

Applied Research Project (MINT-Sustainable Trade and Finance)

“Exploring the connection between major international events and nation branding efforts in the Middle East: A case study analysis.”

For Teneo, Middle East-Dubai Office

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## **Executive Summary**

The Middle East is becoming increasingly important politically, economically, and culturally. The Gulf countries, in particular, are emerging as powerful actors on the global stage. For almost two decades, Gulf nations have used the hosting of major international events (“mega-events”) to improve their national images and support their economic and political strategies (“nation branding”). Recently, the ambitions of these events have risen, as demonstrated by the COP 27 in Egypt, Expo 2020, Dubai and the Fifa World Cup Qatar 2022. However, the degree to which these mega-events contribute to nation branding is yet to be determined for the Middle East. Similarly, little is known about the communication strategies that can enhance the effectiveness of these mega-events for nation branding in the region.

### Research questions

This report focuses on one region of the Middle East, the Arabian Gulf, and examines the connection between mega-events and nation branding through three research questions:

- What are the impacts of mega-events on the nation branding efforts of host nations in the Gulf?
- How successful have Gulf nations been in using the hosting of mega-events to shape positive perceptions of their countries?
- What communication strategies can Gulf nations use to enhance the efficacy of the hosting of mega-events for nation branding?

### Methods

After presenting the main concepts and relevant academic literature, we use a mixed methods research design (Primary/Secondary Sources; Survey; Interviews) to conduct two case studies of mega-events in the Gulf (Expo 2020 Dubai and the Fifa World Cup Qatar 2022), which provides us with answers to the two first research questions. The combined insights from the literature review and the case studies are synthesized in a Guidebook, which answers the third question. The Guidebook proposes actionable recommendations applicable to Gulf nations on communication strategies to enhance the effectiveness of mega-events for nation branding purposes.

## Findings

In response to our research questions, we find the following:

- Overall, we find that both events had positive impacts on the brands of Dubai and Qatar. These impacts are observable directly and indirectly. They are directly observable through the improved perceptions of the nation brand by individuals around the world (nation brand indexes). They are indirectly observable through event-related economic outcomes. However, the magnitude of these effects is difficult to quantify.
- Mega-events help Gulf nations shape positive perceptions of their countries, albeit in a limited fashion. The impacts of a mega-event on a nation's image are highly dependent on the initial strength of the brand and on the overall communication strategy of the nation. Host nations should carefully prepare the ground, from a branding/communication's point of view, before using mega-events for nation branding purposes. Communication and nation branding are long-term endeavors, and a mega-event can only be used to enhance existing strategies.
- The Guidebook can be found on page. Here are some of the most important recommendations:
  - Gulf nations are still mostly misunderstood, unknown, and stereotyped.
  - Their nation branding and communication efforts should be strategic, long-term oriented, and consistent.
  - Their nations brands should be simple and differentiating.
  - Communication should be constant and unfold on many fronts. Gulf nations should attempt to control the narratives framing their countries and capture the media momentum.
  - Gulf nations should groom more personalities, brand ambassadors, and "celebrities" to become spokespeople of their brands.
  - Gulf nations should leverage their cultures as ways of appearing more approachable and relatable.
  - Mega-events should be integrated in broader economic, political, and cultural strategies.
  - Mega-events can only enhance, or slightly modify, an existing nation brand. Potential host nations should therefore carefully assess the costs and expected benefits.

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## Introduction

The Middle East is becoming increasingly important politically, economically, and culturally. The Gulf countries, in particular, are emerging as powerful actors on the global stage<sup>1</sup>. Alongside other strategies of influence, Gulf nations are using nation branding to achieve their economic and (geo)political ambitions. One important component of these nation branding efforts is the hosting of mega-events to communicate their values and achievements to global audiences. Despite the increasing size, ambitions, and costs of these mega-events, their nation branding effects on Gulf nations have been little studied<sup>2</sup>.

To further our understanding of these effects and of the ways in which they can be enhanced, this report examines the connection between mega-events and nation branding in the Gulf through three research questions:

- What are the impacts of mega-events on the nation branding efforts of host nations in the Gulf?
- How successful have Gulf nations been in using the hosting of mega-events to shape positive perceptions of their countries?
- What communication strategies can Gulf nations use to enhance the efficacy of the hosting of mega-events for nation branding?

The report is split into three parts. First, we introduce the relevant concepts and present a review of the concerned literature. Second, we present two case studies of mega-events in the Gulf: Expo 2020 Dubai and Fifa World Cup Qatar 2022<sup>3</sup>. Third, the insights derived from this analysis are synthesized in a guidebook. It proposes actionable recommendations applicable to Gulf nations on communication strategies to enhance the effectiveness of mega-events for nation branding purposes<sup>4</sup>.

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<sup>1</sup> Due to the importance and influence of Gulf nations in the Middle East and beyond, as well as their extensive use of nation branding, these countries will be the focus of this report. Further studies may explore the specificities of other Middle Eastern nations, such as Egypt.

<sup>2</sup> See Annex 2 (p.45) for a detailed economic, political, and social background of Gulf nations, as well as an analysis of their use of nation branding as a strategic instrument.

<sup>3</sup> We also gathered data through semi-structured interviews and the conduction of a survey at the Graduate Institute of Geneva. For more information about the methodology, see Annex p.41.

<sup>4</sup> Additionally, background material can be found in the Annex.

## Literature review

This literature review introduces the concepts that will be used throughout this report and presents relevant evidence from the fields of nation branding, mega-events planning, and public relations.

### Nation branding

#### Nation brands

A *nation brand*<sup>5</sup> is “the unique, multi-dimensional blend of elements that provide the nation with culturally grounded differentiation and relevance for all its target audiences” (Dinnie 2008, 15). According to nation branding pioneer and theorist Simon Anholt, six factors/perceptions form the nation brand (Ipsos 2021)<sup>6</sup>:

- 1) Exports: the reputation of the nation’s products abroad (“country-of-origin effect”).
- 2) Tourism: Visitors and tourists’ interest in the nation.
- 3) Culture and heritage: The value and attractiveness of a nation’s heritage.
- 4) Governance: Respect for a nation’s competency, fairness, and “goodness”.
- 5) People: Qualities typically conferred to citizens of a nation, in line with stereotypes.
- 6) Investments and immigration: Ability to attract people and funds.

Importantly, these perceptions and images are durable mental representations, and hence slow to change (Dinnie 2018).

#### Nation brand equity

The *nation brand equity* is the value formed by the aggregation of these factors. Two methodologies are used to measure it:

- The consumer/visitor’s perspective determines which qualities/ attributes are conferred to a nation brand, ranging from brand awareness to brand personality (Dinnie 2018).

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<sup>5</sup> A *brand* is “a unique combination of characteristics and added values, both functional and non-functional, which have taken on a relevant meaning that is inextricably linked to the brand, awareness of which might be conscious or intuitive” (Macrae, Parkinson and Sheerman 1995). A *nation brand* is more complex than a corporate brand, as it seeks to represent the whole nation with its internal diversity and plurality of stakeholders (Dinnie 2018).

<sup>6</sup> Similarly, for city brands, Anholt identifies six factors (Ipsos 2021): 1) Presence: Based on the status of a city and the familiarity/knowledge that people possess in relation to it. 2) Place: The perceptions that people have of the built and natural environments of the city. 3) Prerequisites: Quality of life in a city. 4) People: Similar to nation brands but applied to a city. 5) Pulse: How exciting and interesting a city is. 6) Potential: Economic and educational opportunities in a city.

Nation brand indexes such as the Anholt-Ipsos Nation Brand Index and the FutureBrand Country Brand Index, follow this perspective. Through worldwide surveys, these indexes provide estimates of nation brands' equities based on the subjective judgements of international samples (Aronczyk 2013).

- The financial perspective quantifies the economic value of a nation brand. For example, the Brand Finance Nation Brands index uses an adaptation of the norm ISO 10668 and combines legal, behavioral, and financial analyses to assess the monetary value of nation brands (Brand Finance 2015).

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### Nation branding

Nation *branding* refers to the efforts undertaken to convey a positive image of a nation and thereby raise its brand equity<sup>7</sup>.

Nations can brand themselves through four main channels (Hung 2014):

- The desirability of a nation's exports is attained through positive country-of-origin effects. This can be achieved through the introduction of quality labels or by providing more information.
- Nations can launch paid government advertising campaigns to convey positive images about their products, culture, or any other dimension they wish to highlight.
- Nations can engage in activities that are positively looked upon by the international community, such as foreign aid, diplomatic mediation, and participation in global initiatives.
- Nations can host mega-events to communicate a different image to global audiences.

### Effectiveness of nation branding

The evidence on nation branding's effectiveness in raising nation brand equity is mixed. For instance, Anholt has argued that there is no correlation between expenditure on nation branding campaigns and changes in nation brand equity. Reputation can only be improved if communication is coupled with and based on real-world actions (Anholt 2020). This is consistent with studies highlighting the counterproductive consequences of government communications inconsistent with policies (Loftsdóttir 2015).

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<sup>7</sup> Nation branding aims to render nation brands more attractive, which translates into improved perceptions of the nation, which improves the images of these nations. Most nation branding initiatives are in fact rebranding initiatives, as they seek to replace negative/insufficient perceptions with more positive/salient ones (Fan 2010).

Other authors, however, have highlighted the positive effects of nation branding efforts, such as improved foreign direct investment inflows (Lahrech et al. 2020; Matiza & Oni 2013). The difficulty of such wholesale assessments is that countries, contexts, and campaigns differ. Consequently, the effectiveness of nation branding will vary on a case-by-case basis (Hao et al. 2019).

## Mega-events planning

### Definition: Mega-events and legacies

Mega-events are “ambulatory occasions of a fixed duration that attract a large number of visitors, have a large mediated reach, come with large costs, and have large impacts on the built environment and the population.” (Müller 2015, 638). The positive/negative long-term outcomes generated by the hosting of a mega-event are called *legacies*. Three types of domestic legacies can be identified (Brittain et al. 2017):

- Economic: Long-term impacts on investment, employment, tourism, and other economic activities linkable to the mega-event.
- Social: Long-term impacts on the host community's social structures such as increased community participation, volunteerism, sports participation (in the case of a sports mega-event), and social cohesion.
- Environmental: Long-term impacts on the host community's environment such as improved infrastructure, reduced pollution, and biodiversity conservation.

In addition to these domestic legacies, the event’s impact on the host’s image<sup>8</sup> abroad is an external legacy (Grix et al. 2014). This external legacy is the foundation of a mega-event’s nation branding effects.

### Assessing the nation branding effects of a mega-event

Various methodologies are used to assess the nation branding impacts of a mega-event. Due to the complexities of the subject<sup>9</sup>, these methodologies only provide estimates based on reasonable inferences. Ideally, these methodologies should be used conjointly to yield more robust results<sup>10</sup>.

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<sup>8</sup> As outlined above, changes in perceptions of the nation’s image translate into changes in the nation brand equity.

<sup>9</sup> Such as the multiplicity of interacting factors that can influence a nation’s image, the difficulty of mapping global perceptions of a nation, the long-term influence of a mega-event that is difficult to measure, etc.

<sup>10</sup> The case studies in this report use both methodologies.



The first methodology is the direct assessment of changes in the national image, which can be done through at least two means<sup>11</sup>:

- The comparison of nation brand indexes' scores before and after the event can provide insights into its effect on the nation's image<sup>12</sup>.
- A wide-reaching quantitative media analysis can be conducted to assess the level of awareness, the emotions, reactions, and discussions generated by the event<sup>13</sup>. Comparisons with earlier media discourses can help determine whether the event improved the nation's image<sup>14</sup>.

The second methodology is the indirect assessment of changes in the national image through an analysis of the event-related economic outcomes<sup>15</sup>, which are considered appropriate proxies (Masterman 2014).

