



Tourism Industry 2018: Towards Brunei Wawasan 2035

Tourism Development Department

Ministry of Primary Resources And Tourism



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BRUNEI

STRATEGY

MISSION

PLANNING

DIRECTION

VISION



STRATEGIC PLANNING

2016-2020

Vision

Towards a sustainable growth and increase in the number of tourists that would contribute significantly to the growth of economic activities which is related to tourism.

Mission

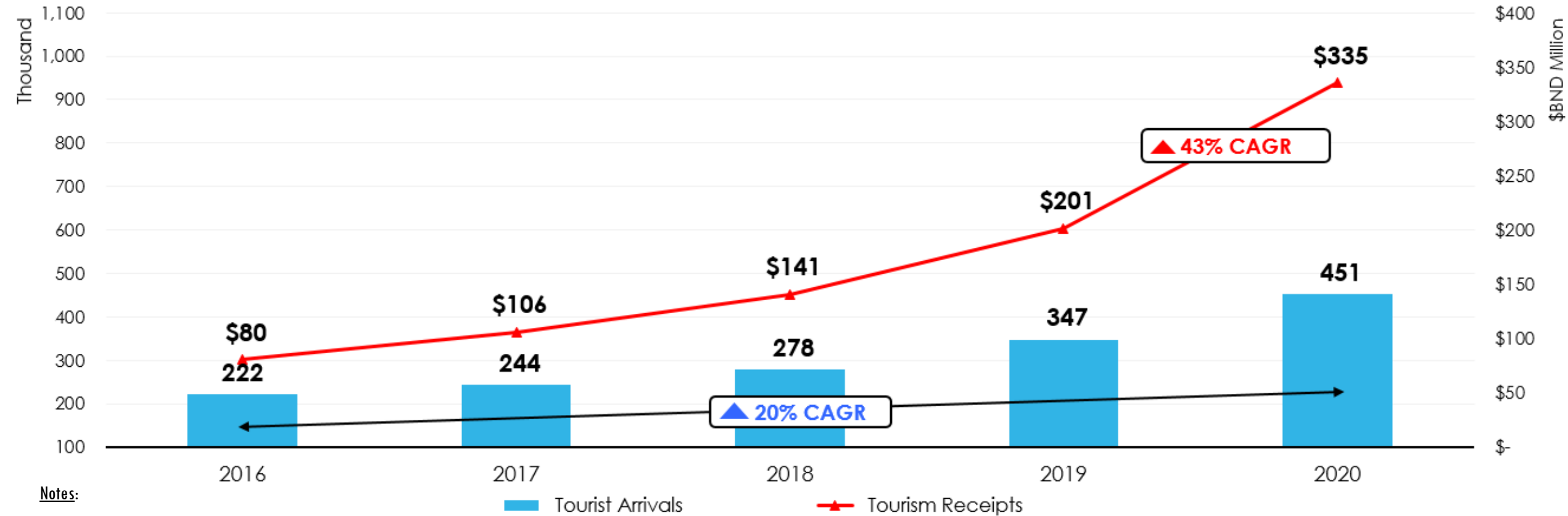
To increase growth in the number of tourists by focusing on strengthening the attractiveness and diversity of tourism products and improve the quality of tourism services.

1. Double the number of tourist arrivals by air (From 218,000 tourists in 2015 to 450,000 tourists by 2020) through effective transport connectivity, marketing & promotion and continuous cooperation with the stakeholders to contribute significantly to the Gross Domestic Product (GDP) of Brunei Darussalam;
2. Strengthen and ensure the sustainability of existing tourism products as well as developing more quality tourism offerings with focus on:
 - 2.1 Primary products such as "Temburong, Kampong Ayer and Bandar Seri Begawan" as well as "Belait" and "Tutong", as the main tourist attraction within the region and internationally;
 - 2.2 Emerging products that are exciting and have potential as tourist destinations such as Beaches and Recreation Parks; and
 - 2.3 Activity-based products such as bird watching, Islamic tourism, medical tourism, diving, cruise tourism, sports & adventure tourism, gastronomy tourism, education tourism, MICE (Meetings, Incentives, Conventions & Exhibitions/ Events), homestay, culture and community-based tourism;
3. Attracting foreign investment and diversify tourism products and services as well as to increase marketing and promotion through Public-Private Partnership and alternative financing to help reduce the burden of Government's spending.
4. Grow the travel, tourism and hospitality industry and related services providers to achieve international recognition and competitiveness through:
 - 4.1 Improving the quality of tourism facilities which provide comfort and safety to visitors; and
 - 4.2 Ensuring the quality of services provided by developing the capacity and competency of manpower



- ❑ Tourism products that can still be improved;
- ❑ Tourism Services and Hospitality level that can still be improved;
- ❑ Brunei's high currency compared to other neighboring countries;
- ❑ High competition with other tourism destinations especially the well-established ones such as Indonesia (Bali), Thailand (Phuket), Malaysia (Langkawi), Singapura dan lain-lain; and
- ❑ The usual holiday trends from the local residents who are used to travel outside Brunei during school holidays.

