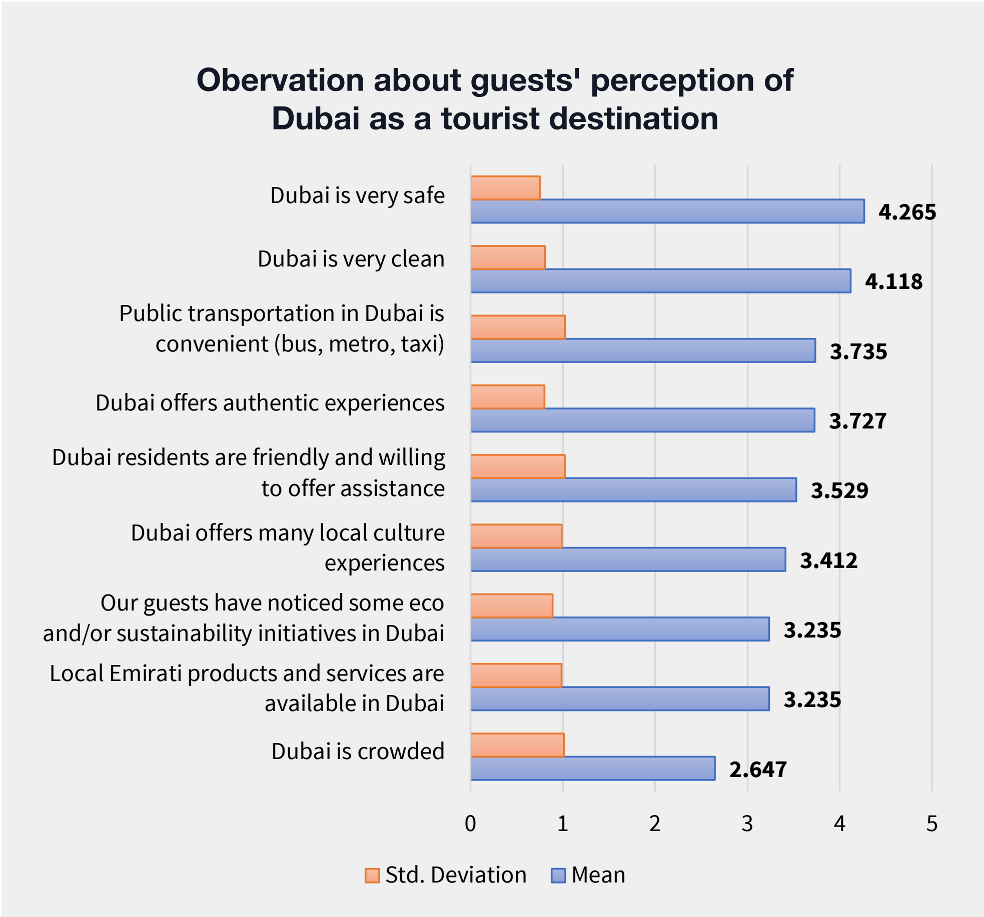

Figure 3. Observations about guests' perception of Dubai as a tourist destination

The promotion of sustainability actions and local products is needed to create greater awareness for tourists that Dubai is a sustainable tourist destination.

It is evident from the above figure that guests consider Dubai a safe and very clean destination, as these two statements show the highest mean values (above 4). Hotel employees also consider that guests have quite a positive opinion about public transport, the offer of authentic experiences and friendly residents. One negative aspect that the study highlighted, was that nearly 50% of guests had concerns about Dubai being overcrowded. Hotel employees also observed that 50% of guests do not notice eco and sustainability initiatives in Dubai and that they think that local Emirates products and services are not always available. This indicates that the promotion of sustainability actions and local products is needed to create greater awareness for tourists that Dubai is a sustainable tourist destination. Based on the above, we can conclude that visitors and hotel employees views are aligned and that hotel guests view Dubai as a sustainable tourism destination.