#### The concept of leverage: Improving the nation branding effects of a mega-event

Echoing the research on nation branding, the degree to which the host's image can be improved by a mega-event is debated. Some scholars argue that branding effects are transitory, generally negligible if the host already has a positive reputation, and negative if the host has a negative reputation (Donos 2012). Moreover, awareness of host cities/countries does not seem to rise in a durable fashion, with post-event surveys revealing the respondents' lack of memory of previous host destinations (Solberg 2018). For others, mega-events may provide short-term benefits, but the long-term impact is often unclear (Malfas et al. 2004).

On the other hand, some mega-events have undoubtedly contributed to positive nation branding efforts. One oft-cited event is the 2006 Germany Fifa World Cup. The event was organized with national objectives in mind and involved a very broad coalition of actors collaborating in a highly coordinated way (Peeters and van der Wall 2007). Planning was long-term oriented, holistic, and significant efforts were made to transform citizens into brand ambassadors. An international marketing campaign complemented the event itself (Grix 2012).

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<sup>11</sup> A third mean is the use of pre- and post-event surveys to measure the differences in visitors' perceptions, with the assumption that they will spread these views throughout their social networks, generating positive word-of-mouth effect. For instance, see Ernst & Young 2019, which conducted this analysis for Expo 2020 Dubai.

<sup>12</sup> A significant rise/drop in ranking can be an indication of the event's effect, provided most other national factors can be considered to have stayed equal.

<sup>13</sup> For instance, see Buarque 2015, for a media analysis of two Fifa World Cups in Brazil.

<sup>14</sup> For instance, see Dubinsky et al. 2013, for an analysis of the 2008 Beijing Olympic Games.

<sup>15</sup> E.g. touristic arrivals, inward investment flows, trade figures, etc.

The World Cup is credited with significantly improving Germany's reputation and national image, strengthening internal cohesion and national pride, and attracting foreign investment and tourists (Feddersen et al. 2014).

As a result, the concept of *leverage* has emerged to describe the strategic planning implemented by hosts to maximize the positive legacies of mega-events. This conceptual shift acknowledges that positive legacies are dependent on effective planning and management (Chalip 2014). Importantly, the concept of leverage also considers that the post-event period matters for the establishment of sustainable, long-term positive legacies (Grix 2014). One way to leverage mega-events is to consider them as instruments of *public diplomacy*.

### Mega-events as instruments of public diplomacy

Public diplomacy is “the business of conducting foreign policy by engaging the global public” (Cull 2019, 2). It aims to increase a nation's soft power, a concept created by Joseph Nye in 1990<sup>16</sup> to describe “the quality of attractiveness flowing from an actor's culture or behavior which makes it easier (or by its absence harder) to build partnerships, advance agendas, and work in the international space” (Cull 2019, 16).

Public diplomacy is based on two insights (Cull 2019):

- Relevant actors on the global stage are not confined to nation-states anymore, but encompass subnational regions, civil society, corporations, nongovernmental organizations, and individuals.
- Digital technologies have allowed more actors to gain a voice and visibility, and traditional barriers and gatekeeping have faltered.

Consequently, public diplomacy emphasizes the need for governments to “listen” and engage with different actors to promote cultural understanding, provide information, co-opt potential critics, and cultivate trust. As propaganda loses potency in an increasingly transparent world, public diplomacy privileges the uses of advocacy to communicate a nation's views to global publics (Snow 2020). The hosting of mega-events fits naturally into this framework. Mega-events welcome international visitors who are particularly sensitive and receptive to different cultures. A host nation should take this opportunity to introduce its culture, a powerful nation branding element, to international visitors. It is therefore advisable to promote national cultural offerings before the hosting of a mega-event.

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<sup>16</sup> Nye, J. 1990. *Bound to lead: The changing nature of American power*. New York: Basic Books.

## Public relations

### Overview

Public relations is “a form of strategic communication directed primarily toward gaining public understanding and acceptance and the process of creating a good relationship between an organization and the public, especially with regard to reputation and to the communication of information” (Curtin and Gaithner 2007). The short-term focus of public relations, relative to other communication fields such as marketing, makes it well-suited for mega-events.

### Public relations for mega-events

Despite its suitability for mega-events, public relations has not historically had a significant role in the hosting of mega-events. Recently, however, public relations has been used for “work with journalists [...] work with volunteers, issues and crisis management, creating brand management and developing a positive image” (Iskakova 2014, 8)<sup>17</sup>. There are currently no standard practices for the use of public relations for mega-events due to the lack of academic research and the recency of the phenomenon. Nonetheless, one insight stands out. The event’s organizing committee and its public relations arm should have clear messages, communicate them early on and be ready to react quickly to negative press. Momentum is a crucial dimension that the organization should aim to control in order to construct the narrative surrounding the event. Otherwise, this momentum might be captured by the media and commentators, with a concurrent control of the narrative<sup>18</sup>.

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<sup>17</sup> Examples of the recent use of public relations in the context of mega-events include the Beijing 2008, London 2012, and Sochi 2018 Summer Olympics, as well as the Shanghai 2010 and Dubai 2020 Expos. Public relations professionals assisted with the crafting of consistent and effective communication strategies to secure bids and garner domestic popular support. In addition, these firms managed the implementation of media campaigns, media relations, and the media training of hosting executives (Iskakova 2014).

<sup>18</sup> For instance, the public relations team for the Sochi 2018 Summer Olympics failed to prepare for the negative perceptions and media attention that the event garnered. As a result, it remained reactive where it could, and should, have been proactive (Iskakova 2014, 37).

## Conclusion: Knowledge Gaps

The literature review identified three knowledge gaps:

- Nation branding: The effectiveness of nation branding varies on a case-by-case basis. There is little systematic evidence on the factors that increase the effectiveness of nation branding efforts.
- Mega-events: More research must be done on the ways in which mega-events can be leveraged from a nation branding perspective.
- Communication studies: There is a lack of research on public relations for mega-events, which translates into an absence of standard best practices for professionals.

There is also a lack of research on how these fields apply to the Middle East and the Gulf. This report contributes to these fields with two case studies on the effectiveness of mega-events from a nation branding perspective, for Gulf countries, as well as by considering which communication strategies can enhance this effectiveness. In the following, we present the case studies of two mega-events hosted by Gulf nations: Expo 2020 Dubai and Fifa World Cup Qatar 2022.

## Case Study: Expo 2020 Dubai

We examine the nation branding impacts of Expo 2020 Dubai on the city and the UAE, and explore the extent to which communication enhanced these impacts. After a brief presentation of the Expo<sup>19</sup>, we study the branding and communication strategies of the event. We then estimate the nation branding effects of the event through direct and indirect impacts. Finally, we assess the communication strategies of the event's organizers.

### Expo 2020 Dubai: General presentation

When Dubai first considered hosting Expo 2020, in 2009, the city was in the midst of a strategic transition. Economically, the financial crisis of 2008 had deeply affected Dubai, which relied heavily on high-end tourism. As a result, Dubai diversified its touristic offerings, and endeavored to become a “knowledge-based economy” with an emphasis on innovation and sustainability (Althani 2023). Politically, the UAE was developing a soft power strategy, acting as a mediator and intervening more proactively in international forums (Antwi-Boateng & Alhashmi 2022). Dubai was the first Gulf nation to use mega-events as a nation branding tool, and its decision to host Expo 2020 was part of a broader strategy to support the emirate's brand, as well as its economic and political position<sup>20</sup>.

### Timeline

- November 2011: The candidacy of Dubai for Expo 2020 was submitted to the organizing body, the Bureau International des Expositions (BIE).
- November 2013: Dubai was selected for the 2020 Expo with the theme “Connecting Minds, Creating the Future”, and sub-themes Mobility, Opportunity and Sustainability (The National News 2013). It was to be the first Expo held in the Middle East, Africa, and South Asia. The event was scheduled to run between the 20<sup>th</sup> of October 2020 and the 10<sup>th</sup> of April 2021, coinciding with *The Year of 50/Golden Jubilee*, the fifty-year anniversary of the creation of the UAE (Global Media Insights 2022).

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<sup>19</sup> World Expos are international events in which nations build pavilions highlighting some achievements, natural features, or other aspects of their country they want to display. The first World Expo took place in London in 1851. Five phases can be determined regarding the focus of World Expos (Greenhalgh 2011) From 1851 to 1875, World Expos emphasized the imperial ambitions of European countries. From 1875 to 1915, World Expos became increasingly popular as a cultural phenomenon. Subsequently, up to 1970, World Expos concentrated on progress and technological innovations. Between 1970 and 2000, World Expos focused on “progress and harmony for mankind” (Richards 2022, 2). Since 2000, the focus of Expos has been on sustainable development (Greenhalgh 2011).

<sup>20</sup> For a detailed background of Dubai and its branding history, see Annex 3, p.47.

- October 2021-March 2022: Due to the COVID 19 pandemic, the Expo was postponed and took place between the 1<sup>st</sup> of October 2021 and the 31<sup>st</sup> of March 2022.

The event hosted 192 pavilions, welcoming 24.1 million physical visits and 251.2 million virtual visits (Ernst and Young 2023).

### Preparation and expectations

Dubai invested in infrastructure projects<sup>21</sup> and implemented new legislations and policies to leverage the Expo<sup>22</sup>. Estimates of Dubai's expenditure for Expo 2020 diverge widely because of the difficulty of defining what was invested strictly for the Expo. They range from upwards of 7 billion dollars (BBC 2021) to upwards of 40 billion dollars (Arabian Business 2018). Conversely, Ernst and Young, a consultancy, provided a pre-event assessment of the expected benefits of Expo 2020 for Dubai (Ernst and Young 2019). Overall, the event was expected to attract 25 million visitors, 55% of which would be international, and 190 national pavilions. Economically, Expo 2020 was expected to contribute 122.6 billion AED (1.5% of the UAE's annual GDP; 33,4 billion \$) and create 905'200 full-time equivalent job per years. Additionally, EY highlighted the likely benefits to Dubai's international profile and reputation (Ernst and Young 2019).

In the following, we present Expo 2020 Dubai's branding strategy and its links with the broader nation/city-branding strategy of Dubai.

## Expo 2020 Dubai: Branding Strategy

World Expos contribute to the branding of their hosts by showing “their capacity to innovate, how they promote an attractive image through their cultural and public diplomacy program, and through a display of political power, contributing to the construction and consolidation of state identities” (Tudor 2022, 132). The choice of a theme is one of the ways in which a host country constructs the *brand purpose* of an Expo.

Dubai framed its central theme and subthemes (“Connecting Minds, Creating the Future”; Mobility, Opportunity, Sustainability) in ways that highlighted its own achievements.

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<sup>21</sup> E.g. Expo City Dubai site, Expo Village buildings, new metro line, expansion of Al Maktoum Airport etc. (Nadkarni 2019).

<sup>22</sup> E.g. new visa rules, business incentives, etc. (Kaul 2019).

HH Sheikh Ahmed bin Saeed Al Maktoum<sup>23</sup> articulated this clearly in a 2014 BIE document, describing the themes and subthemes as a “natural choice” for Dubai (Sheikh Ahmed bin Saeed Al Maktoum 2014, 17), which is portrayed as a place of connections and exchanges, a city of collaborators and innovators, built atop an inclusive culture and a deep heritage.

Highlighting Dubai’s position as a hub with its ports, airports, airline company, etc., the document also emphasizes Dubai’s green ambitions<sup>24</sup>.

The *brand personality* of Expo 2020 was optimistic and future oriented, emphasizing the potential of human ingenuity and collaboration in the face of global challenges. This was embedded in the design of Expo City itself, which was built around a central plaza called *Al Wasl* (“the connection” in Arabic) (HOK).

The branding of Expo 2020 Dubai had three objectives (Expo 2020 Dubai 2021):

1. Showcase Expo 2020 Dubai as a platform to mobilize individuals, corporations, and institutions in order to solve society’s most pressing problems.
2. Portray Dubai as a “place of progressiveness, partnership and prosperity within the region and the global stage” (Expo 2020 Dubai 2021, 44).
3. Attract physical and virtual visitors to the event.

