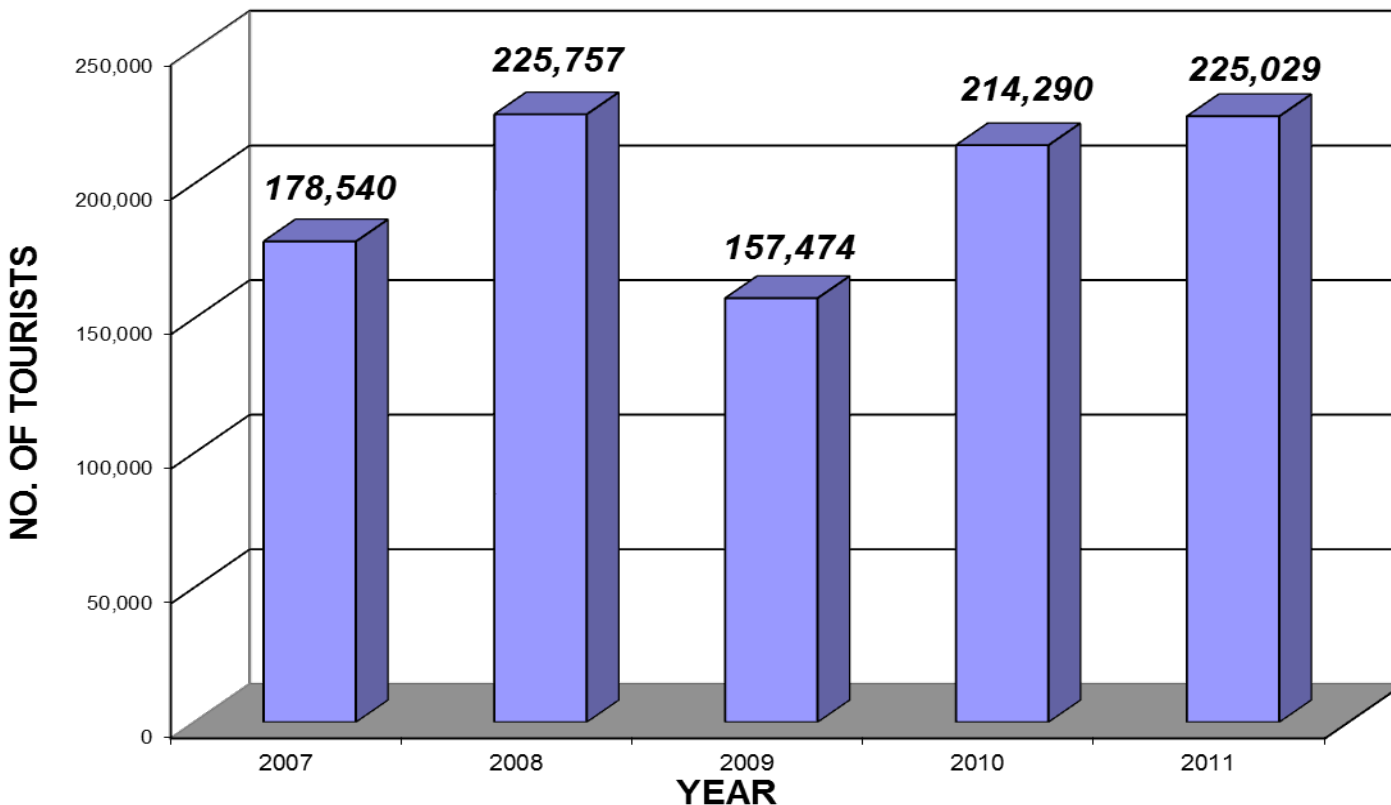


BRUNEI DARUSSALAM VOLUNTARY REPORTS

TOTAL FOREIGN TOURIST ARRIVALS FOR 2007-2011



- For the period of 2007-2011, the highest volume of arrivals was recorded in 2008 summing up to 225,757 while the lowest was recorded in 2009 having a volume of 157,474 arrivals.