THE RESULTS SHOW THAT THE RESPONDENTS CONSIDER DUBAI AS:

1. Clean destination
2. Luxurious destination
3. Safe destination
4. Destination with friendly tourism services staff
5. Authentic destination

These six statements showed the highest mean values on the 19-statements scale (4 and above), which indicates a high level of the respondents' agreement. Sustainability-related statements are also evaluated with high grades (above 3.85). These findings are in line with previous literature on sustainable tourism destinations and Dubai's image as a tourist destination (Coombe & Melki, 2012; Gomba et al., 2018; Zaidan & Kovacs, 2017).

The respondents have a positive perception of public transport in Dubai. About 2/3 of them agree that Dubai is a destination that offers the possibility to experience different cultures. Also, Dubai is perceived as a destination that offers good value for money, with friendly residents, and well preserved cultural heritage and natural resources. It is interesting to note that the majority of respondents consider Dubai as an environmentally sustainable destination, with a variety of eco-friendly tourist activities, sustainability initiatives, and available eco-friendly accommodation. However, one specific aspect of note is that 62% of respondents perceive Dubai as an overcrowded destination. This finding does not come as a surprise as Dubai is ranked amongst the world's top most popular cities with 13.5 million international visitors in 2019.

It is interesting to add that there are statistically significant differences in the perception of Dubai as a tourist destination amongst those who have visited Dubai before and those who have not. The respondents who have visited Dubai rated its sustainability-related characteristics considerably higher, compared to those who have not visited the city. This means that Dubai visitors perceive the city in a more positive and sustainability-focused light than those who didn't visit it, confirming that the tourists' experiences and their word of mouth have a significant impact on the image of Dubai and first-time visitors' perception (Gomba et al., 2018).

Moreover, the results show that there are statistically significant differences in the perception of Dubai as a tourist destination amongst respondents of different age groups, educational level, current employment status, and monthly household income.

Gen Y respondents (the Millenials) perceived Dubai most positively, followed by Gen X respondents (41-55 years old), while the youngest - Gen Z respondents (under 25) had the least positive perception of Dubai. The highly educated respondents (Bachelor or postgraduate degree) as well as a full time employed respondents have more positive opinions towards Dubai compared to other groups of respondents by the level of education and current employment status. As expected, the respondents with higher monthly household income showed more positive attitudes towards Dubai. These findings are in line with a general profile of responsible tourists in literature and with our study of Dubai visitors' profile.

Figure 2. and Table 3. summarize the perception of Dubai as a tourist destination across respondents from the top tourism market sources for Dubai - India, Pakistan, UK, Russia, China, Saudi Arabia, and the USA.

Notably, the respondents from India and Pakistan have the highest positive perception of Dubai as a sustainable tourism destination.

The respondents from India and Pakistan evaluated all sustainability-related statements highly (with mean values greater than 4, except "the overcrowded destination") (see Table 3). Based on the results, respondents from India and Pakistan have the most positive opinion about sustainability initiatives in Dubai and see it as a clean, safe, authentic, and luxury holiday destination with good public transport and friendly tourism service staff.

The respondents from the Kingdom of Saudi Arabia thought very highly of Dubai as a safe tourist destination, while those from China, USA, Russia and the UK primarily perceive Dubai as a luxury holiday destination.

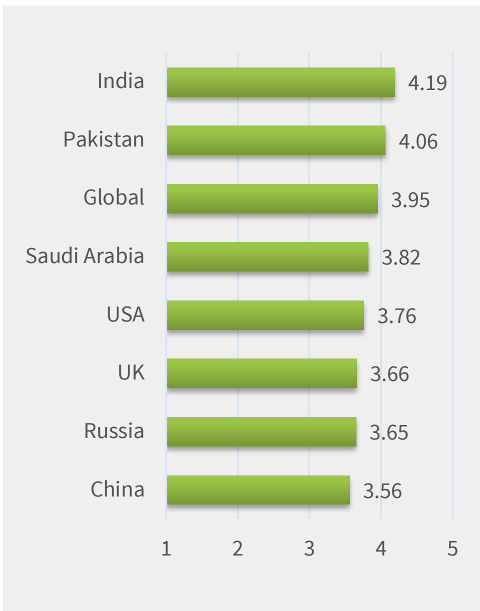

Figure 2. Perception of Dubai as a tourist destination across top source markets - mean value for the whole perception scale

Chinese respondents had the most critical views of Dubai's image (3.56). Similar views were shared by the Russian (3.65), British (3.66) and US respondents, indicating that additional marketing effort is required in these markets. These respondents gave average ratings (~3.5) to the key sustainability-related statements: that Dubai is an environmentally-friendly destination, with eco-friendly accommodation, a variety of sustainability initiatives, eco-friendly tourist activities, and activities related to improving health and well-being. Moreover, the results indicate that respondents from these countries were not so aware of the natural resources and cultural heritage of Dubai nor were they entirely convinced that Dubai offers good value for money.