To achieve these objectives, Expo 2020 focused on five value propositions:

1. the world’s most inventive ideas
2. the world’s most inspiring architecture
3. the whole world in one place
4. the world’s greatest show
5. A unique world of collaboration and opportunity.

To follow-up on these propositions, the call to action was “The world needs all of us now. Join us at Expo 2020 to create a better future together.” (Expo 2020 Dubai 2021).

This case study is primarily concerned with the second objective, which focuses on nation/city branding. Expo 2020 aimed to portray Dubai as an empathetic, responsible, and competent actor on the international stage, in addition or contrast with the image, widely shared amongst tourists, of Dubai as a city of opulent leisure (Gomba et al. 2018).

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<sup>23</sup> Chairman of the Expo 2020 Dubai Higher Preparatory Committee.

<sup>24</sup> Which range from Masdar City (“a blend of architecture and ecology [...] one of the world’s first and most important ‘arcology’ projects” (Sheikh Ahmed bin Saeed Al Maktoum 2014, 24)) to the conservation of endangered species.

This brand repositioning has been a long-term project of Dubai and the UAE, starting in 2010 with the *UAE Vision 2021*, a government document reviewing national targets for 2021 and endeavoring to build a sustainable, knowledge-based economy (Vision 2021).

In the wake of Dubai's selection for Expo 2020, the emirate launched a series of initiatives to bolster innovation and knowledge-based sectors in Dubai<sup>25</sup>. Expo 2020 Dubai furthered this strategy by showcasing Dubai as a leader in innovation and sustainability<sup>26</sup>. The branding of Dubai for Expo 2020 linked this focus on innovation to the UAE's history and traditions. The logo of Expo 2020 was based on a ring found in the archeological site of Sarouq Al Hadeed in which lived a "civilisation that existed 4000 years ago in an area extending from Baynounah in Abu Dhabi to the mountains of Ras Al Khaimah and Fujairah [...] The Expo 2020 logo represents the UAE's message to the world that its civilization has deep roots [...] The UAE was and will continue to be a melting pot that gathers civilizations and a center for innovation" (Expo 2020 Dubai 2021, 35). This focus on culture was built into one of the key Expo 2020 structures, the Culture Plaza, which highlighted the UAE's culture, history, and heritage (Nadkarni 2019a).

This branding strategy was supported and seconded by a communication strategy, which we detail in the following section.

## Expo 2020 Dubai: Communication Strategy

The communication strategy for Expo 2020 had two objectives:

1. To attract visitors to the event.
2. To generate interest in the event and highlight Dubai's profile<sup>27</sup>.

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<sup>25</sup> For example: the year 2015 was declared "Year of Innovation" (The National News 2014), a new Industrial Strategy was unveiled in 2016 to "elevate Dubai into a global platform for knowledge-based sustainable and innovation-focused businesses" (UAE Government), the Dubai Creative Economy Strategy, the 2017 Moonshot Apprenticeship Program etc. (UAE Government).

<sup>26</sup> For example, the Expo featured an important initiative, the *Expo Live Programme*, "dedicated to funding and accelerating creative solutions so that everyone on Earth can enjoy a sustainable, prosperous future" (Virtual Expo). Similarly, the Expo was touted as being "the most sustainable world fair in history" (Abbas 2022).

<sup>27</sup> One professional having worked for Expo 2020 described it as providing "reasons to come and reasons to care".



The communication strategy identified a primary target audience and two types of markets to attract potential visitors (Expo 2020 Dubai 2021):

- Primary target audience: Individuals who were “open to and interested in learning more about the issues that affect us all, especially those around people and planet [...] cross-generational, avid readers, keen followers of news and events, and open to new ideas, cultures and experiences” (Expo 2020 Dubai 2021, 44).
- First-tier markets: UAE, Saudi Arabia and other Gulf countries, India, the United Kingdom, Russia, and China.
- Second-tier markets: France, Germany, Egypt, and Jordan (Expo 2020 Dubai 2021).

The communication planning can be split into different phases:

1. 2011-2013: Dubai promoted its bid for the event during the selection process. Dubai led concerted efforts between the UAE news agency<sup>28</sup>, public relations, marketing, and media firms to support its bid (King 2016). Dubai’s bid also received some celebrities’ endorsements (Gillett 2014).
2. 2017-2019: Expo 2020 Dubai launched various campaigns that appeared in digital, social, TV, print, cinema, and Out Of Home (OOH) formats. In 2017, the airline company Emirates emblazoned its fleet with Expo 2020 livery, promoting the event to its customers around the world (Emirates 2017). In January 2018, Expo 2020 launched its first international campaign (“Hands”). Produced by Havas, an advertising agency, it used the symbol of hands to showcase common achievements of humanity (Havas 2018). This was followed by two other campaigns produced by Memac Ogilvy (“Welcome The Future” (LBB 2019); “Be There For The Greatest Show”), showcasing human ingenuity and progress, with a call to action to go visit the Expo.



Source: <https://havasuk.medium.com/hand-in-hand-expo-2020-dubai-launches-first-global-marketing-campaign-since-bid-win-65f16e40cce2>

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<sup>28</sup> Emirates News Agency.

3. 2020-October 2021: Three campaigns bearing the slogan “Join the Making of a New World” were launched, targeting potential visitors<sup>29</sup>. For these campaigns, the organizers of Expo 2020 collaborated with the Department of Tourism and Commerce Marketing (DTCM), ticket resellers, tourist offices, tour operators and travel agencies (Haneef & Ansari 2019)<sup>30</sup>.
4. October 2021-March 2022 (Duration Expo):
  - For traditional media formats, Expo 2020 held daily press conferences with international media to showcase various aspects of the event and its site<sup>31</sup>. For digital and social media formats, Expo 2020 had an in-house team of 23 content creators, editors, photographers, and copywriters. Spanning all official Expo 2020 social media platforms<sup>32</sup>, they produced 200 pieces of content per week. Additionally, they partnered with influencers to increase outreach (Arabiat 2022).
  - An important component of Expo 2020’s communication during the event was “Virtual Expo”<sup>33</sup>. Partnering with Google, Expo 2020 developed immersive virtual tours, allowed visitors to experience the event in a hybrid way with Web-based augmented reality, broadcasted events and concerts with YouTube Live streams, and created specific live display ads to allow streamers to browse the internet whilst following events live (Google 2023).
  - To increase the visibility, relevance, and attractiveness of the event, Expo 2020 attracted many celebrities. In addition to official performers and singers<sup>34</sup>, Expo 2020 invited many celebrity visitors such as footballer Cristiano Ronaldo, Bollywood star Ranbir Kapoor or South Korean President Moon Jae-in (Lau 2022).

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<sup>29</sup> The first one (“What to Expect Campaign”) took place in May 2021. The second one (“Ticket Sales Campaign”) took place in July 2021. The third one (“Countdown + Opening Campaign”) ran from September 2020 to the beginning of the event (Expo 2020 Dubai 2021, 45).

<sup>30</sup> Conjointly with these direct efforts to promote Expo 2020, other campaigns simultaneously advertised Dubai as a destination. Of note are “A Story Takes Flight” (2019) showing Hollywood stars Gwyneth Paltrow, Kate Hudson and Zoe Saldana exploring Dubai, as well as “Dubai Presents” (2021) with Zac Efron and Jessica Alba (Kickham 2021).

<sup>31</sup> Interviews of the authors with professionals who worked for Expo 2020.

<sup>32</sup> Facebook, Instagram, TikTok, LinkedIn, YouTube, Snapchat, Twitter.

<sup>33</sup> Even though the virtual access to the Expo had been planned since 2012, the Covid-19 pandemic led the event’s organizers to improve the quality and accessibility of this feature.

<sup>34</sup> E.g. Christina Aguilera, Norah Jones, Bamboo, etc.

In addition to these international campaigns, Dubai communicated domestically about Expo 2020 on TV, radio, podcasts, OOH, digital and print media to generate buy-in from its residents and secure the help of volunteers (Haneef & Ansari 2019).

In the following, we assess the impacts of Expo 2020 on Dubai, and the effectiveness of its communication strategies in leveraging the event for its nation/city branding.

## Expo 2020: Nation branding impacts

As outlined in the literature review (pp. 8-9), the nation branding impacts<sup>35</sup> of mega-events can be measured with two methodologies. The first one directly assesses changes in national image through nation brand indexes, and/or media analyses. The second one indirectly assesses the nation branding effects by considering event-related economic outcomes, which are considered adequate proxies. In the following, we use both methodologies to assess the nation branding effects of Expo 2020 Dubai<sup>36</sup>.

### Direct assessment of Expo 2020's nation branding impacts

#### Changes in National Image

##### Pre- and post-event comparison of the UAE/Dubai's score in nation/city brand indexes<sup>37</sup>

Some nation brand indexes recorded an improvement in performance for the UAE's brand following the event, compared to earlier years. For instance, Brand Finance, a consultancy producing a prominent nation brand index<sup>38</sup>, gave the following scores to the UAE from 2019 to 2023:

- 2019: 20 (Brand Finance 2019)
- 2020: 18 (Brand Finance 2020)
- 2021: 17 (Brand Finance 2021)

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<sup>35</sup> Which refers to changes in the city/nation brand equity.

<sup>36</sup> The media analysis is presented in the assessment of Expo 2020's communication strategy.

<sup>37</sup> Precise assessments of Dubai's brand's equity through brand indexes are difficult to produce for three reasons. The first is that most statal brand rankings focus on the nation, by contrast with the city. Consequently, Dubai is often subsumed within the UAE, which does not always allow for a precise measurement of its own brand equity. Second, brand rankings' reports for the pre-2010s are challenging to find, which hampers comparative efforts. Third, different rankings diverge from one another regarding the performance of the UAE/Dubai's brand. Nonetheless, it is clear that Dubai has been extremely effective at building a strong, recognizable, and durable brand (Interview of the authors with Dr. Koch).

<sup>38</sup> See p.7 for more information on its methodology.

- 2022: 17 (Brand Finance 2022)
- 2023: 16 (Brand Finance 2023)

The score of the UAE improves slightly following the event. Brand Finance researched the specific effects of Expo 2020 on the UAE's brand value and soft power. According to this research, as of 2023 Expo 2020 added \$20.6 billion, or 11.2%, to the brand value of the UAE. In terms of soft power, it raised the UAE's ranking to the 10<sup>th</sup> place, a gain of five places compared to 2022, putting it in the Top 10 for the first time. Crucially, Brand Finance found the Expo 2020-linked improvements in the UAE's brand to be most pronounced for the following elements: "trustworthiness", "easy to do business with", "helpful to countries in need" (Brand Finance 2023). This signals a shift from earlier brand perceptions, aligning with the city's ambitions of increasing its influence as an international political and business partner<sup>39</sup>.

City branding indexes concur with this positive assessment. Resonance Consultancy, a tourism and real estate consultancy, ranked Dubai 22<sup>nd</sup> in its 2017 "World's Best Cities Report" (Resonance Consultancy 2017) whilst it ranked Dubai 5<sup>th</sup> best city in the world in 2023 (Kumar 2023).

However, at least one other nation brand index recorded a worsening of the UAE's brand performance. The Anholt-Ipsos Nation Brands Index (NBI) ranked the UAE 42<sup>nd</sup> in 2020, 45<sup>th</sup> in 2021 and 46<sup>th</sup> in 2022 (Ipsos 2021; 2022)<sup>40</sup>.

For visitors of the Expo, the direct impact seems to have been unambiguously positive. Before-and-after surveys indicate a 72.6% increase in visitors' knowledge of the UAE's culture, history, achievements, and values, which could lead to spillovers of positive perceptions when these views are shared through word-of-mouth (Ernst & Young 2023).