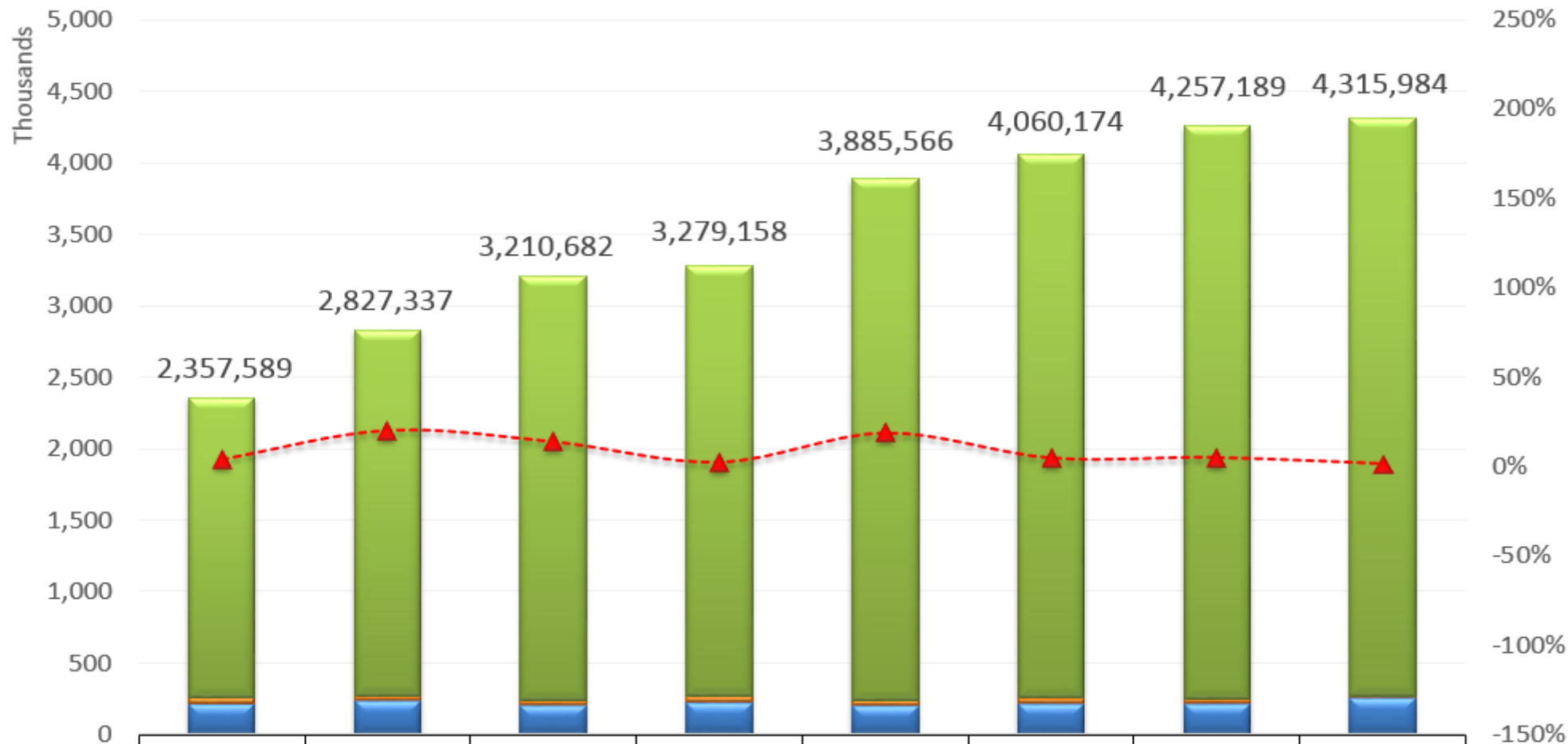
In the next 5 years, International Tourist Arrivals by air will increase at a CAGR of 20%





