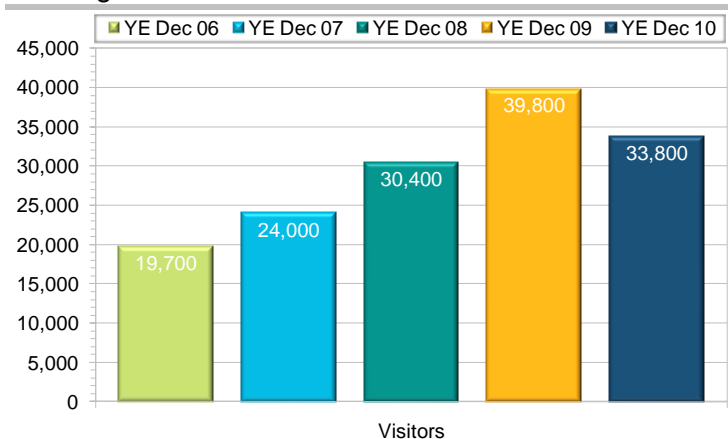




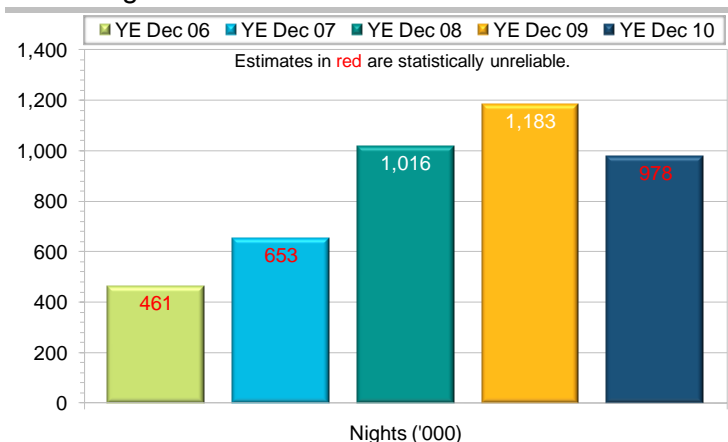
Overnight visitors



NSW received 33,800 overnight visitors from Middle East & North Africa (ME&NA) - down by 15.1% on YE Dec 09. The ME&NA contributed 1.2% of visitors to the State - down by 0.3% points on YE Dec 09.

Note: This market has experienced strong growth in aviation capacity in recent years. While economic growth has slowed due to the GFC, the wealth held in the region continues to support strong demand for Australia.

Visitor nights



Estimates of ME&NA visitor nights in NSW are considered statistically unreliable for three of the five time periods.

Market share

NSW received 37.9% of ME&NA visitors in Australia. Compared to YE Dec 09, the share of visitors was down by 12.1%.

Accommodation

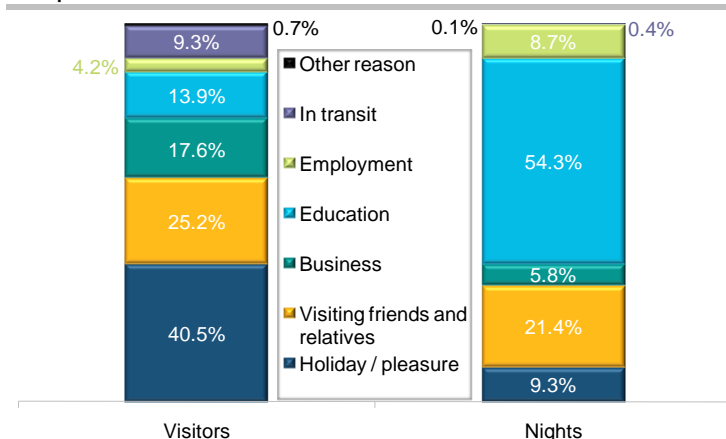
'Rented house / apartment / unit / flat' (37.3%) was the most popular accommodation type used by ME&NA visitors for nights in NSW. 'Home of friend or relative' (27.3%) was the 2nd most popular accommodation used, followed by 'educational institution' (13.4%).

'Holiday / pleasure' visitors from the ME&NA spent more nights in NSW in a 'home of friend or relative' (27.0%) than in any other accommodation. 'Luxury hotel / serviced apartment / resort, 4 or 5 star' (24.0%) was the 2nd most popular accommodation used, followed by 'standard hotel / motel / motor inn, below 4 star' (22.6%).