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<sup>39</sup> See p. in Annex 3, p.47, for a presentation of Dubai's historical branding efforts.

<sup>40</sup> There is no explanation in the documentation for this drop. One hypothesis is the greater emphasis put by Anholt on the "goodness" for a country, which broadly aligns with Western-style democratic values. In this perspective, it is possible that the UAE's brand was damaged by events related to Latifa Al-Maktoum (see p.23).

Considering the evidence, it is very likely that Expo 2020 had positive impacts on the brands of Dubai and the UAE, even if their magnitude is unknown<sup>41</sup>. The professionalism and quality of planning of the event were widely recognized<sup>42</sup>, and no significant reputational issue emerged during the event. The Expo strengthened the city's status as a business hub<sup>43</sup> and as a geopolitical power. By providing a venue for 192 nations to meet, the UAE appeared to promote tolerance and collaboration<sup>44</sup>, forwarding its diplomatic objectives (Schrader 2021). More importantly, the Expo's focus on inclusive and sustainable progress generated much attention (Commetric 2022) and helped the country build legitimacy ahead of the COP28. The evidence from Brand Finance indicates that the event was particularly successful at promoting the UAE's image as a trustworthy, competent, and empathetic partner. This allowed Dubai to add nuances and complexity to its city brand, significantly contributing to the construction of a more mature brand in line with its recent strategic pivot, based on knowledge, innovation, and international presence<sup>45</sup>.

Ultimately, Expo 2020's city branding successes will also be determined by the future of the event's site, Expo City, "the human-centric city of the future", which was planned to become a permanent fixture in Dubai. The hosting of the COP28 at Expo City can help leverage Expo 2020 and allow Dubai to use it as a springboard for its future nation/city branding efforts, highlighting its role in innovation, sustainability, and international governance<sup>46</sup>.

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<sup>41</sup> Dubai had a strong nation brand before the event, and the lack of dramatic increase in score does not mean that the Expo's effects were negligible. Instead, the most remarkable change seems to have been the new attributed conferred to Dubai/UAE's brands.

<sup>42</sup> Our interviews with individuals having visited Expo 2020 highlighted the professionalism, high quality of the organization, and wide array of entertainment opportunities available during the event.

<sup>43</sup> See below, p.22.

<sup>44</sup> Notably by hosting Israeli and Iranian pavilions.

<sup>45</sup> See p.47 in Annex 3 for more information about Dubai's strategy and its post-2008 pivot.

<sup>46</sup> For instance, during the COP, Dubai could use some aspects of Expo 2020 as inspirational examples, such as success stories and promising innovations. By doing so, Dubai could appear as a forward-thinking, optimistic, and practically minded actor on the international stage. This could significantly enhance the Expo 2020-related nation branding outcomes. It is therefore in the future that the true, long-term effects of Expo 2020 will be noticeable.

## Indirect assessment of Expo 2020's nation branding impacts

### Expo 2020-related economic outcomes

Expo 2020's direct contribution to the UAE's economy from 2013 to 2042, measured with a gross value added (GVA) metric, is estimated to be \$42.2 billion, with the creation of 1'039'000 full-time equivalent jobs per year (Ernst & Young 2023)<sup>47</sup>. The event boosted the hospitality, aviation, and tourism sectors (Kamel 2022), contributing to the emirate's recovery from the Covid-19 induced economic downturn (Shiraz 2021)<sup>48</sup>.

The economic contributions were also indirect, the event being leveraged to catalyze corporate networking events. The Dubai Chamber of Commerce was the Official Business Integration Partner of Expo 2020 and held 98 events bringing together 25'000 participants from 130 countries, facilitated 1'500 bilateral business meetings, and received 1'746 visiting delegations from over 60 countries. As a result, a survey revealed that 76% of companies in Dubai subsequently experienced improvements in growth (Dubai Chamber of Commerce 2022).

Economic assessments are subject to uncertainties, especially since no definitive figure is available for Dubai's expenses as host of the event. Some of the observed economic improvements could be attributed to other aspects of Dubai's business, legal and political environment. Moreover, most of Expo 2020's economic impacts will only materialize in the long-term, which makes it difficult to currently assess them. However, the evidence points to a positive impact of Expo 2020 on Dubai's and the UAE's economy, even if its magnitude is difficult to quantify.

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<sup>47</sup> In relation to EY's 2019 report, both figures exceed earlier forecasts by 26% and 15% respectively (Ernst & Young 2023).

<sup>48</sup> For instance, 2021 alone saw the number of visitors increase by 21% and the number of transit passengers through Dubai International Airport increase by 12.7%, as compared to 2020. Expo 2020 also spurred growth in UAE non-oil exports in 2021, with an improvement of 33% as compared to 2020 (Strohal Lehal Group 2022).

## Assessment of Expo 2020's Communication Strategy

The assessment of the communication strategy must be conducted in relation to its targets. The first target was to attract visitors. Expo 2020 expected to welcome 25 million visitors, of which 55% were expected to be international. The actual figures amounted to 24.1 million visitors, of which 30% were international (Ernst & Young 2023). Therefore, the attraction of international visitors fell short of expectations.

To assess whether this shortcoming was localized in one country, we compared the markets targeted by the communication strategy with the countries of origin of international visitors. Since they overlap significantly, ruling out the possibility of an ineffective country-specific communication strategy, this suggests that the initial forecast was overly optimistic, and/or that the overall communication strategy was not as effective as planned<sup>49</sup>.

To assess the success of the overall communication strategy, we conducted a traditional media analysis<sup>50</sup> by reading Expo 2020-related articles from newspapers around the world<sup>51</sup>. Our analysis revealed that the number of articles concerning Expo 2020 was surprisingly low for an event of this importance, which could have resulted in low levels of awareness of the event. In terms of valence<sup>52</sup>, even though many articles were positive, some also took a negative perspective and highlighted elements such as the treatment of workers and the story of Latifa Al Maktoum, the daughter of Dubai's ruler, who allegedly tried to escape and was forcibly brought back to Dubai (McCullen 2021). The extent to which this provides insights into how the image of Dubai changed is unclear, however.

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<sup>49</sup> Of course, the impact of Covid-19 cannot be ignored, and it is very likely that absent the pandemic the impact of Expo 2020 would have been much greater in terms of visitors' numbers, media visibility, and awareness levels, with impacts on nation/city branding.

<sup>50</sup> In other analyses, the media analysis would have been included in the section on the direct impacts of the event on nation branding, in terms of changes in the national image. However, considering our focus on communication, we decided to integrate it within an assessment of the communication strategies of Expo 2020.

<sup>51</sup> See the Methodology for more details (p.41).

<sup>52</sup> Term of social cognition referring to the positive/negative attitude towards the attitude object. <https://www.alleydog.com/glossary/definition.php?term=Valence#:~:text=In%20psychological%20terms%2C%20valence%20indicates,only%20a%20minimal%20emotional%20valence.>

The results for social media are more encouraging. According to the analytics' team of Expo 2020, the average reach of an official social media post on any platform was 6.5 million people, with 80% of reach being organic<sup>53</sup>. The estimate for the influencers' reach is much higher (Arabiya 2023)<sup>54</sup>. These analytics' numbers are very high and indicate that the social media strategy effectively reached audiences. However, absent a geographic/demographic breakdown, there is no indication on the audiences that were most successfully reached. Similarly, it is difficult to properly assess the general valence of social media reactions to the event absent a large-scale quantitative analysis. The 251.2 million virtual visits nonetheless suggest that the social/digital campaigns were effective in generating interest in the event.

Interviews with professionals having worked for Expo 2020 provided other insights in terms of communication. Much care was taken to have the site ready in time to avoid repeating the delays and disappointing performance of Expo 2015 Milan. For instance, the organizers emphasized the fact that the postponement of the Expo was solely due to the Covid-19 pandemic. During the event itself, following the first weeks the press conferences attracted few journalists. One lack in this regard was the relative absence of Emirati personalities in press conferences, which would have made the press conferences more personal and interesting. In addition, according to these professionals, the event's branding strategy did not translate into a clear message and confusion remained as to what the Expo was. Finally, if all recognized that the event had been well-run, the overall impression was that there had been some significant missed opportunities. For instance, more efforts should have been devolved to highlight small countries' pavilions, instead of traditionally important ones. Or, importantly, Expo 2020 could have been the site of high-level agreements, announcements, and declarations, which would have been beneficial to the signatories and the event.

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<sup>53</sup> Organic reach is a metric aggregating the number of unique accounts having seen a piece of content on a social media platform. <https://www.hopperhq.com/social-media-marketing-glossary/organic-reach/#:~:text=Organic%20Reach%20is%20a%20metric,have%20seen%20the%20post%20once>.

<sup>54</sup> The most important influencer is probably HH Mohammed bin Rashid Al Maktoum, with a Twitter account followed by 11 million people.



## Conclusion

When Dubai was selected to host the Expo 2020, on the heels of the 2008 financial crisis, the city was in the midst of a strategic transition<sup>55</sup>. Dubai shifted its branding strategy and endeavored to become a city of innovation in tune with the global issues of our times. Expo 2020 was an opportunity to highlight this shift and craft a new image for the city. Our assessment of the success of Expo 2020 regarding these nation branding efforts is mixed. On the one hand, indirect and direct evidence suggests that Expo 2020 had positive nation branding impacts. Specifically, the event enriched Dubai's brand, connecting it to broader discourses of innovation, global issues, sustainability, and international collaboration.

On the other hand, considering the importance of the event and the resources mobilized to host it, these effects are somewhat underwhelming. This is puzzling, as Dubai seems to have followed best practices and learned from previous mega-events. The Expo was well organized, its branding platform was aligned with the city brand strategy, Emirati culture was highlighted, leverage and legacy-planning were clearly important to the organizers, diverse stakeholders were involved in the planning of the event, the potential of social media was clearly understood, etc. In retrospect, from a communication point of view, three elements<sup>56</sup> seem to explain this lack of greater impact<sup>57</sup>:

1. Expo 2020's branding platform was complex and multilayered, and tried to communicate too many things at once<sup>58</sup>. Consequently, it did not translate into a clear and memorable message. Our interviews with professionals having worked for Expo 2020 highlighted the confusion concerning the event, its purpose, and its links to Dubai. The event likely suffered from missed opportunities precisely because it tried to capture too many of them. A simpler, streamlined branding and communication strategy would have delivered a stronger, more memorable message.

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<sup>55</sup> See Annex 3 p.47 for more background information on Dubai and the UAE.

<sup>56</sup> These lessons are integrated within the Guidebook (p.36).

<sup>57</sup> The Covid pandemic undoubtedly had many effects on Expo 2020, from visitor numbers to the levels of awareness generated by the event. However, it is very difficult to quantify these effects, as it is plausible to argue that the pandemic could have had both positive and negative effects. For instance, if it might have reduced the number of physical visitors, it might have increased the number of virtual visitors, as an inspirational event would have been a welcome distraction during lockdowns. As a result, we only mention it as a factor whose effects are undetermined.

<sup>58</sup> For instance, the extent to which visitors understood the idea that innovation was linked to the UAE's history is unclear.

2. Coordination between Expo 2020 participants was insufficient, as evidenced by the relative disempowerment of small pavilions or the lack of high-level agreements announced during the event. This lack of coordination is in part the result of the overly complex branding strategy, which probably diluted the resources of the organizers. A simpler branding strategy would have led to more concentrated efforts to effectively coordinate participants and advance common agendas. This would have yielded stronger results in terms of communication and nation branding, as Dubai would have positioned itself at the center of these coordination efforts.
3. The media strategy should have been more proactive in terms of outreach, as evidenced by the low number of newspaper articles and the lack of personalities available to interact with the media during Expo 2020. The event, and Dubai, would have greatly benefited from a more dynamic outreach and media strategy. For instance, key Emirati personalities could have been groomed to become ambassadors and spokespeople of the event, traveling and promoting it in international media ahead of the Expo.