Chinese respondents had the most critical views of Dubai's image (3.56). Similar views were shared by the Russian (3.65), British (3.66) and US respondents, indicating that additional marketing effort is required in these markets.

However, the literature on responsible tourism as well as our study emphasizes the importance of all the above-mentioned factors for the tourists when choosing a specific travel destination. Therefore, these findings indicate that organizations that are marketing Dubai should focus more on promoting sustainable aspects of its offer and sustainable initiatives and activities of different tourism-related stakeholders in the city. Such efforts would contribute to building an image of a sustainable tourism destination, with the final aim of primarily attracting responsible tourists from markets such as China, Russia, UK and the USA.

Items	India	Pakistan	UK	USA	Russia	China	Saudi Arabia
Luxury holiday destination	4.24	4.22	3.98	4.16	4.00	4.21	4.05
Good public transport	4.28	4.23	3.73	3.60	3.71	3.71	4.32
Environmentally friendly destination	4.15	4.15	3.36	3.79	3.41	3.29	3.74
Eco-friendly accommodation	4.15	4.05	3.49	3.64	3.65	3.14	3.44
Safe tourist destination	4.29	4.37	3.74	3.89	3.82	3.93	4.47
Local food available in the city	4.18	4.13	3.85	4.09	3.88	3.79	3.84
Widely available local Emirati products	4.14	4.06	3.74	3.98	3.94	3.79	3.79
Offers good value for money	4.22	3.95	3.52	3.57	3.38	3.36	3.53
Friendly local residents	4.17	3.91	3.74	3.65	3.50	3.64	3.84
Friendly tourism services staff	4.24	4.15	3.82	3.86	3.63	3.64	4.37
Overcrowded destination	3.86	3.28	3.16	3.39	3.56	3.21	3.11
Possibility to experience different cultures	4.13	4.05	3.88	3.84	3.67	3.57	3.79
A variety of eco-friendly tourist activities	4.17	4.13	3.50	3.64	3.76	3.50	3.74
A variety of sustainability initiatives	4.18	3.97	3.44	3.60	3.59	3.50	3.53
Plenty of activities related to improving health and well-being	4.17	4.06	3.66	3.42	3.59	3.14	3.89
Well preserved natural resources	4.19	3.77	3.50	3.63	3.53	3.43	3.58
Well preserved cultural heritage	4.18	4.00	3.76	3.84	3.47	3.43	3.68
Authentic tourist destination	4.28	4.16	3.81	3.91	3.47	3.43	3.74
Clean city	4.38	4.41	3.82	3.86	3.76	3.93	4.21

Table 3. Perception of Dubai as a tourist destination across top source markets - mean values

4. IMPACT OF SUSTAINABLE PRACTICES ON DESTINATION CHOICES

Initially, the respondents self-evaluated their travel behaviour as always sustainable, sometimes sustainable, not sustainable, or not knowing what sustainability means. This self-declaring question revealed that 70% of respondents considered themselves responsible, sustainability-minded tourists, whilst approximately 20% stated that they saw themselves as responsible tourists from time to time (Figure 3). Only a rather small segment of less than 10% of the respondents, either did not consider themselves responsible tourists or did not know what it meant.