* Tourist Arrivals for 2011 (Jan- Nov)

2007 - 2011 TOTAL FOREIGN TOURIST ARRIVALS AT BRUNEI INTERNATIONAL AIRPORT BY MARKET AREAS

| MARKET AREAS | 2007 | 2008 | 2009 | 2010 | 2011 |
|----------------------------|----------------|----------------|----------------|----------------|----------------|
| ASEAN | | | | | |
| MALAYSIA | 44,906 | 47,488 | 38,193 | 54,127 | 56,450 |
| SINGAPORE | 14,173 | 14,867 | 14,221 | 15,973 | 14,797 |
| THAILAND | 4,773 | 4,434 | 3,390 | 4,589 | 4,336 |
| INDONESIA | 10,520 | 14,145 | 8,576 | 16,343 | 18,552 |
| PHILIPPINES | 8,306 | 13,704 | 11,013 | 14,720 | 15,366 |
| VIETNAM | 1,445 | 2,519 | 1,848 | 3,301 | 2,945 |
| SUB-TOTAL | 84,123 | 97,157 | 77,241 | 109,053 | 112,446 |
| % OF GRAND TOTAL | 47.12% | 43.04% | 49.05% | 50.89% | 50.54% |
| FAR EAST | | | | | |
| CHINA (PRC) | 28,252 | 27,652 | 15,800 | 24,579 | 30,610 |
| HONG KONG | 1,706 | 1,782 | 1,197 | 1,210 | 1,099 |
| JAPAN | 4,154 | 4,489 | 3,549 | 3,637 | 3,777 |
| KOREA | 3,810 | 17,548 | 1,604 | 1,712 | 1,521 |
| TAIWAN | 1,838 | 1,806 | 1,487 | 1,917 | 1,361 |
| SUB-TOTAL | 39,760 | 53,277 | 23,637 | 33,055 | 38,368 |
| % OF GRAND TOTAL | 22.27% | 23.60% | 15.01% | 15.43% | 17.24% |
| AUSTRALIA / NZ | | | | | |
| AUSTRALIA | 14,616 | 25,732 | 13,824 | 17,237 | 17,181 |
| NEW ZEALAND | 5,461 | 9,427 | 8,236 | 10,324 | 10,138 |
| SUB-TOTAL | 20,077 | 35,159 | 22,060 | 27,561 | 27,319 |
| % OF GRAND TOTAL | 11.25% | 15.57% | 14.01% | 12.86% | 12.28% |
| LONG HAUL | | | | | |
| UK / IRELAND | 13,206 | 16,619 | 14,708 | 17,795 | 17,516 |
| WESTERN EUROPE | 6,903 | 6,955 | 6,140 | 7,461 | 5,627 |
| EASTERN EUROPE | 662 | 593 | 705 | 979 | 918 |
| NORTH AMERICA | 5,116 | 5,652 | 5,108 | 5,953 | 6,110 |
| MIDDLE EAST | 573 | 884 | 711 | 1,349 | 1,416 |
| SUB-TOTAL | 26,460 | 30,703 | 27,372 | 33,759 | 31,587 |
| % OF GRAND TOTAL | 14.82% | 13.60% | 17.38% | 15.75% | 14.20% |
| TOTAL | 170,420 | 216,296 | 150,310 | 203,428 | 209,720 |
| % OF GRAND TOTAL | 95.45% | 95.81% | 95.45% | 94.93% | 94.26% |
| Non-market specific | 8,120 | 9,461 | 7,164 | 10,862 | 12,778 |
| GRAND TOTAL | 178,540 | 225,757 | 157,474 | 214,290 | 222,498 |

* Tourist Arrivals for 2011 (Jan- Nov)