In the following, we present our second case study.

## Case study: FIFA World Cup Qatar 2022

In this case study, we examine the nation branding impacts of the Fifa World Cup Qatar 2022 (hereinafter World Cup) on Qatar, and explore the extent to which communication enhanced these impacts. After a brief presentation of the World Cup, we study the branding and communication strategies of the event. We then assess the nation branding effects of the event through direct and indirect impacts. Finally, we assess the communication strategies used to enhance the nation branding effects of the event.

### FIFA World Cup Qatar 2022: General presentation

Qatar's decision to host the World Cup can be attributed to several reasons:

- Qatar aims to increase its international influence and build a national brand, and seeks to leverage mega-events as a powerful economic and (geo)political tool (General Secretariat 2008; Ministry of Development 2018).
- Qatar's long-term vision<sup>59</sup> identifies sports as a core pillar of social and economic development (Muftah 2022). The country aims to diversify its economy by becoming a global center of sports expertise and excellence. Qatar also recognizes the potential of sports in addressing domestic health challenges such as obesity and diabetes (Qatar National Health Strategy 2013a, 2013b). Through the hosting of major sporting events, Qatar aims to encourage physical activity and foster a sporting culture.
- Qatar intends to host mega-events to showcase its values, culture, and hospitality to the world (Næss 2023). The hosting of the World Cup presented an opportunity to appear on the global stage to highlight the country's modernity and opportunities (Alqabas 2022).

#### Timeline

- 2<sup>nd</sup> December 2010: Fifa awards the hosting of the World Cup to Qatar.
- 20<sup>th</sup> November-18<sup>th</sup> December 2022: The World Cup takes place in Qatar, welcoming 3.4 million fans, with 5 billion people engaging with the event at one level (Fifa 2023).

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<sup>59</sup> Outlined in Qatar's National Vision 2030.

## FIFA World Cup Qatar 2022: Branding Strategy

Qatar's National Vision 2030 provides the basis of Qatar's branding strategy, which aims to craft the image of a modern, responsible, and competent state. Since the announcement of Qatar's winning bid for the World Cup, the event drew criticisms about human rights violations, Qatar's treatment of LGBTQ communities, and restrictions on freedom of expression (Khalifa 2020). As a response, Qatar implemented various policy reforms and sought to further develop its image as a modern nation integrating within the international community (Almaskati 2022). For instance, Qatar implemented the Worker's Welfare program to address concerns about workers' rights and allow Qatar to become a leader in the region in this regard<sup>60</sup>.

In the cultural domain, the organizers communicated about the cultural aspects of the tournament, encouraging tourists to explore Qatar beyond football and discover its museums, traditions, and natural landscape. This was an important part of the legacy – to transform Qatar into a vibrant destination for overseas tourists.<sup>61</sup>

Finally, the FIFA World Cup Sustainability Strategy, jointly developed by Qatar and FIFA, showcased Qatar's advances in sustainable development and innovation, including eco-friendly stadiums and transportation systems. This was another way for Qatar to showcase its modernity and alignment with international discourses (Al-Hamrani et al. 2021).

## FIFA World Cup Qatar 2022: Communication Strategy

Based on interviews with experts and the literature review, the communication strategy for each type of audience was as follows:

### 1. International Football Fans

Multimedia campaigns were launched to promote ticket sales, generate enthusiasm, provide information, and attract visitors to attend the World Cup in Qatar.<sup>62</sup> The World Cup was also the first mega-event to implement both a fan engagement and an ambassador program. The Fan Engagement Program developed a network of “fan leaders” from qualified nations, who shared information about the tournament with their local fan groups.

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<sup>60</sup> By offering training and reimbursement programs, establishing a medical system, providing physical and mental health support, and launching regular assessments, and consultation services. See [Workers' Welfare \(workerswelfare.qa\)](http://workerswelfare.qa), consulted on the 24<sup>th</sup> June 2023.

<sup>61</sup> Interviews of the authors with experts.

<sup>62</sup> For instance, social media platforms were leveraged to engage with fans, share updates, and create anticipation through interactive content and behind-the-scenes footage.

The Host Country Ambassador program recruited a group of high-profile ex-footballers<sup>63</sup> to promote Qatar and the event in the media.

## 2. Local Population and Gulf Cooperation Council (GCC) Countries

Campaigns were launched to highlight the expected positive outcomes of the World Cup for the region. This strategy aimed to promote volunteering, encourage participation in cultural events, and highlight the positive regional impacts of the tournament on the economy and infrastructure.

## 3. Media and Journalists

The organizers prioritized media relations to shape the narrative surrounding the event, by providing their full support to the international media, with streamlined accreditation process, top-class facilities, logistical support, and access to key figures and events.

## 4. Domestic Stakeholders

To host the World Cup, important domestic stakeholders<sup>64</sup> were recruited and involved in a coordinated effort.

In addition to these “offensive” media strategies, Qatar also had to manage a “defensive” public relations strategy to deflect criticism. The organizers were initially unprepared, and only belatedly engaged with their critics. This proved to be an innovative public relations strategy in the region, as most Middle Eastern nations faced with such criticism do not typically engage in dialogue with critics. In the final years leading up to the event, the organizers therefore tried to balance conciliation and assertiveness in their outward communications<sup>65</sup>.

## FIFA World Cup Qatar 2022: Nation branding impacts

As outlined in the literature review (p. 5), the nation branding impacts<sup>66</sup> of mega-events can be measured with two methodologies. The first one directly assesses changes in national image through nation brand indexes, and/or media analyses. The second one indirectly assesses the nation branding effects by considering event-related economic outcomes, which are considered adequate proxies.

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<sup>63</sup> Such as Cafu, Samuel Eto’o, Tim Cahill, and Xavi Hernandez

<sup>64</sup> Such as governmental entities; embassies; major national organizations across various sectors such as tourism, and education, strategic delivery partners such as the country’s national carrier, airport, transport ministries, etc.; and commercial partners.

<sup>65</sup> Interview of the authors with Mr. James Dorsey.

<sup>66</sup> Which refers to changes in the city/nation brand equity.

In the following, we describe the results for our analysis of the nation branding effects of FWCQ 2022 on Qatar, obtained through these methodologies. In this case study, the media analysis is complemented by the results of a survey conducted at the Graduate Institute of Geneva<sup>67</sup>, which gives indications on Qatar's national image and its changes.

## Direct assessment of FIFA World Cup Qatar 2022's national branding impacts

### Changes in National Image

#### Pre- and post-event comparison of Qatar's score in nation brand indexes

One prominent nation brand index (Brand Finance) gives Qatar the following scores from 2017 to 2023:

- 2017: 40 (Brand Finance 2017)
- 2018: 38 (Brand Finance 2018)
- 2019: 37 (Brand Finance 2019)
- 2020: 41 (Brand Finance 2020)
- 2021: 41 (Brand Finance 2021)
- 2022: 43 (Brand Finance 2022)
- 2023: 43 (Brand Finance 2023)

This evolution points to an improvement in the nation brand equity of Qatar, albeit not a significant one. Interestingly, the event itself does not seem to add brand equity, but it is the process that leads to this improvement. This might be due to the policy changes implemented by Qatar, which could have been the most significant drivers of the improvement in Qatar's image. We use the survey results to contextualize this result.

### Survey results

Results from the survey show that respondents perceived Qatar to have successfully organized the World Cup despite the controversies. The survey indicates that the great majority of people in the sample were not big fans of football<sup>68</sup>. Yet, during the World Cup, 36.2% reported a great increase in watching frequency, and 27.6% a slight increase.

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<sup>67</sup> For more details on the survey, see Annex p.44.

<sup>68</sup> Among the respondents, 58.6% of them never watch football games, and 32.8% watch less than one match per week during a month.

Amongst those who usually do not watch football, 47% started watching. This increase in frequency is similarly observed among people who watched football games before the World Cup. Given that the discussions over the human rights of the migrant workers could not be bypassed, we also asked how respondents weigh the importance of these issues with the football games. Results indicate that 63.8% of the respondents still paid attention to football, regardless of human rights issues. This suggests that many people probably overlooked the controversies and focused on the game.

When asked to describe Qatar, for people having never traveled to Qatar, human rights issues were more frequently mentioned than the political regime in Qatar, suggesting that the former should be a communication focus for the Qatari government in the future. For people having traveled to the country before, Qatar is characterized by its unfamiliarity, desert-hot weather, and extreme wealth. Although not evident from this survey, the high quality of service and rich culture are also frequently mentioned in other pieces of qualitative research, indicating a positive side of Qatar as a touristic destination (Karamanaga and Roje, n.d.).

Interestingly, people from different parts of the world hold different views of Qatar. Respondents from the West tend to focus on human rights and political issues, by contrast with individuals from the Global South, who are less focused on these issues<sup>69</sup>. The same situation applies to political issues.<sup>70</sup> This is consistent with findings from previous studies (King n.d.) and data gathered from our interviews with experts, which highlight the fact that individuals from Western countries tend to hold a more negative view of Qatar than people from non-Western countries.

As for gender differences, women from the samples had more negative views on human issues and fewer opinions on political issues compared to men<sup>71</sup>.

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<sup>69</sup> 62.5% and 59.4% of the people from the Global North chose gender inequality and human rights abuse respectively, while these two figures are only 52.4% and 38.1% for people from the Global South

<sup>70</sup> 43.8% and 40.7% of people in the West chose conservative and monarchy, compared to 33.3% and 28.6% for individuals from the Global South.

<sup>71</sup> 59.3% of female respondents chose gender inequality and 43.8% chose human rights abuse in Qatar compared to 48% and 48% respectively for male respondents. 28.1% of women picked conservative and only 21.9% would use monarchy to interpret this country compared to 48% and 44% of men.