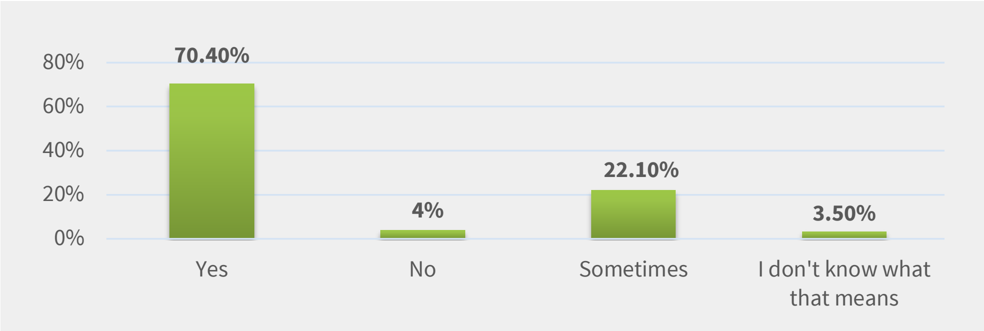

Figure 3. Respondents' self-evaluation of how responsible and sustainability-minded tourists they are

To examine the impact of specific components of destination offer on a decision to visit a certain destination, the respondents were asked to evaluate the importance of each destination component on the Likert scale ranging from 1 (not important at all) to 5 (extremely important). The findings are presented in Figure 4.