TOURISM PERFORMANCE 2017

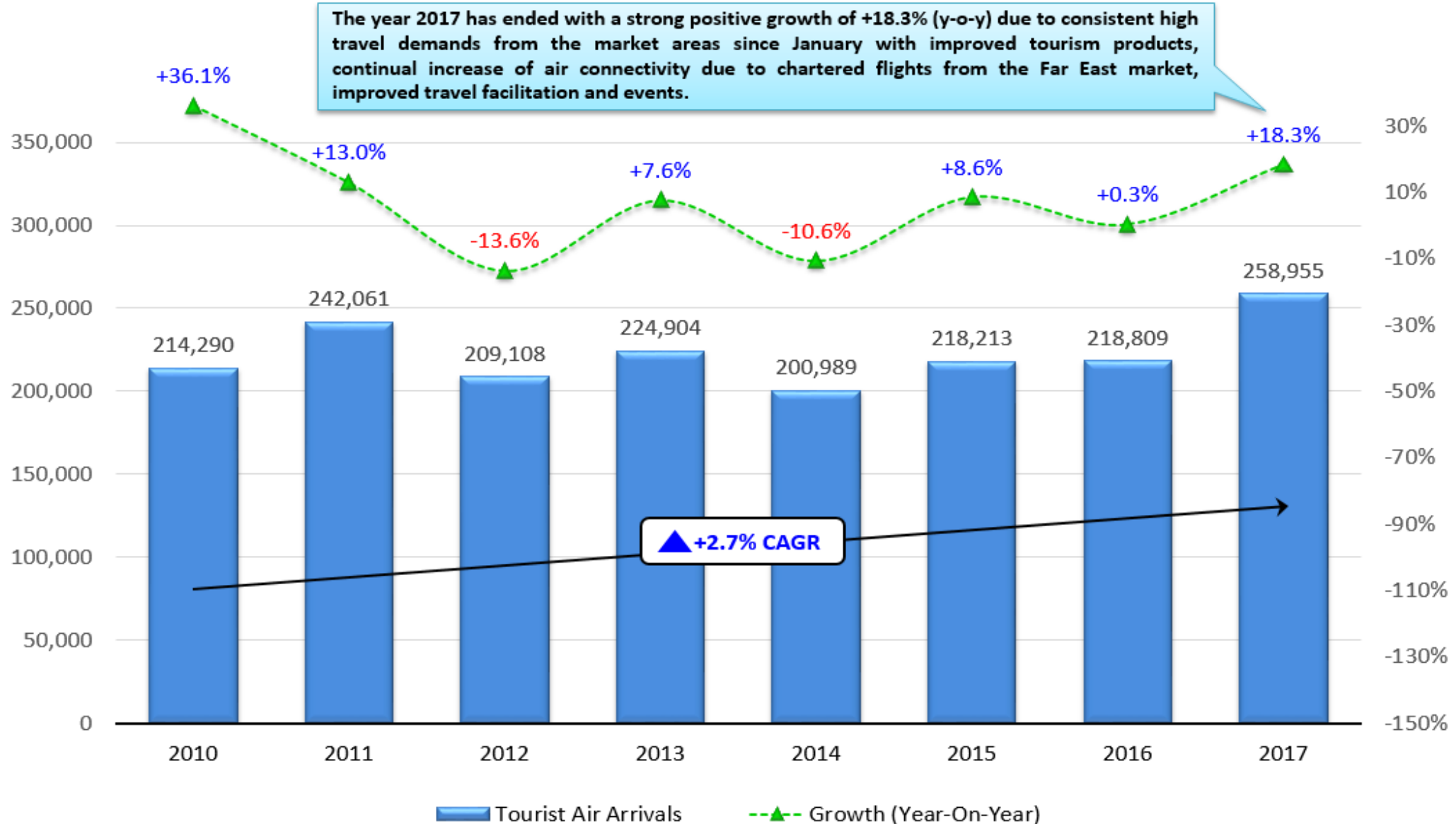
International Visitor Arrivals to Brunei, 2010-2017



	2010	2011	2012	2013	2014	2015	2016	2017
BORDER	2,095,129	2,558,336	2,973,672	3,011,038	3,645,531	3,806,272	4,013,325	4,046,143
CRUISE	48,170	26,940	27,902	43,216	39,046	35,689	25,055	10,886
AIR	214,290	242,061	209,108	224,904	200,989	218,213	218,809	258,955
Growth (Y-O-Y)	+3.7%	+19.9%	+13.6%	+2.1%	+18.5%	+4.5%	+4.9%	+1.4%