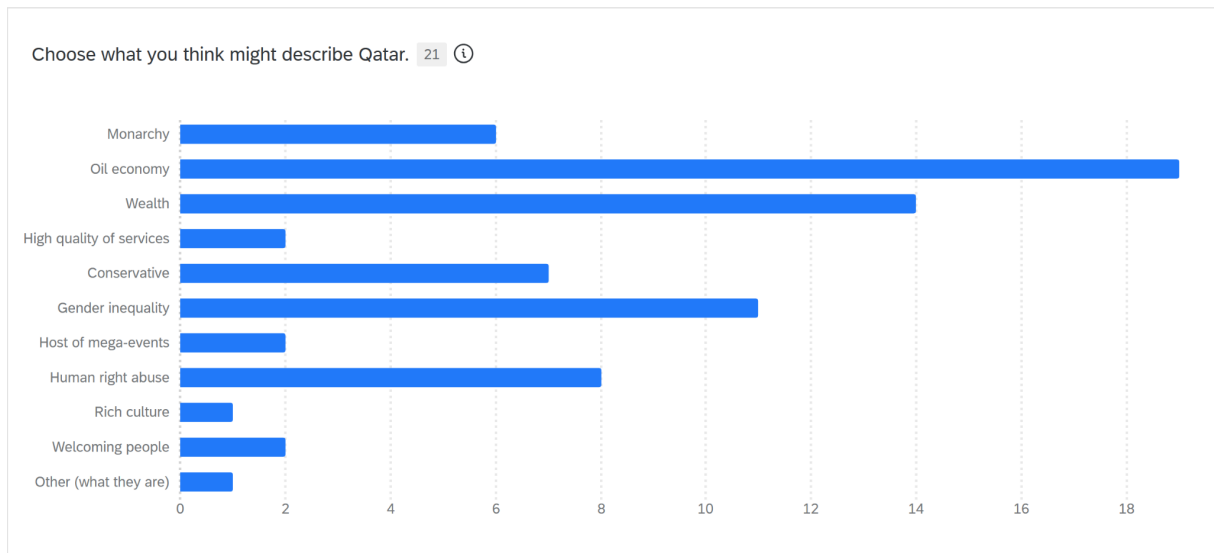


Figure. 2 Responses from the Global South

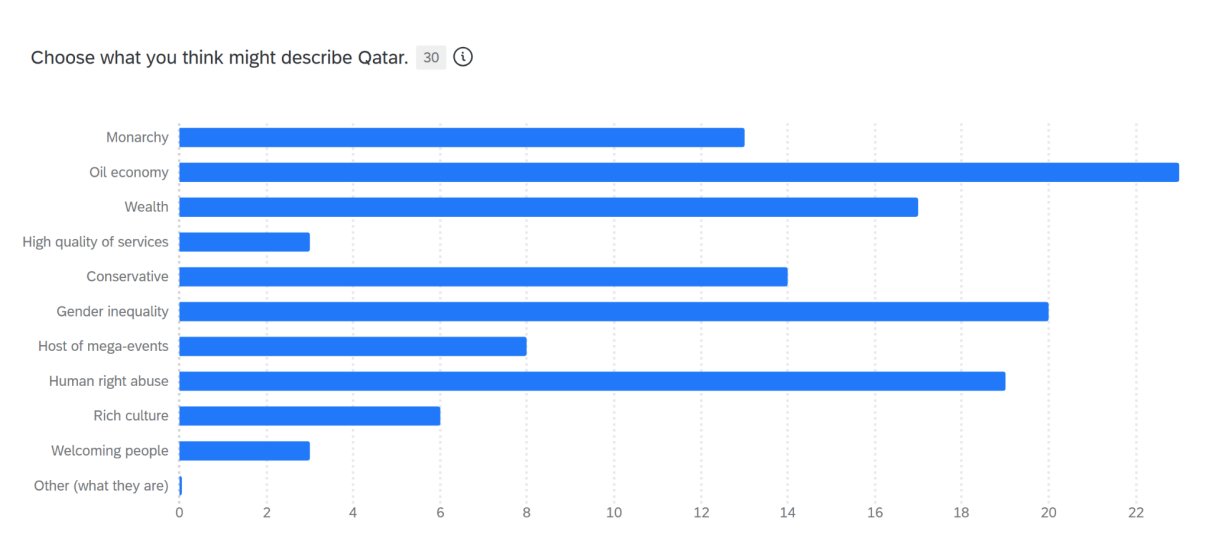


Figure. 3 Responses from the Global North

### Indirect assessment of FIFA World Cup Qatar 2022's nation branding impacts

#### FIFA World Cup Qatar 2022-related economic outcomes

Qatar spent 229 billion dollars to host the World Cup. Conversely, Qatar's real GDP growth increased from 1.6% in 2021 to 4.2% in 2022 and 2.4% so far in 2023 (IMF 2023). In the short term, then, the expenses significantly outweigh the expected returns. In the long run, however, Qatar expects more touristic arrivals. Before COVID-19, around 2 million tourists were visiting Qatar every year. A drastic increase in the number of tourists is observed on the graph during November and December 2022, and this trend continues in 2023. However, it is yet unclear what effect the World Cup will have on long-term touristic arrivals. The broader economic outcomes are similarly still unknown.



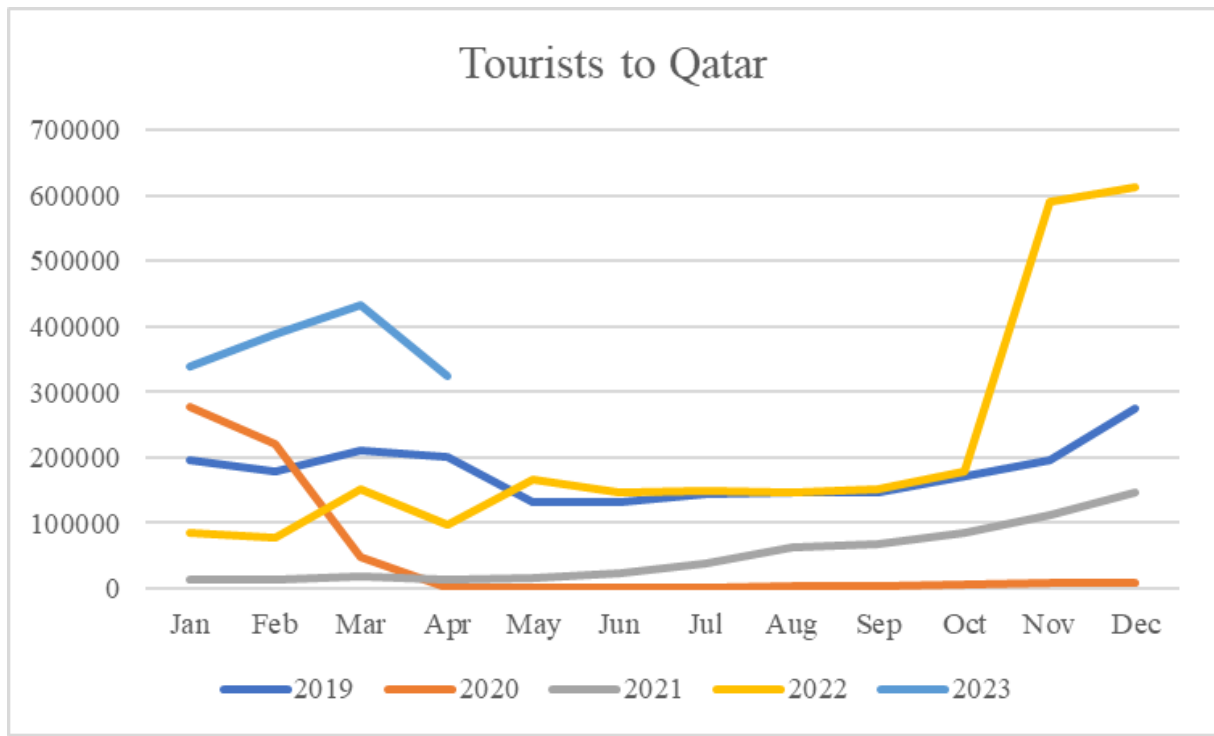


Figure.1 Touristic arrivals in Qatar: 2019-2023

### Assessment of FIFA World Cup Qatar 2022's Communication Strategy

To assess the event's communication strategy, we conducted a media analysis pertaining to the event<sup>72</sup>. The World Cup generated a lot of media reactions, and this level of exposure probably generated a high level of awareness. As for the survey, the valence of these reactions varied according to geographic location<sup>73</sup>. Qatar's communication strategy suffered from an important deficit early on, which had repercussions for Qatar's subsequent communication efforts. The organizers of the World Cup did not expect the intensity of the criticism triggered by the announcement of Qatar's winning bid<sup>74</sup> and were unprepared. This led to a loss of momentum in the media discourse, which was quickly captured by individuals holding negative views of Qatar<sup>75</sup>.

In this regard the communication strategy of the World Cup did not significantly improve Qatar's image. Studies show that the event did not improve Qatar's image on social media platforms despite the various communication efforts of the organizers (Dun et al. 2022).

<sup>72</sup> As for Expo 2020 Dubai, a quantitative media analysis would have produced more numerous, robust insights.

<sup>73</sup> For instance, newspapers from the West tended to be more negative and critical of Qatar, whilst newspapers from the rest of the world were more positive.

<sup>74</sup> Interviews of the authors with experts.

<sup>75</sup> Much of this negative commentary was biased and had Islamophobic undertones. (Interview of the authors with Mr. James Dorsey)

For traditional media, Western newspapers still perceive Qatar as “exotic, strange, corrupt, dangerous, and an Islamic terrorist friendly country” (Swart and Hussain 2023)<sup>76</sup>. This highlights the durability of perceptions and biases, and the difficulties faced by nations endeavoring to challenge/change them. It is possible that the slight improvements in Qatar’s brand equity in the years running up to the World Cup were partly due to the publicization of Qatar’s policy changes around controversial topics. If this is the case, the leveraging of policy changes for nation branding purposes was effective, as was the shift in communication strategy that saw the organizers engage with critics, striking a balance between assertiveness and conciliation.

## Conclusion

Overall, the World Cup had some positive nation branding impacts on Qatar. It put Qatar “on the map” and showcased its ability to successfully host a mega-event of unprecedented size in the region. This made many Middle Eastern citizens proud, and it is a legacy that Qatar is likely to benefit from<sup>77</sup>. The full extent of these nation branding impacts will only be observable in the long run, however. For instance, the effects of the World Cup on perceptions from citizens in non-Western countries outside of the Middle East are still unclear. More importantly, the long-term legacy of the World Cup and the degree to which Qatar will be able to diversify its economy following the event are uncertain (England & Kerr 2023). In retrospect, from a communication point of view, three insights can be gained from this case study:

1. Pre-event preparation is essential. Qatar should have prepared a contingency strategy to manage negative perceptions ahead of the announcement of the winning bid, and it should have prepared the ground in advance (See Guidebook).
2. Mega-events can catalyze policy changes, thereby changing the country from the inside to portray a different image to external audiences<sup>78</sup>. Qatar leveraged the World Cup to implement some policy changes that went a long way in improving its image following early controversies.
3. Legacy planning should be explicit from the beginning. In contrast to Dubai and Expo 2020, the specific planned legacies of the World Cup for Qatar were unclear.

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<sup>76</sup> The effect on non-Western media is unclear.

<sup>77</sup> Interview of the authors with Mr. James Dorsey.

<sup>78</sup> There is a possibility that the Qatari government used the event to force policy changes onto their citizens, many of which are not favorable to some of the new orientations of Gulf countries, especially their growing openness. For more information, see Hertog 2017.

Qatar should have had a more coherent strategy to integrate the World Cup more fully with its development strategy. This raises the risk that much of the potential of the event will remain unrealized.

## Conclusion

These case studies highlight the importance of initial conditions to account for the nation branding impacts of a mega-event. If Dubai had a strong city brand, which Expo 2020 reinforced and added to, Qatar's brand was not established or strong. As a result, the challenges faced by the organizers were different. Both events were nonetheless beneficial for the nation/city branding of their hosts, even if their long-term impacts are difficult to quantify. One clear fact emerging from these case studies is that nation branding is a long-term endeavor. A single event cannot, by itself, change the image of a nation/city. At best, if well planned, it can highlight certain elements which the host wants to be highlighted. At worst, it draws attention to elements that the host would have wanted to stay out of the limelight. The context of the Middle East and Gulf is particular, as the region is often misunderstood and associated with stereotypes. Nonetheless, as Dubai shows, nation branding can be extremely effective at challenging preconceptions associated to Middle Eastern nations. As more people travel to the region to attend mega-events, for business and/or holidays, perceptions will change. In this perspective, mega-events can support broader nation branding efforts if they are well planned, well integrated within a development strategy, and if their communication strategies are effective. In the following, we present a guidebook synthesizing insights derived from this report. It provides practitioners with actionable insights on communication strategies to enhance the effectiveness of mega-events in a nation branding perspective for Gulf nations.

# Guidebook

## Nation branding and mega-events in the Gulf

- A mega-event can generate nation branding effects only if a clear and well-designed nation brand already exists. Mega-events are enhancers/transformers of a nation brand. They do not by themselves create one. Gulf nations should carefully design and craft nation brands before considering hosting any mega-event. This will prepare the ground for positive event-induced nation branding effects.
- The creation/renewal of a nation brand must be conducted in consultation with key stakeholders within the nation so that the brand can be credible and benefit from buy-in. This also allows for effective leverage if a broad constituency of national actors can be recruited. The influence of Gulf governments within their states is an asset in this regard.
- Nation branding is a long-term project that must be managed consistently, holistically, and strategically. The political systems of Gulf countries make them well positioned to successfully plan and implement consistent long-term strategies.
- A nation brand must be credible and highlight truthful elements of the nation. The hosting of mega-events by Gulf nations is likely to elicit more scrutiny than other, more well-known destinations. As a result, for these nations to appear trustworthy and credible, it is important to construct brands that highlight truthful elements with a reliable link to reality.
- Nation branding should be context-specific, relevant, and differentiating. Gulf nations are increasingly confident and assertive, and their nation brands should promote the specific models they are pursuing. Similarly, individual Gulf countries, especially Qatar and Saudi Arabia, must distinguish one from another and not follow a homogeneous strategy.
- A nation brand should be simple and direct to make it more distinctive and memorable. Complex branding strategies are likely to be misunderstood. Gulf nations should find a limited number of elements that they want to emphasize, and that constitute their competitive advantages, and build consistent brands around them.