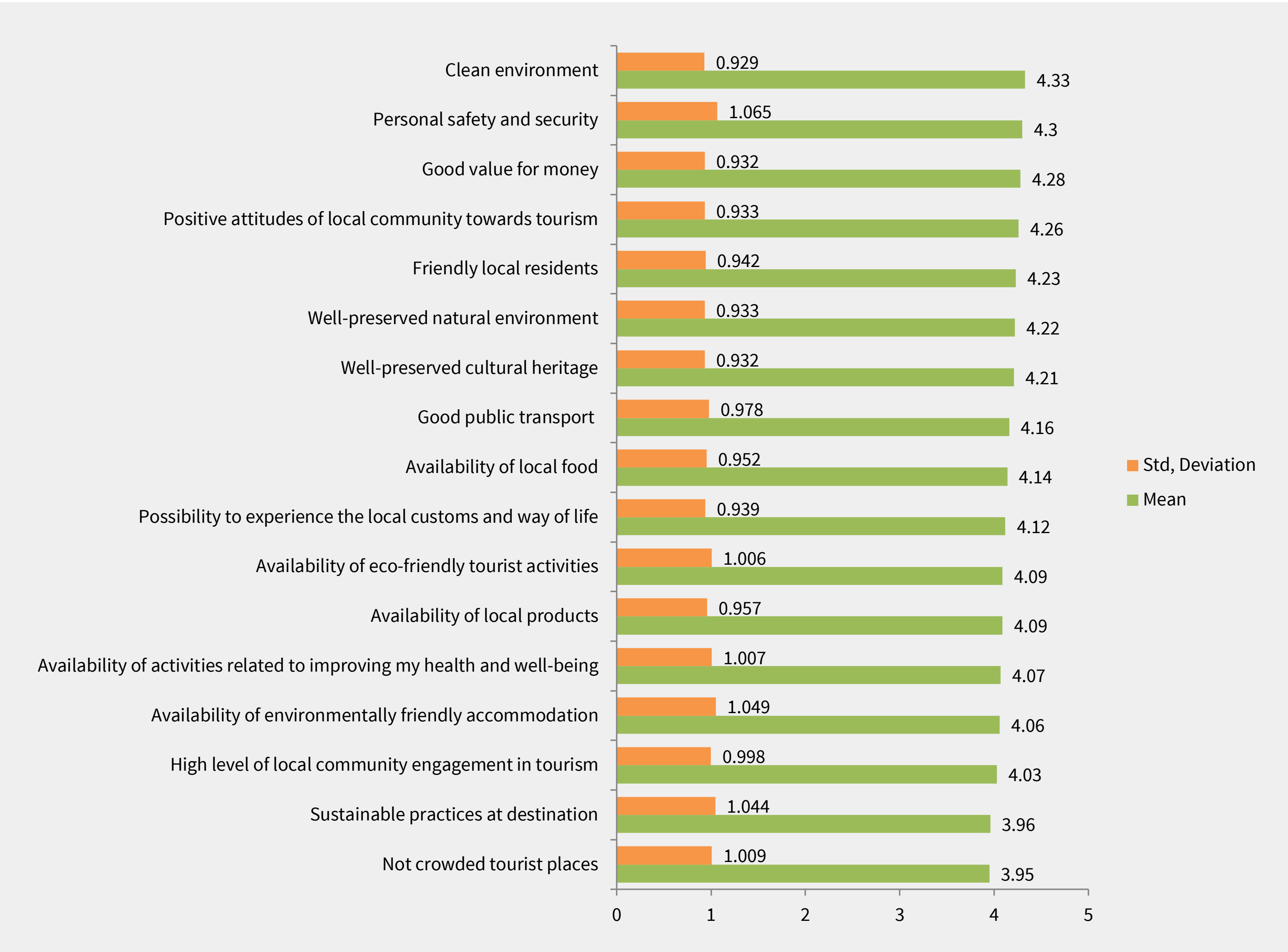

Figure 4. The importance of the sustainable components of destination offer when choosing a travel destination

On average, respondents found all of the sustainable components of destination offer to be important when choosing a travel destination.

They value the most: clean environment, personal safety and security, and good value for money. Positive attitudes of the local community towards tourism and friendly residents, as well as preserved cultural and natural heritage, good public transport, availability of local food, local products and a possibility to experience the local customs and way of life are also very important factors in the travel destination decision-making process, meaning that they should be in the focus of marketing campaigns targeting potentially responsible tourists. Moreover, respondents consider the availability of eco-friendly tourist activities and accommodation to be important factors that influence their decision on whether to visit a certain destination or not.

It is interesting to add that there are statistically significant differences between the importance of the sustainable components of destination offer when choosing travel destinations amongst respondents who claim that they are responsible tourists and those who don't consider themselves responsible tourists. As expected, the self-declared responsible tourists found all of the examined destination factors to be more important when choosing travel destinations compared to those respondents who do not consider themselves responsible tourists.

The literature gives numerous important factors affecting the travel destination decision-making process, such as destination cleanliness, public safety, quality and the availability of a public transport system, preservation of natural resources and cultural heritage, good value for money, the availability of local products and services, community participation in tourism, positive attitudes of residents towards tourism, sustainability operations, etc. (UNTWO, 2004; Pulido-Fernández & López-Sánchez, 2014; Perez et al., 2017). In our study, all these factors are found to be important for respondents, focusing specifically on Dubai as a tourist destination. Therefore, we can conclude that our findings are in line with the existing literature in the field, which emphasizes the increase in global green consumerism to the point of becoming a mainstream rather than a niche trend. The findings suggest that nowadays sustainable practices have an impact on tourists' decision to visit a certain destination, and therefore, they should be a part of the destination tourism strategy and branding.

Our findings highlight the increase in global green-consumerism to the point of it becoming a mainstream rather than a niche trend. The findings also suggest that sustainable practices have a considerable impact on contemporary tourists' decision to visit a certain destination and should, therefore, be a substantial part of Dubai's tourism strategy and branding.

5. IMPACT OF THE WORLD EXPO ON DESTINATION CHOICES

The World Expo is one of the largest international events, attracting millions of people from different regions of the world. Although there are limited studies on World Expos, the literature emphasizes that these events do have a lasting impact on the local economy and specifically the tourism industry (Sharma et al., 2019). Despite the popularity of mega-events such as the World Expo, very little is known about whether hosting this event leads to an increase in international visitor arrivals to the host country (Lee et al., 2014).

Our study investigated several objectives including the impact of The World Expo on destination choices with a special focus on Expo 2020 in Dubai, UAE.

Our study investigated several objectives including the impact of The World Expo on destination choices with a special focus on Expo 2020 in Dubai, UAE.

5.1 Awareness of The World Expo and Expo 2020

The study found that 79% of respondents know of the World Expo, indicating a high level of awareness of this mega-event (Figure 1.). Around 64% of them visited some of the previous world exhibitions (Figure 3.), while 67% confirmed that they are familiar with the fact that Dubai (UAE) is the host of the World Expo 2020. The respondents who visited Dubai before were more familiar with this fact than the ones who have not. This finding is in line with the previous study of Gomba et al. (2018) who examined tourists' perceptions and attitudes towards Dubai concerning Expo 2020.