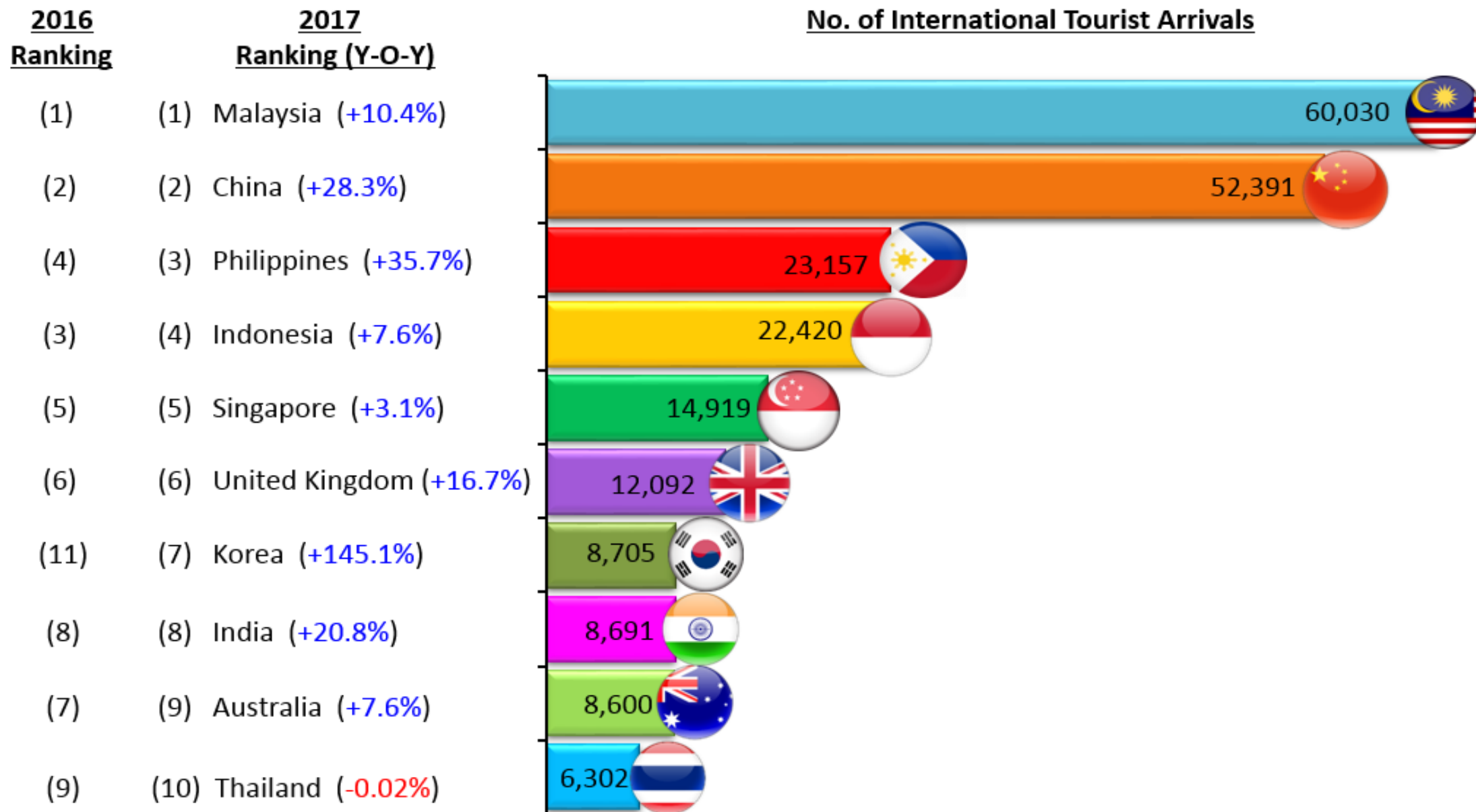
Over the past 8 years (2010-2017) visitor arrivals have shown a Compound Annual Growth Rate (CAGR) of +2.7% by air, -19.1% by cruise and +9.9% by border.