- Gulf countries should have more brand ambassadors representing the national brand abroad. This would help raise brand awareness, and their personalization of the nation brand would convey a more positive and relatable image of their countries<sup>79</sup>.

### Leveraging mega-events<sup>80</sup> for nation branding

- The hosting of mega-events should be aligned with broader economic and political strategies. The mega-events' branding and communication platforms should align with nation branding strategies, and expected legacies should be formulated from the beginning. Mega-events are complex and costly, and nations must have clear reasons to host them. Gulf countries should not engage in the hosting of mega-events mimetically for the sake of regional competition. Clear intentions and planning are essential.
- Mega-events should be leveraged as public diplomacy instruments<sup>81</sup>. In particular, Gulf nations should integrate cultural initiatives within, or on the sidelines, of their mega-events. This cultural approach is likely to improve their images, attract visitors, and mitigate the effects of negative stereotypes<sup>82</sup>. Similarly, mega-events should be leveraged to signal a change of policy orientation to the world, like Qatar did with the World Cup. This would increase the visibility of the event and the policy change simultaneously. Saudi Arabia, for instance, should use this strategy if it plans on implementing significant policy changes in the future.
- Domestic advocacy should be conducted to gain the support of economic, political, and civil society actors, as it is essential to the success of a mega-event and its nation branding effects. This will transform national actors into effective brand managers.
- Coordination between the organizers and the local partners throughout the mega-event itself is paramount. This will ensure that any leverage is pursued consistently, coherently, and effectively.
- Clear and measurable goals should be fixed from the beginning to allow for monitoring, fine-tuning and institutional learning. The hosting of mega-events is likely to continue in Gulf countries, and it is important to leverage the learning process.

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<sup>79</sup> For instance, see Dinnie (2018, 277).

<sup>80</sup> For more details about leverage and its practice, see Brittain et al. (2018).

<sup>81</sup> Which supposes that Gulf nations should have public diplomacy strategies. They should strategically frame and promote their cultures, engage in dialogue with a wide variety of audiences, cultivate trust and credibility.

<sup>82</sup> See Cull (2019) for more details.

For instance, events' planning organizations can be institutionalized as a corporation to preserve this learning in the form of an institutional memory.

- Leverage should be pursued even after the event and fit within the broader mix of policies/communications/development strategies.

### Communication strategies for mega-events

- Communicators should focus on three elements that cut across all recommendations:
  - 1) Simplicity: simple messages are more effective than complex ones.
  - 2) Framing: thoughtful framing allows an actor to impart to others a certain perception of an object or reality.
  - 3) Momentum: the capture of momentum gives an actor the power to impose its framing and to “crowd out” other perceptions in the minds of target audiences.
- Communication is an ongoing process and the nation branding effects of particular mega-events will largely be determined by earlier communication efforts. This highlights the importance of broader communication efforts for mega-events to have any significant impact. Gulf nations should therefore pursue a large array of communication strategies besides the hosting of mega-events.
- The communication strategy and platform for a mega-event should be aligned with its nation branding, economic and political goals. This particularly applies to the selection of target audiences. Strategic targeting, and subsequent communication, will ensure that communication resources are effectively deployed to forward broader objectives.
- Communication strategies to promote and support mega-events in a nation branding perspective should be developed before the official announcement of the nation. Marketing and public relations campaigns should be launched upstream of the event (6-12 months before the announcement<sup>83</sup>) to frame a narrative about the host nation and its positive attributes. This would “crowd out” other perceptions within target audiences and give the communication momentum to the host nation. Contingency plans should be designed to react to any negative reactions from the press and other actors.
- Negative subjects should be communicated about directly, but strategically framed. This will allow the host nation to control the narrative, whilst appearing honest and open to dialogue.

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<sup>83</sup> This timeframe was selected to allow for the solidification, stabilization, and memorization of certain images in target audiences.

- The communication platform should highlight a limited number of simple, consistent, and memorable messages. This increases the degree to which target audiences remember or associate the host nation to strategically chosen elements.
- Communication for a mega-event should be pursued after gathering a detailed knowledge of formats, audiences, local contexts, and frames. In the case of an international communication campaign, the broad communication strategy should be adapted to each region and media. This is important for Gulf nations, as our case studies demonstrated that they are perceived very differently around the world.
- A mega-event concentrates attention, and the communication efforts of a host nation should therefore be proactive, sustained, and dynamic throughout the hosting of the event. Gulf nations hosting mega-events should therefore have communication strategies ready for the whole duration of their events. Communication should also continue after the event, as this is the period during which are formed lasting images of the event as a whole.
- Echoing the need for nation brand ambassadors, popular personalities of the host country should become the ambassadors and “faces” of the event. These individuals could be the lead organizers of the event, but they could also be given more ceremonial roles, which would give them the time to be visible and approachable. Charismatic and popular individuals could therefore become a focus of the media in themselves, which would naturally drive interest for the event.

## Limitations of this report

This report allowed us to generate insights and fill some of the gaps linked to the connections between mega-events and nation branding in the Middle East. However, several limitations must be mentioned:

- The phenomena considered in this report are inherently complex and affected by a multiplicity of factors. As such, if we considered the factors that we deemed most relevant, our study did not account for all of them.
- Our case studies are recent, which reduces the extent to which long-term nation branding effects can be measured. Similarly, the extent to which our insights will be applicable in the future is unclear.
- Despite the similarities between Gulf countries, and between Middle Eastern countries, significant national differences may significantly affect these nations' branding efforts. As such, the importance of a contextual analysis cannot be emphasized enough.
- Our methodology was mostly qualitative. More quantitative analyses would have generated more numerous and robust insights, especially for media analyses.



## Annex

### Annex 1: Detailed Methodology

#### Choice of case studies

We choose the Expo 2020 Dubai and the Fifa World Cup Qatar 2022 as case studies as these events are the latest and largest mega-events to take place in the region. Importantly, they were hosted in two different countries, which allows us to examine the ways in which specific contexts can affect the phenomena we want to study. As such, we believe that our case studies yield results that can have a broad applicability in the region.

Our choice of Saudi Arabia as a nation for our final recommendations<sup>84</sup> is informed by the growing importance of the country in the hosting of mega-events. We believe it very likely that Teneo will work in the country in the future, and we think that such focused recommendations will complement our report.

#### Use of primary and secondary sources

A significant part of our work required the reading of secondary sources written by academics, industry experts, and journalists/commentators. When possible, we chose diversified sources to approach our topic from different angles. A few observations are worth noting pertaining to secondary sources. First, the research on mega-events and nation branding in the Middle East is not extensive. It is also asymmetrical, since many of the articles covering the region emanate from the region, which raises some difficulties that we will soon address. Moreover, the events that led to our case studies were without precedents, as they were the most important international mega-events to occur in the region. As such, our research involved much triangulation between works in adjacent disciplines, for instance in political economy and media. Second, some of the research produced on Gulf countries, in Gulf countries, tends to be slightly sycophantic, with expression such as “great leadership with a great vision [...] Sheikh Rashid’s big thinking, creativity, adventure, and optimistic nature” (Althani 2023) or “Dubai has some unique advantages. First and foremost its leadership has been strong and endowed with great vision” (Balakrishnan 2008). Incidentally, these two authors work for academic institutions in Qatar and the UAE respectively. This does not necessarily vitiate their research but it does suggest that, as with Gulf media, certain precautions are to be used when using these resources.

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<sup>84</sup> Which we will propose on the 20<sup>th</sup> of September during a presentation at the Graduate Institute of Geneva.

The limited freedom of speech in Gulf countries, coupled with clientelist dynamics, may indeed induce a certain framing of issues and self-censorship in published authors. Third, and conversely, in some parts of the world Gulf countries are frequently stereotyped and associated with certain preconceptions. If this is in itself a source of information for our work, it also meant that we had to be critical in interacting with certain sources.

In addition to secondary sources, we consulted primary sources when it was applicable. For instance, in order to understand the communication strategy of Expo 2020 we read some of the documentation produced to inform these choices. We also consulted economic figures coming from government agencies to inform some of our assessments related to case studies.

### Media analysis

To assess the success of communication strategies used during the events chosen for our case studies, we conducted a traditional and social media analysis.

For the traditional media analysis, we examined articles related to these events in newspapers around the world. The limited duration of the project unfortunately did not give us the opportunity to a conduct quantitative analysis, even though we used some secondary sources that did so. The resultant qualitative analysis was not as insightful as we had hoped. We gathered some insights related to the number of articles concerning a topic, which we considered as one proxy for the level of awareness related to the event and assessed the overall tenor of articles for a certain region in the world.

However, even in one country views differed according to the specific newspaper (Eg The Financial Times and The Guardian for the United Kingdom), and only a precise analysis of readership numbers could have led to insights into how these views were spread in a certain market. The linguistic barrier was also an issue, as we weren't always able to fully understand the nuances of a newspaper's approach of the subject by reading Google-translated articles.

For the social media analysis, we relied on aggregated statistics (E.g. number of followers; subscribers on specific platforms; typical reach of posts; etc.) and secondary sources. As for traditional media, our qualitative analysis yielded limited results. We were able to broadly assess the extent to which events-related content was spread throughout social media platforms, which we again consider to be a proxy for the level of awareness about the events.

However, we did not have data related to the geographic and demographic audiences which interacted with this content. We similarly did not have the tools to analyze the kinds of reactions and comments elicited by events-related posts, except in an anecdotal fashion. The only way to conduct this analysis would probably be to perform market-specific studies, with large amounts of data, which is outside of the scope of our work.

## Interviews

To gather more information on nation branding and mega-events hosting in the Middle East, as well as on our case studies, we conducted semi-structured interviews using two interview guides (Interview Guide 1 for professionals having worked for Expo 2020 Dubai and Fifa World Cup Qatar 2022; Interview Guide 2 for the other interviewees) with:

- Professionals: We interviewed communication professionals having participated in the events of our case studies, and our questions focused on their insider's knowledge of the case studies. Two interviews were conducted via video, and the rest through emails. These individuals chose to remain anonymous.
- Academics (2): We interviewed two academics that accepted to respond to our questions. One academic on sports and diplomacy located in Qatar preferred to stay anonymous. The said academic could not find enough time to participate in an interview but responded to our written questions with voice notes on WhatsApp. The other academic was Mr. Steffen Hertog, an expert on the political economy of the Middle East at the London School of Economics. Mr. Hertog could similarly not find the time to talk to us, but he responded to our questions via email.
- Researchers (2): We interviewed Dr. Christian Koch, director of research at the Gulf Research Center, and Amnah Mosley, a researcher at the Gulf Research Center. We conducted these interviews via video, online.
- Journalists (1): We interviewed Mr. James Dorsey, a journalist and academic whose work focuses on the nexus between sports, politics and society in the Middle East, North Africa and Asia. We conducted this interview via video.

We intended to interview more individuals but received fewer positive responses than expected. Nonetheless, the interviews we conducted allowed us to integrate different perspectives in our work and provided us with insights that we did not find in secondary sources.

## Survey

We circulated a survey amongst students and staff members of the Geneva Graduate Institute of International and Development Studies to study the nation branding effects of the Fifa World Cup 2022 Qatar on the country. We collected 52 responses<sup>85</sup>, of which around 80% came from students and around 20% from faculty members<sup>86</sup>. The community of the Institute is international and highly diverse. As such, this sample constituted a sort of microcosm of the international community.