The majority of respondents, who do not know that the next World Expo will be held in Dubai, come from India and the UK, indicating that Dubai World Expo needs to intensify its promotional efforts in these markets.

The respondents who have visited the city, showed greater familiarity with the upcoming Expo in Dubai, than 66% of the non-visitor respondents are not familiar with this information.

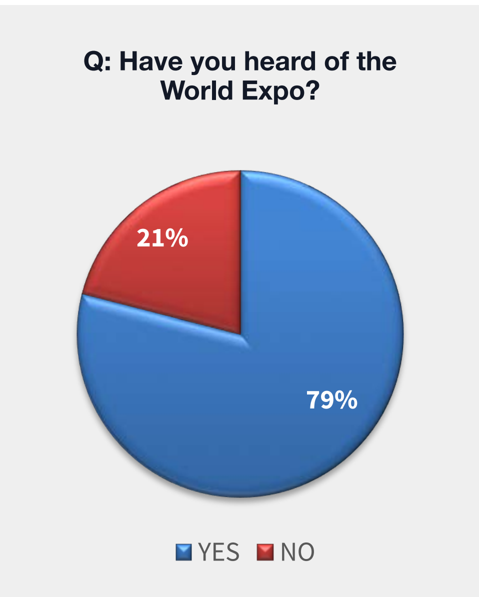

Figure 1. Awareness of the World Expo

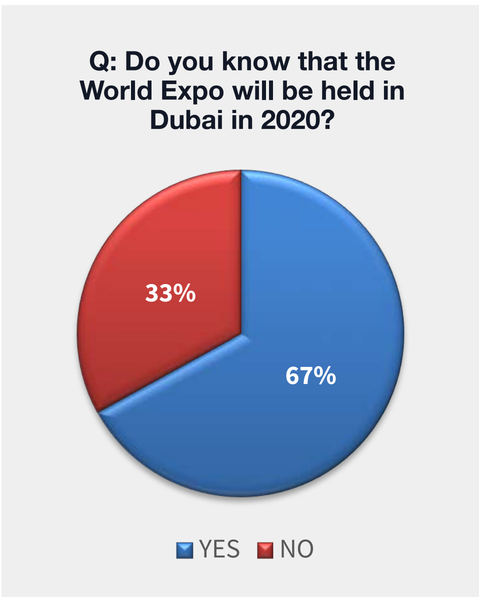

Figure 2. Awareness of the Expo 2020 Dubai, UAE

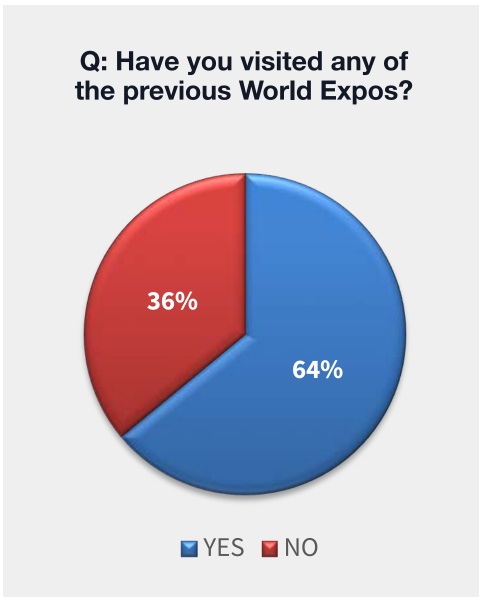

Figure 3. Visits to the previous World Expos

5.2 Intention to visit Expo 2020

Approximately 37% of respondents intend to visit Dubai during Expo 2020, while 35% are undecided and mostly come from India, Pakistan, and the UK. This leads to the conclusion that additional promotional efforts are required in order to attract visitors from the mentioned markets.

Moreover, the results showed a strong intention to visit Dubai during the Expo amongst the respondents who have already visited the city, with half of them (49%) stating they will visit the city and 36% still undecided. The majority of respondents (60%) who never visited Dubai, show no intention to visit the city during the exhibition, while 32% of them are undecided (Figure 4.)