International Tourist Arrivals to Brunei by Air, 2010-2017

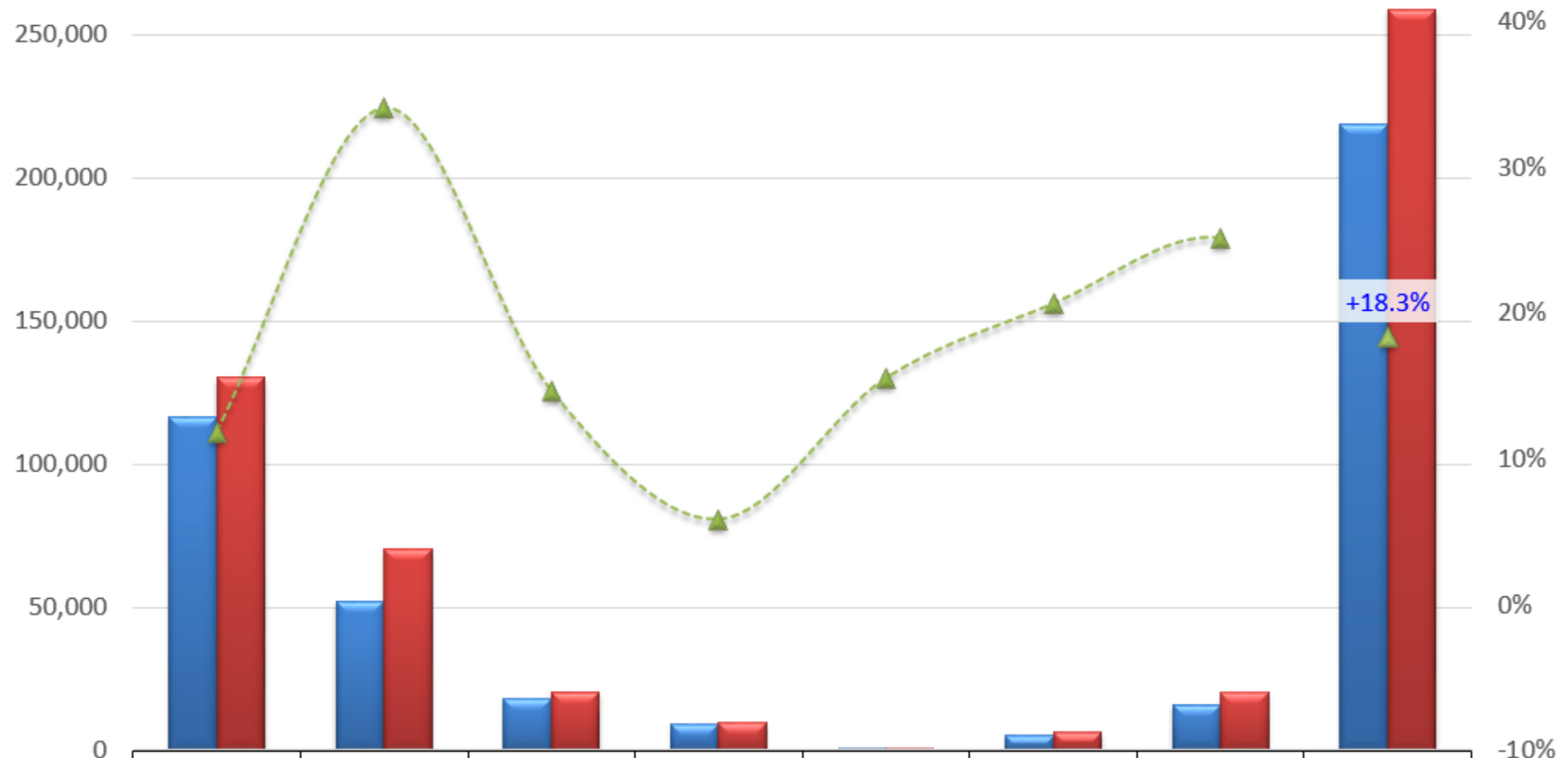


Over the past 8 years (2010-2017), visitor arrivals by air have shown a Compound Annual Growth Rate (CAGR) of +2.7%.

International Tourist Air Arrivals from Top 10 Countries, 2017

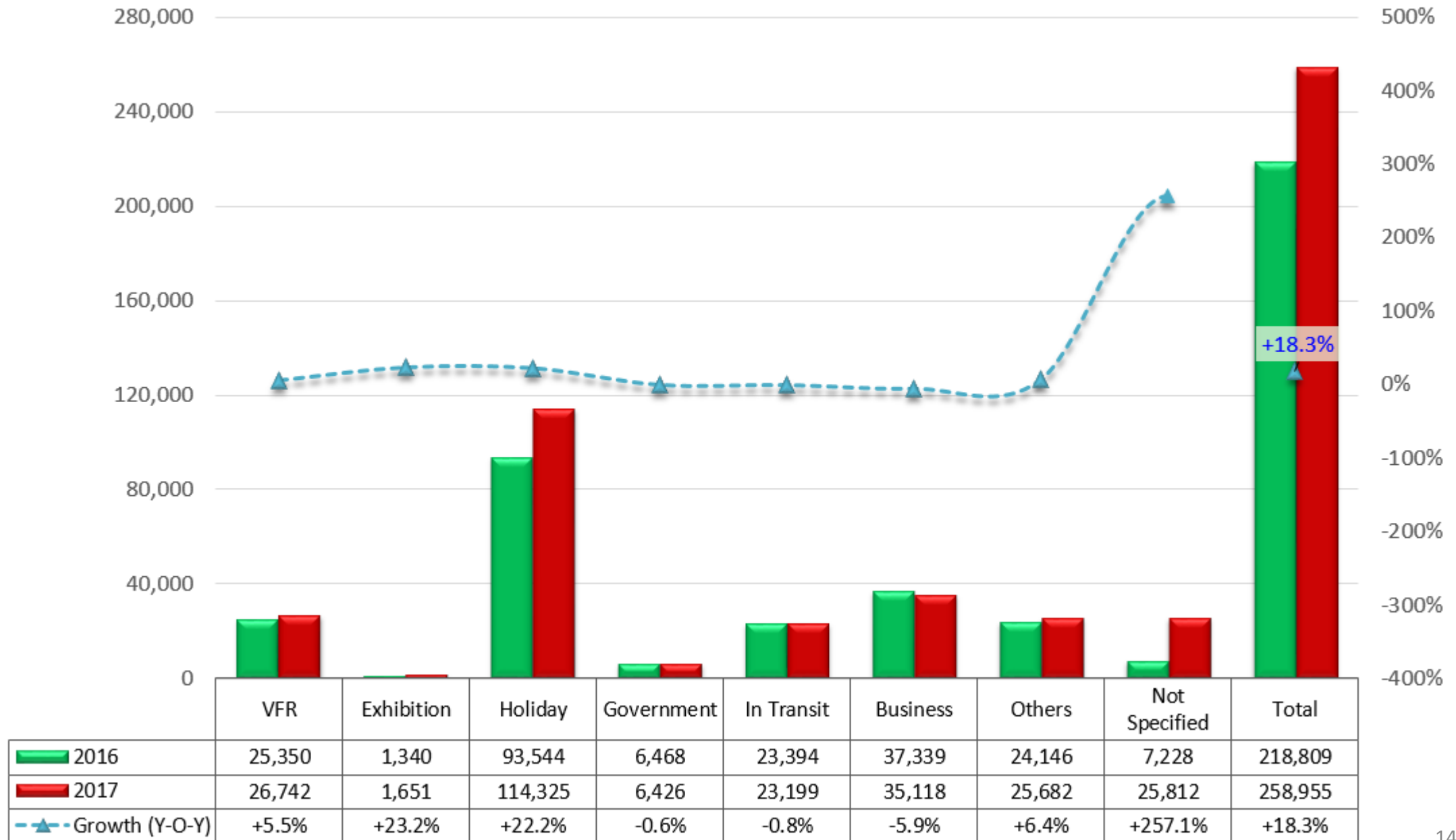


International Tourist Air Arrivals by Region, 2016 & 2017



	ASEAN	Far East	Europe	AUS/NZ	Middle/West /Central Asia	Americas	Others	Total
2016	116,419	52,373	18,059	9,443	819	5,421	16,275	218,809
2017	130,208	70,193	20,708	9,994	946	6,538	20,368	258,955
Growth (Y-O-Y)	+11.8%	+34.0%	+14.7%	+5.8%	+15.5%	+20.6%	+25.1%	+18.3%