The survey contained questions on Qatar and the attributes that our respondents could associate to the country; the sports-watching habits of our respondents; their general interest in football; how they interacted with the Qatar World Cup; how they weighed football against other factors such as human rights issues; their travel intentions to Qatar, or their absence; their general attitude towards the country; how much their knowledge of the country was increased by the event; what news resources they consume. We included questions on gender and country of origin to link these variables to the responses provided on Qatar-related subjects.

The results allowed us to link perceptions of Qatar to the country of origin of our respondents, their gender, whether they were interested in football previous to the World Cup, and to the extent they consider human rights important compared to the enjoyment provided by a football match. We also gained insights into the ways in which the World Cup drew attention from individuals with varied levels of interest in football, which is a result that can probably be extrapolated to larger populations.

This method has some limitations, in terms of validity and reliability. In terms of validity, if the questions tried to map out the perceptions of Qatar held by our respondents, the subject is inherently complex and difficult to study. Questions in a questionnaire are unable to capture the full extent of this complexity. In terms of reliability, the sample was not representative, as the respondents had particular socio-economic and educational profiles which do not reflect what would be found in a global, representative sample.

This study does not aim for generality, which reduces the extent to which the lack of reliability is problematic.

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<sup>85</sup> With 51 responses completed at more than 90%.

<sup>86</sup> Respondents were anonymous but described their status at the Institute.

As outlined above, the community of the Institute allowed us to study perceptions in diverse individuals and we considered it to be a suitable method considering the time and resources constraints we faced.

## Annex 2: Background Gulf Nations & Nation Branding

Saudi Arabia, Qatar, and the United Arab Emirates are located in the Arabian/Persian Gulf, a region of the Middle East with North Africa to the west and Iran to the northeast. To contextualize our topic, we hereby present a quick overview of these countries' characteristics, similarities, and differences, as well as the challenges they currently face.

### *Social characteristics and challenges*

- They are Arab and Muslim nations, albeit of different schools (Qatar and Saudi Arabia follow the Wahhabi school, and the UAE is heterogeneous). Saudi Arabia and Qatar are relatively conservative, by Western standards, whilst the emirates within the UAE are diverse, with Dubai being less conservative than the others.
- Demographically, these nations' populations are young, with over 50% of local populations under 25 (International Statistical Institute 2023). In Qatar and the UAE, a significant portion of the population is made of foreign workers (around 90% in both countries). At the same time, youth unemployment for nationals is high and worsening with increasing numbers of young people entering the job market, as public sector jobs are limited and private sector jobs are filled by expatriates (Kabbani & Mimoune 2021).

### *Economic characteristics and challenges*

- Saudi Arabia, Qatar and the UAE have experienced strong growth during the last fifty years. Save for the exception of the Emirate of Dubai within the UAE, most of this economic growth is attributable directly or indirectly to the extraction of natural resources (Kabbani 2021).
- The political economy of these countries is dominated by their governments, whose economic prominence is achieved using natural resources revenues. These natural resource rents are distributed to populations through public benefits and services, attractive public sector jobs, and government contracts. Through government-funded projects, sovereign wealth funds' investments, state-owned enterprises, and clientelism, state-led economic activity constrains the private sector. Dubai, and to a certain extent

the UAE, are exceptions in that they have had more success in encouraging entrepreneurship (Kabbani & Mimoune 2021).

- The overreliance on natural resources was recognized as a threat to these nations' economic development as early as the 1980s, which prompted attempts to diversify. Non-oil/gas sectors have therefore been developed, with varying degrees of success, to diversify these nations' economies (Miller 2016). For instance, if the UAE has been very successful in diversifying into tourism, logistics, finance, and business, Saudi Arabia's and Qatar's initiatives have not been as effective. In 2021, for instance, the hydrocarbon revenues' share as of total revenues was 82% in Qatar, 67% in Saudi Arabia, and 37% in the UAE (with 1% for Dubai) (Kabbani & Mimoune 2021; Roberts 2017).

### Political characteristics and challenges

- Politically, these countries are monarchies. Maintaining the support of their populations and guaranteeing their legitimacy is therefore a crucial concern for the rulers of these countries, especially since the Arab Spring. Sustaining economic growth is one of the main means used by these governments to generate support and loyalty (Miller 2016).
- As young nations, nation-building is a crucial process to generate/maintain popular support, loyalty, national unity, and national identity (Hertog 2016).
- These nations are situated in a geopolitically unstable region. As small countries with limited military capacities, Qatar and the UAE in particular must rely on "soft power"<sup>87</sup> to maintain their security and influence abroad (Miller & Verhoeven 2019), whilst Saudi Arabia is increasingly assertive in trying to recover its role of regional leader<sup>88</sup>.
- Since the 2000s, Gulf countries in general have pursued the ambitions of becoming more important economic and political actors on the global stage, as well as cultural, scientific, and normative leaders (Hertog 2017).

Crucially, this commonality of characteristics and challenges creates competitive pressures between Gulf nations in economic, political, diplomatic, and cultural realms (Gardner 2021). This situation has prompted Gulf nations to recognize nation branding as a powerful strategy to differentiate themselves, as well as attain (geo)political and economic goals.

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<sup>87</sup> "What is soft power? It is the ability to get what you want through attraction rather than coercion or payments. It arises from the attractiveness of a country's culture, political ideals, and policies." Joseph S. Nye Jr., *Soft Power: The Means To Success In World Politics* (2004).

<sup>88</sup> Interview of the authors with Dr. Christian Koch, Director of the Gulf Research Center Foundation.

Economically, it would attract foreign investment, companies, visitors, and workers, whilst increasing the desirability of their exports worldwide.

Politically, it would increase their visibility and highlight their profile as credible, competent members in the region and in the international community (Zeineddine 2017). One of the nation branding tools at their disposal is the hosting of mega-events, which allows hosting countries to communicate their values and achievements to global audiences, challenge preconceptions and negative stereotypes, signal their political preeminence, attract tourists, businesses, and workers. In so doing mega-events have the potential to help Gulf countries diversify their economies and strengthen their political status. Dubai was instrumental in establishing itself as an event destination, and its successes led many other Gulf countries to follow its example<sup>89</sup>. Gulf countries have hosted sports events, for instance with Qatar hosting the 2006 Asian Games and Saudi Arabia hosting the 2018 Race of Champions, as well as MICE (Meetings, Incentives, Conferences, and Exhibitions) with, for instance, Qatar hosting the WTO ministerial conference in 2001 and Dubai hosting the IMF's Board of Governors annual meeting in 2003.

### Annex 3: Background Dubai's strategy and branding

Dubai is the capital city of the Emirate of Dubai, one of the seven emirates forming the United Arab Emirates. The country, founded in 1971, united entities that had previously been British protectorates. Following independence and the discovery of oil, the UAE followed an economic development path that was highly dependent on oil revenues (Miller 2016). The Emirate of Dubai, less endowed in natural resources, used these early oil revenues to pursue diversification strategies (Mishrif & Kapetanovic 2018). In the 1960-70s, the government invested heavily in infrastructure, urban development, financial, commercial, and administrative centers. In 1985, Dubai created its first free economic zone (Jebel Ali Free Zone), of which there are more than twenty today. The emirate also implemented liberal pro-business policies and legislations, such as low tax and customs.

These strategies allowed Dubai to attract foreign direct investment (FDI), foreign companies and workers, transforming the emirate into a trade, services, touristic and financial hub (Hvidt 2009). These developments have turned Dubai's economy into one of the most competitive in the world (Department of Economy and Tourism 2023).

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<sup>89</sup> Interview of the authors with Mr James Dorsey, academic and journalist.

An important component of Dubai's service sector is tourism. In the 1990s, Dubai identified tourism as an economic opportunity and endeavored to become a major international destination.

Initially capitalizing on “a typical product mix of winter sun and sand, the desert, and shopping”, Dubai progressively broadened its offerings (Sutton 2016, 355). With guidance from Dubai's Department of Economy and Tourism, the emirate led coordinated efforts to become a unique destination. For instance, Dubai launched an airline company, Emirates, which facilitated travel to the emirate and strengthened its position as a transit hub. Similarly, the construction of striking architectural projects such as the Burj Khalifa (world's tallest building) or the Dubai Mall (world's largest mall) created attractions that have become icons of the city (Hvidt 2009). The hosting of events also figures prominently in Dubai's destination marketing mix., with more than 125 events a year, attracting over 15'000 visitors (Sutton 2016). Dubai is particularly well positioned in the MICE (Meetings, Incentives, Conventions, Exhibitions) events industry, being ranked as the global leader by the International Congress and Convention Association (Hymers 2022). As a result of these efforts, Dubai is now one of the world's foremost touristic destinations, with far-reaching economic outcomes. In 2019, tourism accounted directly for 5.1% of Dubai's GDP, with a much higher implicit multiplier effect on the overall economy (44% in 2011; see Sutton 2016).

Dubai's economic and touristic developments have been supported by intensive city branding efforts under the aegis of Dubai's Department of Tourism and Commerce Marketing.

DTCM has offices around the world and has an important role in promoting Dubai's image abroad. For instance, in 2010 it launched the “Definitely Dubai” campaign to rejuvenate the emirate's image in the wake of the global economic downturn (Eleftheriou-Smith 2010). Dubai's branding strategy has overall been effective in crafting a unique, differentiating image, positioning Dubai as the “Monaco of the Gulf” (Miller 2016, 134). Dubai's brand platform has emphasized several pillars (Lee & Jain 2009):

- Safety: Dubai has very low levels of crime and political instability.
- Openness and opportunity: Dubai's trade and financial regimes are liberal, open to capital and labor flows. The city is fast-growing, offering attractive investment and work opportunities.
- Tolerance: Dubai is cosmopolitan and welcoming, portraying itself as a “global Arabic city” (Sameh et al. 2018).



- **Luxury:** Dubai has a large offering of luxury hotels and attractions. The city also has numerous luxury shops and malls.
- **Natural beauty:** The sea, the sun and sand are distinctive natural features of Dubai.
- **Centrality:** Dubai is centrally situated between East and West, a notion associated to its long history as a port and merchants' hub (Hafeez et al. 2016).

As a “star in the East” (Balakrishnan 2008), Dubai’s attractions have often been described using superlatives such as “tallest, biggest, richest” (Balakrishnan 2008, 81). The 2008 crisis, however, forced Dubai’s political and economic actors to reconsider this strategy. New touristic products were created such as low-cost packages and ecotourism. More importantly, the overreliance on tourism was recognized as a potential threat, which prompted the development of alternative economic drivers (Keshodkar 2016). It is in the wake of these developments that, in 2016, the emirate’s leadership launched the Dubai Industrial Strategy 2030, expressing the desire to shift to a “knowledge-based economy” (WAM 2016). Alongside new initiatives such as the Dubai 3D Printing Strategy and Dubai Smart City, a new narrative emerged to associate Dubai with innovation, knowledge, and creativity (Althani 2023).

Concurrently to these economic dynamics, Dubai’s geopolitical situation is tied to the UAE’s. As a small country in a politically volatile region, the UAE cannot count on its military capabilities alone to ensure its security (Lootah 2021). Consequently, the country has pursued a soft power strategy to support its status and reputation as a global actor, forming the UAE Soft Power Council in 2017 (The National News 2017). For instance, the country acted as a mediator between Eritrea and Ethiopia in 2018 (Fick & Cornwell 2018). Dubai, as the most well-known emirate of the country, is integral to this soft power strategy. The hosting of international events is but one of the means by which it does so (Antwi-Boateng & Alhashmi 2022).

Expo 2020 Dubai must be situated in this context. From the moment the event was first considered, in 2009, to its eventual opening in 2021, Expo 2020 Dubai was part of a broader strategy aimed at supporting the emirate’s, and the country’s, reputation, economic and geopolitical position.

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