Approximately 37% of respondents intend to visit Dubai during Expo 2020, while 35% are undecided and mostly come from India, Pakistan, and the UK.

Figure 4. Intention to visit Expo 2020

Additionally, respondents were asked to express their interest in different aspects of the Expo 2020 (Table 5). The majority of respondents have a great interest in seeing world-class architecture, exhibitions, pavilions and to experience cultures and performances of other nations, whilst learning more about waste management, renewable energies and reducing water consumption.

Furthermore, almost half (47%) of respondents who consider themselves responsible, sustainability-minded tourists plan to visit Dubai during the World Expo, whilst 33% of responsible tourists state that they will maybe visit Dubai.

Interest to	I haven't heard of the World Expo	Not at all interested	Not very interested	Neutral	Interested	Very interested
See exhibitions and pavilions	1.6	5.1	4.4	11.5	25.6	51.8
Experience the cultures and performances of other nations	2.7	2.9	2.0	10.0	34.6	47.9
See world-class architecture	2.3	2.3	1.2	8.6	30.5	55.1
Learn more about waste management	2.8	2.4	4.1	11.8	32.0	46.9
Learn more about renewable energies	2.1	2.4	2.5	9.3	32.1	51.6
Learn more about reducing water consumption	2.5	2.4	2.4	11.0	32.0	49.6

Table 5. The interest of the respondents in different aspects of Expo 2020

Based on the findings from this study, we can conclude that those respondents who have already visited Dubai and those who declare themselves as responsible tourists show more interest in visiting Dubai during the upcoming Expo. Undoubtedly, marketing efforts of Expo 2020 and its stakeholders should focus on targeting these segments and further promotion of sustainable tourism offer of Dubai (e.g. eco-friendly accommodation, eco-tourism activities, sustainability-related initiatives, etc.). Moreover, results indicate that these promotional efforts are needed, especially for a few select key Dubai source visitors markets - India, the UK and the USA.

Based on the findings from this study, we can conclude that those respondents who have already visited Dubai and those who declare themselves as responsible tourists show more interest in visiting Dubai during the upcoming Expo.

5.3 Guests' interest in Dubai Expo - hotel employees observations

To further confirm the validity of the above findings from the visitor survey, hotel employees were asked to evaluate the awareness and interest of their guests in Expo2020 and the likelihood of them visiting Dubai during the event. A large majority of hotel employees (88%) confirmed that guests are well informed about Expo 2020 whilst 77% agreed that their guests often enquire about Expo. Finally, 66% believe that their guests will return and visit the UAE and attend the event. It is evident (Figure 4) that guests are very well informed about Expo 2020, that they express interest in the event and that many are planning to visit during this period.