TOURIST ARRIVAL FROM ASEAN COUNTRIES TO BRUNEI DARUSSALAM (2007 - 2011)

| | COUNTRY | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|--------------------|---------------|---------------|---------------|----------------|----------------|
| 1 | MALAYSIA | 44,906 | 47,488 | 38,193 | 54,127 | 56,450 |
| 2 | SINGAPORE | 14,173 | 14,867 | 14,221 | 15,973 | 14,797 |
| 3 | INDONESIA | 10,520 | 14,145 | 8,576 | 16,343 | 18,552 |
| 4 | PHILIPPINES | 8,306 | 13,704 | 11,013 | 14,720 | 15,366 |
| 5 | THAILAND | 4,773 | 4,434 | 3,390 | 4,589 | 4,336 |
| 6 | VIETNAM | 1,445 | 2,519 | 1,848 | 3,301 | 2,945 |
| 7 | MYANMAR | 311 | 554 | 300 | 529 | 478 |
| 8 | CAMBODIA | 105 | 222 | 133 | 251 | 224 |
| 9 | LAOS | 93 | 106 | 44 | 106 | 114 |
| | GRAND TOTAL | 84,632 | 98,039 | 77,718 | 109,939 | 113,262 |

- The highest arrival from ASEAN was in 2011 with 113,262 tourists followed by 2010. Malaysia recorded the highest arrival to Brunei Darussalam for the period of 2007-2011.

* Tourist Arrivals for 2011 (Jan- Nov)

CHINA, KOREA , JAPAN,INDIA AND RUSSIA TOURIST ARRIVALS 2007-2011

| | COUNTRY | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|-------------------|--------|--------|--------|--------|--------|
| 1 | CHINA | 28,252 | 27,652 | 15,800 | 24,579 | 28,238 |
| 2 | KOREA | 3,810 | 17,548 | 1,604 | 1,712 | 1,392 |
| 3 | JAPAN | 4,154 | 4,489 | 3,549 | 3,637 | 3,409 |
| 4 | HONGKONG | 1,706 | 1,782 | 1,197 | 1,210 | 1,028 |
| 5 | INDIA | 3402 | 3540 | 2879 | 4904 | 3841 |
| 6 | RUSSIAN FEDRATION | 315 | 290 | 195 | 387 | 398 |

* Tourist Arrivals for 2011 (Jan- Nov)

TOP 10 TOURIST ARRIVALS BY COUNTRY 2007-2011

| COUNTRY | 2007 | 2008 | 2009 | 2010 | 2011 |
|----------------|--------|--------|--------|--------|--------|
| MALAYSIA | 44,906 | 47,488 | 38,193 | 54,127 | 56,450 |
| CHINA | 28,252 | 27,652 | 15,800 | 24,579 | 30,610 |
| AUSTRALIA | 14,616 | 25,732 | 13,824 | 17,237 | 17,181 |
| UNITED KINGDOM | 12,926 | 16,548 | 14,386 | 17,416 | 15,630 |
| SINGAPORE | 14,173 | 14,867 | 14,221 | 15,973 | 14,797 |
| INDONESIA | 10,520 | 14,145 | 8,576 | 16,343 | 18,552 |
| PHILIPPINES | 8,306 | 13,704 | 11,013 | 14,720 | 15,366 |
| NEW ZEALAND | 5,461 | 9,427 | 8,236 | 10,324 | 10,138 |
| THAILAND | 4,773 | 4,434 | 3,390 | 4,589 | 4,336 |
| JAPAN | 4,154 | 4,489 | 3,549 | 3,637 | 3,777 |

* Tourist Arrivals for 2011 (Jan- Nov)

TOP 10 TOURIST ARRIVALS BY COUNTRY FOR 2007-2011

- For the period of 2007-2011, most tourist arrivals to Brunei are for business or visiting friends and relatives purposes and 44% of tourist arrivals stated for holiday purpose. According to industry sources, this is the fastest growing segment among all arrivals, and the one presenting the best potential for future growth.
- To achieve this growth, Brunei Tourism is engaging in a number of marketing initiatives, often in cooperation with the national airline and private sectors and appointment of marketing representatives at key source markets in the Far East, Australasia and Western Europe.
- Through presence in trade fairs, advertisement in targeted media, hosting of familiarization tours for trade and media, support of industry partners and participants in road shows and trade missions, Brunei Tourism is able to carry its message to consumers, media and travel industry across a number of key markets, resulting in growth in awareness and interest from these areas.
- In 2009, due to the influence H1N1 and global economics crisis, Brunei Tourism had decline in inbound tourism markets.
- From 2007-2011, the rank for the first to the third place remain the same for Malaysia, China and Australia. United Kingdom is on the fourth spot with 87,572 visitors.