International Tourist Air Arrivals by Purpose of Visits, 2016 & 2017



Accommodation, 2012-2017

	2012	2013	2014	2015	2016	2017
Total No. of Accommodation	47	54	69	74	83	87
Total No. of Rooms	3,143	3,364	3,678	3,680	4,311	4,455
Total No. of Beds	4,207	4,648	5,107	5,297	6,044	6,226
a) No. of Hotels, Resort & Apartments	35	40	44	46	50	52
No. of Rooms	3,011	3,224	3,500	3,467	4,011	4,142
No. of Beds	3,870	4,261	4,653	4,791	5,415	5,555
b) No. of Guesthouses & Lodging	7	8	9	12	14	16
No. of Rooms	87	92	111	143	169	183
No. of Beds	190	230	233	275	314	335
c) No. of Government Guesthouses	2	2	2	2	2	3
No. of Rooms	28	28	28	28	28	30
No. of Beds	104	104	104	104	104	130
d) No. of Homestays	3	4	14	14	17	16
No. of Rooms	17	20	39	42	103	100
No. of Beds	43	53	117	127	211	206

Length of Stay and Occupancy Rate, 2012-2017

Accommodation Indicators	2012	2013	2014	2015	2016	2017
Average Length of Stay ¹	2.3 days	2.5 days	2.3 days	2.2 days	2.2 days	2.2 days
Average Occupancy Rate ² (AOR)	45.5%	49.1%	40.3%	37.9%	38.7%	37.2%

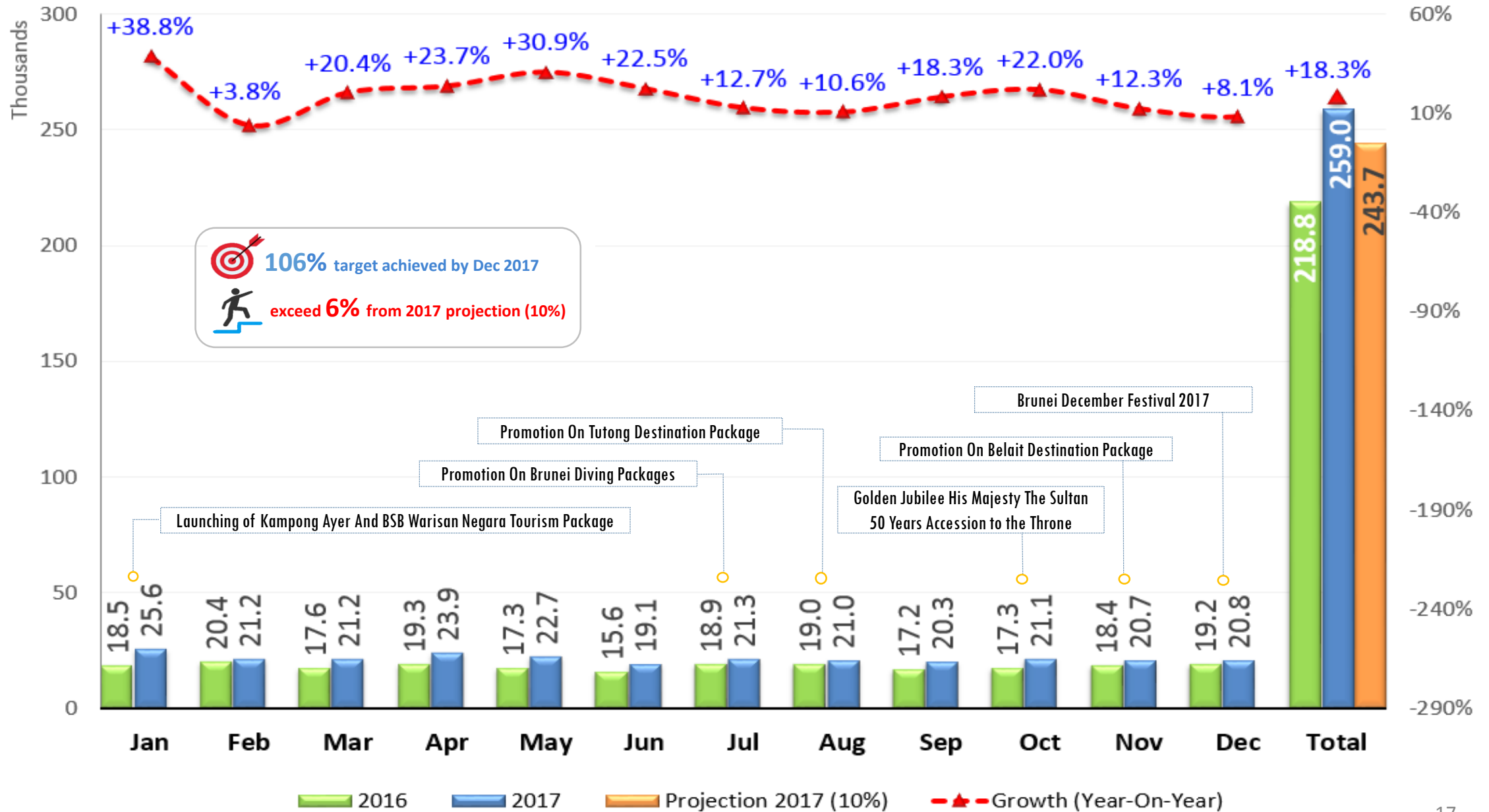
Note:

¹ Based on Hotels and Air Arrivals only

² 2012 – Based on 13 accommodations only
 2013 – Based on 11 accommodations only
 2014 – Based on 13 accommodations only
 2015 – Based on 33 accommodations only
 2016 – Based on 22 accommodations only
 2017 – Based on 24 accommodations only

Performance	2016	2017	Growth (Y-O-Y)
Average Occupancy Rate from 19 Apartments & Hotels only	39.3%	41.2%	+4.8%
Top 5 Contributors	64.3%	64.2%	-0.2%

International Tourist Air Arrivals by Monthly Trend and Target, 2016 & 2017



2017

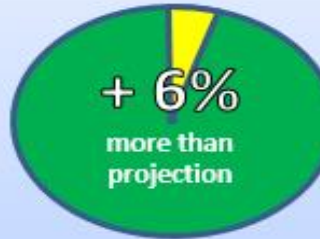
10%

year-on-year to reach



Tourist Air Arrivals

244,000 Estimated



Achievement on Tourist Air Arrivals:
258,955 of 244,000 (106%)
(Jan-Dec 2017)



Tourism Receipts

B\$106m Estimated



Achievement on Tourism Receipts:
B\$83m of B\$106m (78%)
(Jan-Dec 2017)

2018

14%

year-on-year to reach



Tourist Air Arrivals

278,000 Estimated



Tourism Receipts

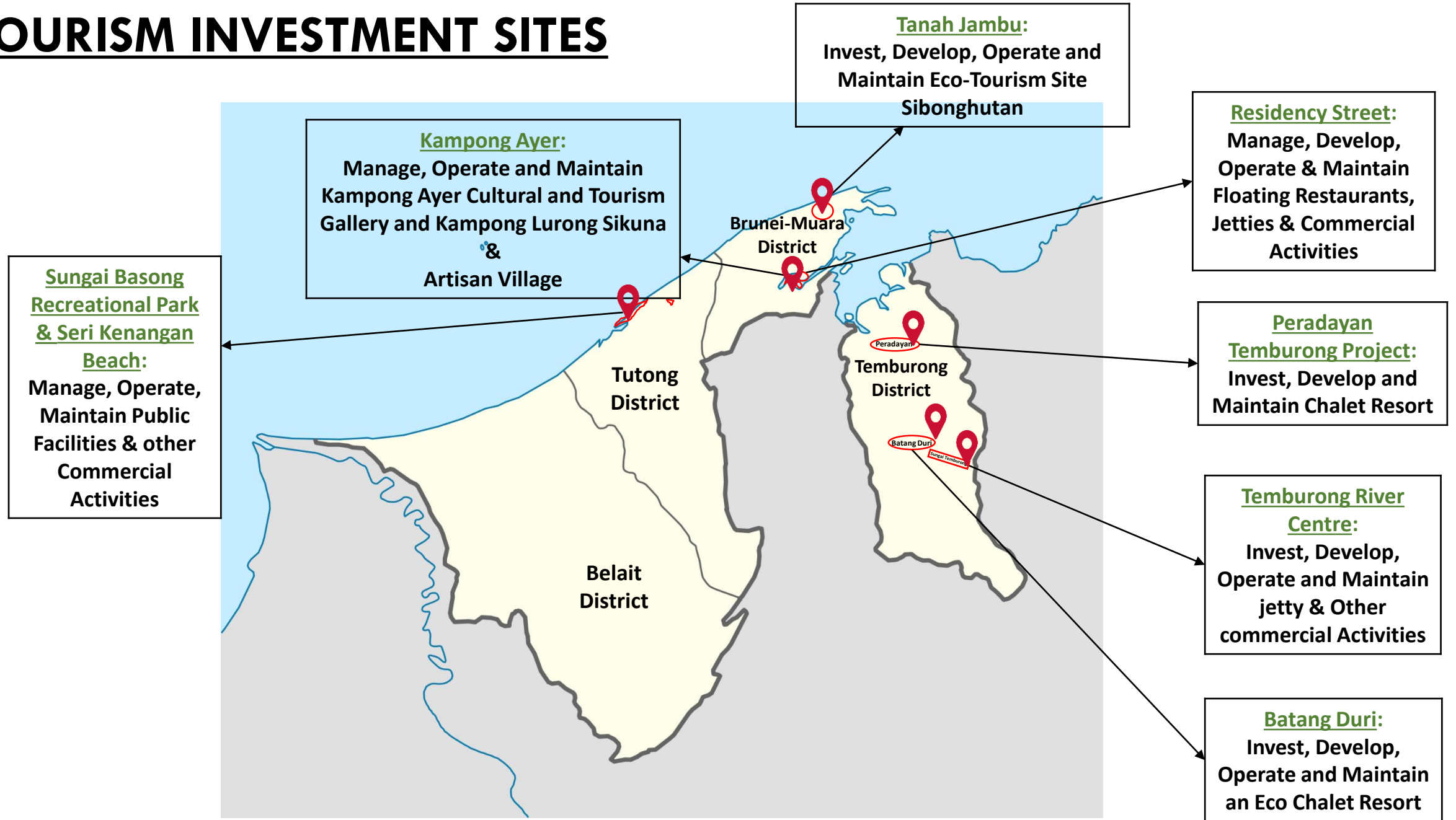
B\$141m Estimated



TOURISM INVESTMENT SITES



TOURISM INVESTMENT SITES

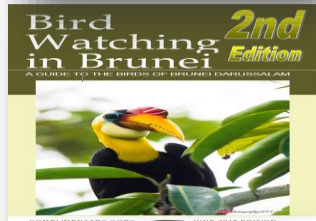


TOURISM ACHIEVEMENTS 2016/ 2017



Tourism Achievements for 2016

1. Homestay ASEAN Award: Awarded to the Seri Tanjung Homestay, Kampong Lubok Batu and Sungai Bunga Emas, Kampong Sibut, Temburong: 22th January 2016;
2. ASEAN Green Hotel Award: Awarded to the Ulu-Ulu Resort: 22th January 2016;
3. Visa Facilitation (People's Republic of China): May 2016;
4. Booklet on “2nd Edition of Bird Watching in Brunei Darussalam“: Launched on the 2nd August 2016;
5. Training for Tourist Guides (Bridging Course): 29th August 2016;
6. Launching of the Temburong Destination Holiday Packages: 1st September 2016;
7. Basic Training Guide: 1st October 2016;
8. The Establishment of the Brunei Tourism Board (BTB): 30th November 2016; and
9. Tourist Information at the Brunei International Airport.



Tourism Achievements for 2017

1. Launching of Bandar Seri Begawan and Kampong Ayer Warisan Negara Packages: 7th January 2017;
2. Launching of the Heritage Trail at Bandar Seri Begawan: 7th January 2017;
3. Tourist Information Center at the Bandar Seri Begawan Royal Wharf: 7th January 2017;
4. ASEAN Community-Based Tourism Award: Awarded to MPK Kampong Kiudang, Tutong: 20th January 2017;