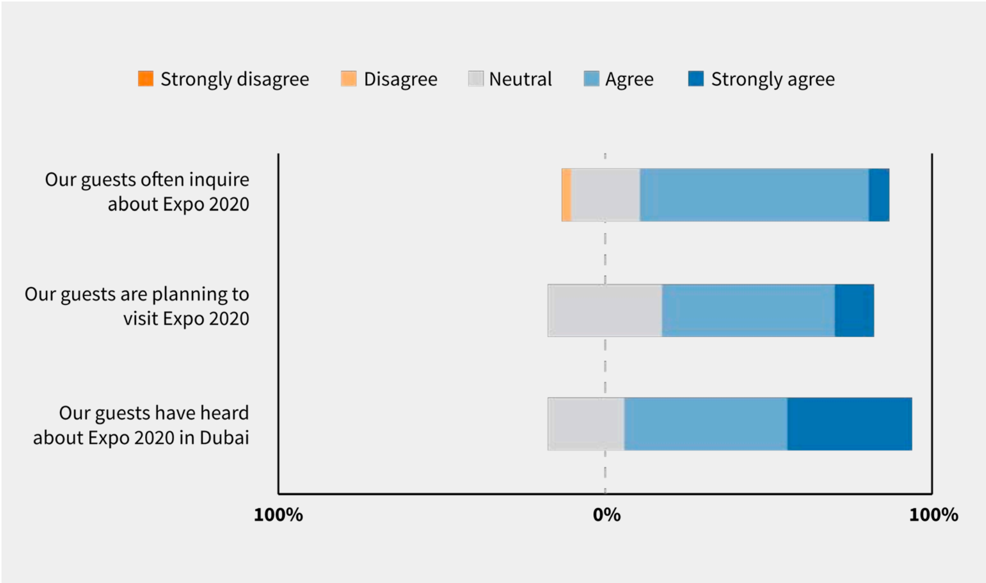

Figure 5. Guests' interest in Expo 2020 Dubai

5.4 Information and expectations about Dubai Expo 2020 - hotel employees observations

Research also shows that hotels expect higher occupancy rates during Expo 2020 and that hotel employees are well prepared and informed about EXPO. Furthermore , over 67% of hotel employees believe that EXPO 2020 will improve the image of UAE and Dubai as a sustainable destination (Figure 5).

67% of hotel employees believe that EXPO 2020 will improve the image of UAE and Dubai as a sustainable destination

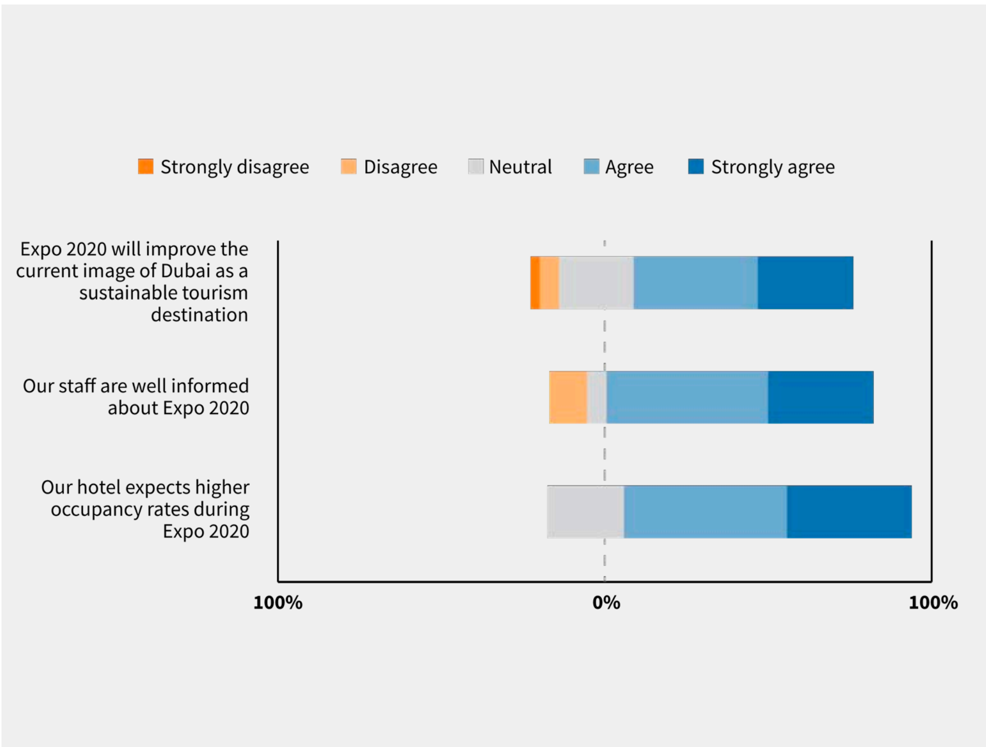

Figure 6. Hotels’ expectations and impact of Expo 2020 on the image of Dubai

In conclusion, this study has shown that Dubai responsible tourists show behavior similar to sustainable, responsible and ethical tourists, defined by previous studies in the field. The research has provided a deeper understanding of how tourists behaved before, during and after their trip, how they chose their destination, what was important enough for them to pay extra, their travel-related online behaviour and finally, their pro-sustainability travel choices. In addition, this study has shown that tourists have a very positive perception of Dubai as a sustainable tourism destination and that they would gladly visit during Expo 2020.

This study presents an important base for the creation of a strategy that will target responsible tourists, create effective messages, allow the selection of viable media channels and shape the tourism offer, based on the needs and preferences of this target segment.

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The UAE as a Sustainable Tourism Destination

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