TOP 10 TOURISTS ARRIVAL ON HOLIDAY 2007-2011

- China ranks the highest in term of holidaymakers in Brunei in the last 5 years that is 98,753 (11%) followed by Malaysia 52,976 (5.9%) and Australia 33,618 (3.75%).

VISITOR ARRIVALS STAYING IN HOTEL FOR 2007-2011

- Staying in hotel are the most popular for the tourists to come to Brunei:

Year

2007: 109,147 (61.1%)

2008: 148,970 (66%)

2009: 101,897 (64.7%)

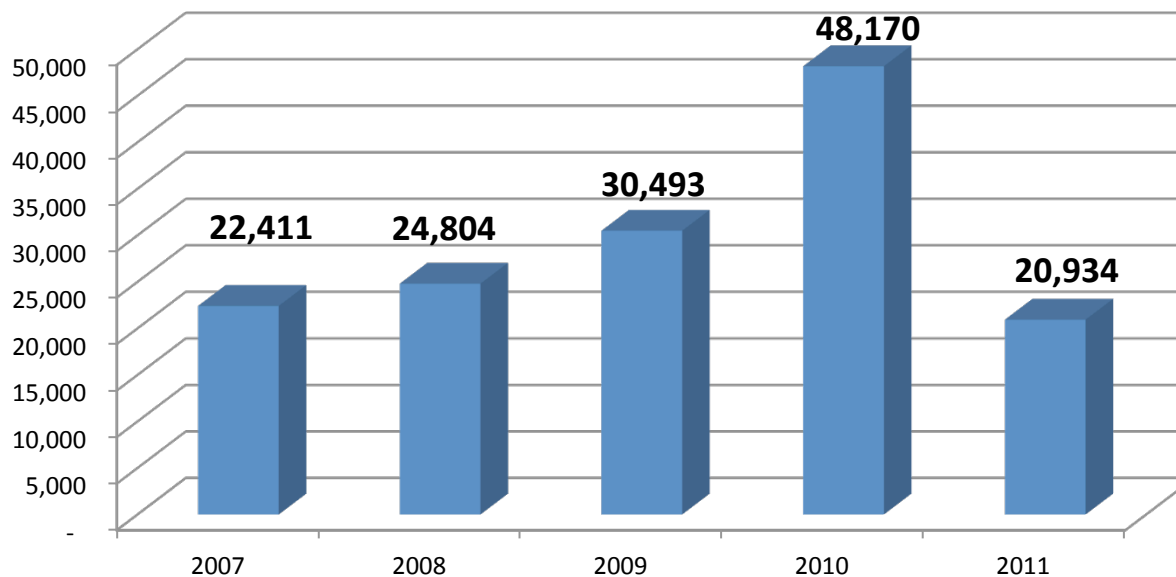
2010: 137,392 (64.1%)

2011: 72,185 (59.58%)

* 2011 (Jan- June)

CRUISE SHIPS STATISTIC 2007-2011

| YEAR | 2007 | 2008 | 2009 | 2010 | 2011 |
|--------------------|---------------|---------------|---------------|---------------|---------------|
| NO OF CRUISE SHIPS | 24 | 21 | 24 | 34 | 19 |
| NO OF PASSENGERS | 13,879 | 16,814 | 20,599 | 33,860 | 15,197 |
| NO OF CREW | 8,532 | 7,990 | 9,894 | 14,310 | 5737 |
| TOTAL | 22,411 | 24,804 | 30,493 | 48,170 | 20,934 |