Middle East and North Africa includes: Algeria, Egypt, Libya, Morocco, Sudan, Tunisia, North Africa (not elsewhere classified), Bahrain, Iran, Iraq, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates, Yemen, and unspecified countries in the Middle East region.

(1) Source: International Visitor Survey, YE Dec 10, Tourism Research Australia (TRA) - unless otherwise indicated

Purpose of visit



'Holiday / pleasure' (40.5%) was the largest purpose for ME&NA visitors to the State. 'Visiting friends and relatives' (25.2%) was the 2nd largest, followed by 'business' (17.6%).

'Education' (54.3%) was the largest purpose in terms of nights by ME&NA visitors in NSW. 'Visiting friends and relatives' (21.4%) was the 2nd largest, followed by 'holiday / pleasure' (9.3%).

Length of stay

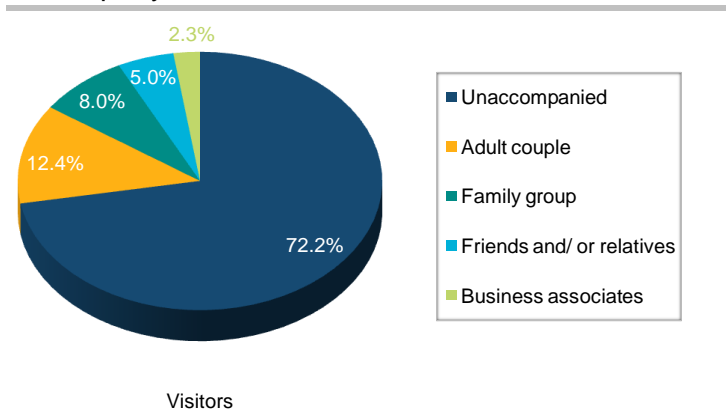
Purpose of visit	Ave length of stay (nights)		Median stay (nights)	
	NSW	Australia	NSW	Australia
Holiday / pleasure	6.7	18.5	5	12
Visiting friends and relatives	24.7	25.7	14	15
Business	9.5	20.0	6	7
Education	112.8	141.3	128	127
Employment	0.0	65.0	3	6
Other reason	1.4	7.7	2	6
Total	28.9	53.3	6	17

Visitors from the ME&NA stayed, on average, 28.9 nights in NSW, while their average stay in Australia was 53.3 nights.

The median length of stay in the State was 6 nights, compared to 17 nights in Australia.

'Holiday / pleasure' visitors from the ME&NA had an average stay of 6.7 nights and a median stay of 5 nights in NSW.

Travel party



'Unaccompanied' (72.2%) was the most common travel party description for ME&NA overnight visitors to the State. 'Adult couple' (12.4%) was the 2nd most common, followed by 'family group' (8.0%).

Middle East & North Africa Market Profile ⁽¹⁾

Year ended December 2010

Visitors to NSW	33,800
Nights in NSW (million)	10
Expenditure in NSW (million)	\$ 114
Expenditure per visitor in NSW	\$ 3,382

Top 5 places visited in NSW

No.	Region	% of visitors to NSW
1	Sydney	86.8%
2	The Hunter	9.3%
3	Illawarra sub-region	3.4%
4	Northern Rivers	3.4%
5	Mid North Coast	3.0%

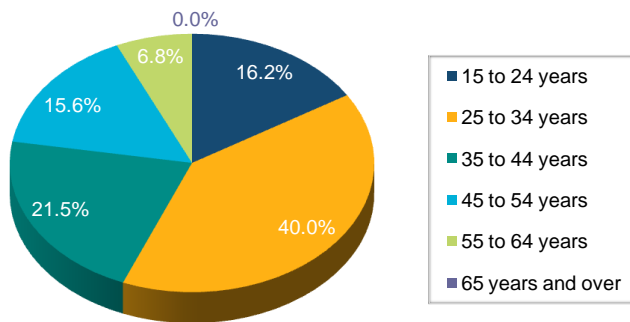
'Sydney' (86.8%) was by far the most visited region in NSW by ME&NA overnight visitors. 'The Hunter' (9.3%) was the 2nd most visited region, followed by 'Illawarra sub-region' (3.4%) and 'Northern Rivers' (3.4%).

ME&NA overnight visitors to Australia: 'Melbourne' (35.8%) was the most visited region, followed by 'Sydney' (32.9%) and 'Brisbane' (18.0%).