5. Dissemination of the Tourism Order 2016: On the 18th February 2017;
6. Brunei Gastronomy Week 2017: From 22nd – 26th February 2017;
7. Art Affairs for the Bandarku Ceria event: Initiated on the 12th March 2017;
8. Public Toilet Audit: Initiated on the 20th March 2017;
9. The Development of National Standard on Tourism;
10. Promotion on Diving Tourism Package: 12th July 2017;
11. Promotion on Tutong Holiday Package: 23rd August 2017;
12. Launching of Brunei Events Website: 1st November 2017;
13. Promotion on Belait Holiday Package: 29th November 2017; and
14. Brunei December Festival 2017: Launched on the 3rd December 2017.



PROJECTS PLANNED FOR 2018



January							February							March							April						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
14	15	16	17	18	19	20	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
28	29	30	31				25	26	27	28				25	26	27	28	29	30	31				29	30		

May							June							July							August						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
13	14	15	16	17	18	19	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
27	28	29	30	31			24	25	26	27	28	29	30				22	23	24	25	26	27	28	29	30	31	

September							October							November							December						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
2	3	4	5	6	7	8	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
16	17	18	19	20	21	22	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
23	24	25	26	27	28	29	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			

☐ ASEAN Tourism Awards:

- ASEAN Clean Tourist City Award: Awarded to Bandar Seri Begawan;
- ASEAN Green Hotel Award: Awarded to Radisson Hotel dan Ulu-Ulu Resort; and
- ASEAN MICE Venue Award: Awarded to Radisson Hotel, The Empire Hotel and Country Club dan V Plaza Hotel.

☐ Tourism Events:

- Brunei Nature Festival 2018;
- Brunei Gastronomy Week 2018;
- Richard Mille Brunei Championship; and
- Brunei December Festival 2018.

☐ Product Development Projects:

- Relaunching of the Temburong Holiday Destination Package;
- Kampong Ayer Heritage Trail;
- River Cruise Heritage Trail;
- Belait Adventure Trail (Labi dan Teraja);
- Islamic Tourism Packages; and
- Medical Tourism Packages.





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Thank You



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