2011 PERFORMANCE REPORT

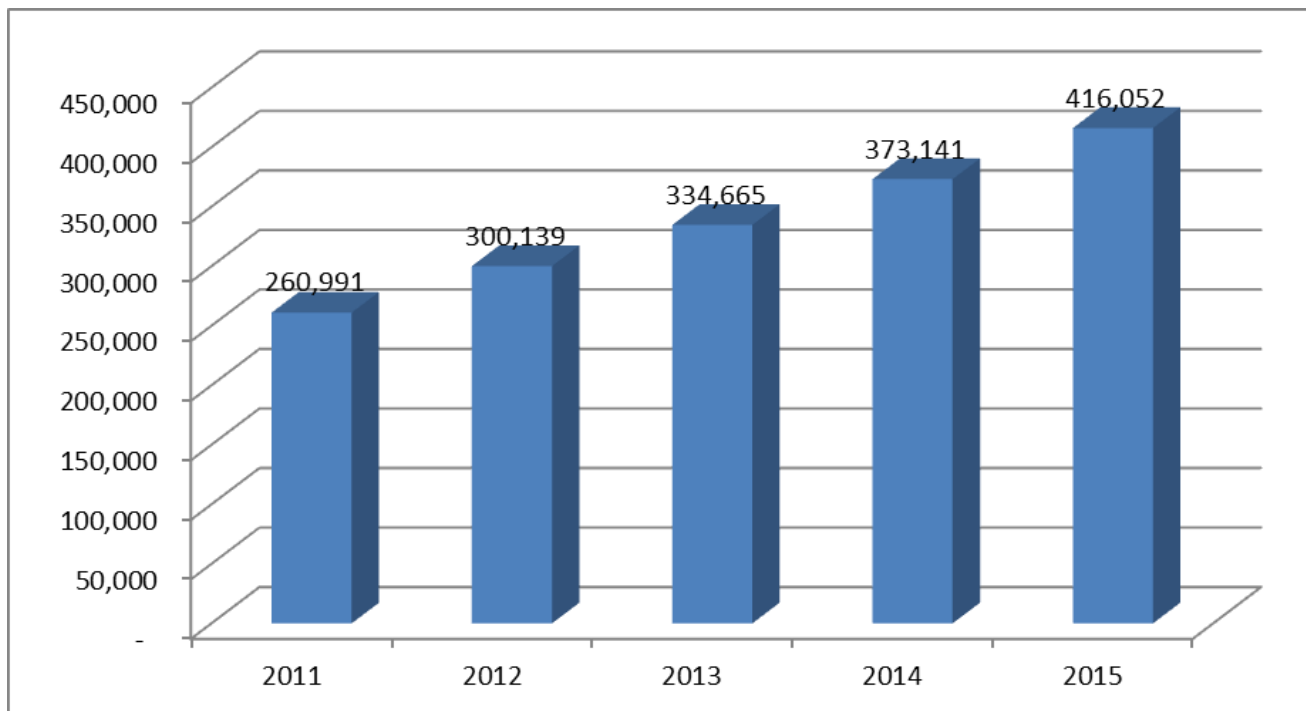
Performance :

- Tourist Arrivals at LTAB Jan – Nov = 222,498
- Projected 2011 arrivals at LTAB = 260,911
- Cruise ship arrivals = 19 Calls / 20,934 passengers
- Average length of stay (est.) = 3.5 days
- Average expenditure per tourist (est.) = BND741.00
- Direct tourism revenue in 2011 (est.) = BND193.4M (excluding airfares)
- Tourism % of GDP in 2011 (est.) = 1%
- Tourism % of Services sector GDP in 2011 (est.) = 3.5%
- Direct tourism employment (est.) = 5,200+ jobs

Sources : Immigration Department, Tourism Development Department and Economic Planning and Development Department (2011 figures at current at current prices, estimates based on Q1 and Q3 figures)

PROJECTED TOURISTS ARRIVAL 2011 -2015

| YEAR | 2011 | 2012 | 2013 | 2014 | 2015 |
|----------------|---------|---------|---------|---------|---------|
| NO OF TOURISTS | 260,991 | 300,139 | 334,665 | 373,141 | 416,052 |



2012 PROJECTION

Performance targets:

Projected actual 2012 arrivals at LTAB = 300,139 (15%)

Direct target tourism revenue in 2012 = BND 222.4M (excluding airfares)

Cruise Ships arrival 2012 = 13 calls / 26,541 passengers *

Cruise Ships arrival 2013 = 6 calls/16,176 passengers *

* confirmed number