Gender

A larger proportion of ME&NA overnight visitors to the State were male (70.1%) than female (29.9%).

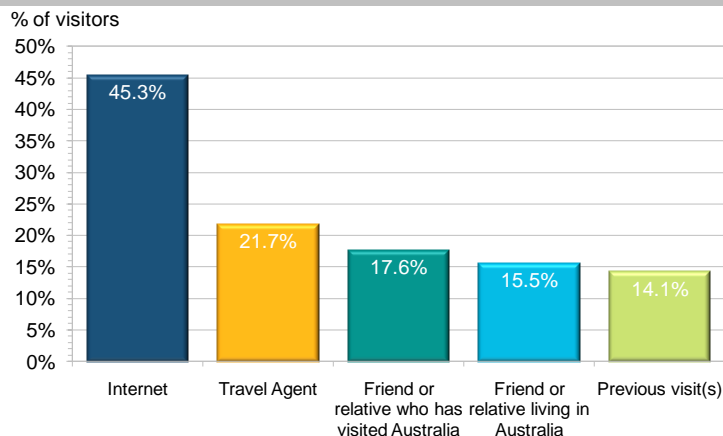
Age



Visitors

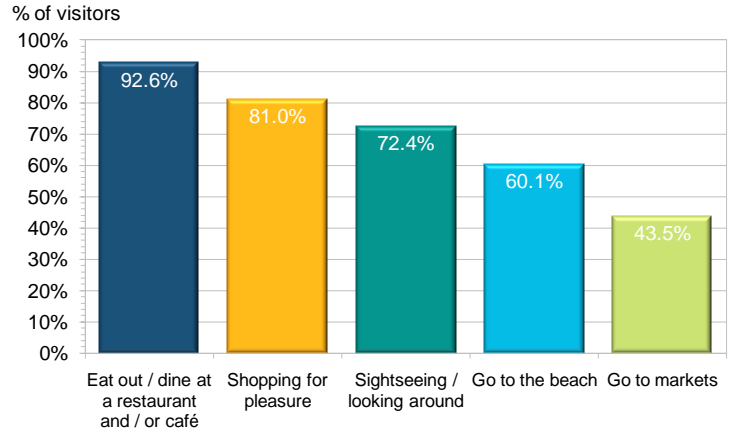
'25 to 34 years' (40.0%) was the biggest age group of ME&NA overnight visitors to NSW, followed by '35 to 44 years' (21.5%) and '15 to 24 years' (16.2%).

Top 5 information sources



The 'internet' (45.3%) was the most popular information source for the trip to Australia by ME&NA overnight visitors who had been to NSW. 'Travel agent' (21.7%) was the 2nd most popular, followed by 'friend or relative who has visited Australia' (17.6%) and 'friend or relative living in Australia' (15.5%).

Top 5 activities in Australia



'Eat out / dine at a restaurant and / or cafe' (92.6%) was the most popular activity undertaken during the trip to Australia by ME&NA overnight visitors who had been to NSW. 'Shopping for pleasure' (81.0%) was the 2nd most popular activity.

Transport

'Taxi or chauffeur driven hire car' (33.9%) was the most common transport used to destinations in NSW by ME&NA overnight visitors. 'Private or company car' (30.6%) was the 2nd most common, followed by 'aircraft' (22.6%).

First time or repeat visit

Most ME&NA overnight visitors who had been to NSW (52.9%) were visiting Australia for the first time.

Travel package

Over 1/20 (5.4%) of ME&NA overnight visitors who had been to the State, arrived in Australia on a travel package. 'All accommodation' (66.7%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'most meals within Australia' (53.3%).

Group tours

The rate of group tour travel to Australia, amongst ME&NA overnight visitors who had been to NSW, was 1.5%.

Expenditure ⁽²⁾

Destination	Total (\$ million)	Per visitor \$	Per night \$
New South Wales	\$114	\$3,382	\$117
Australia	\$555	\$6,231	\$117

ME&NA overnight visitors spent \$114 million in NSW. In total, they spent \$555 million in Australia.

On average, visitors from the ME&NA spent \$3,382 per visitor and \$117 per night in NSW.

(2) Excluding package tours and prepaid international airfares.

Forecast ⁽³⁾

ME&NA visitors to Australia are expected to increase from 105,000* in 2009 to 310,000* in 2020, an average annual growth rate of 10.4%.

(3) Source: Forecast 2010 Issue 2, Tourism Forecasting Committee
* Includes children less than 15 years