



كمنترين سومبرا۲ اوتام دان قلنچوغن
MINISTRY OF PRIMARY RESOURCES AND TOURISM
BRUNEI DARUSSALAM

BRUNEI TOURISM PERFORMANCE REPORT 2017

BRUNEI

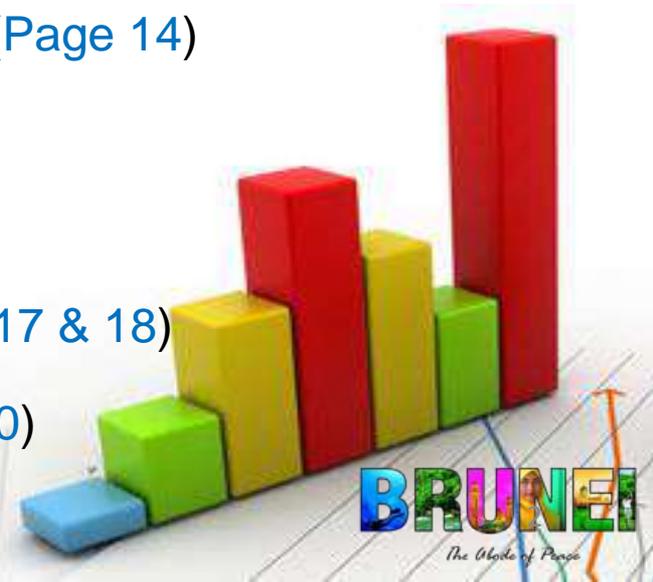
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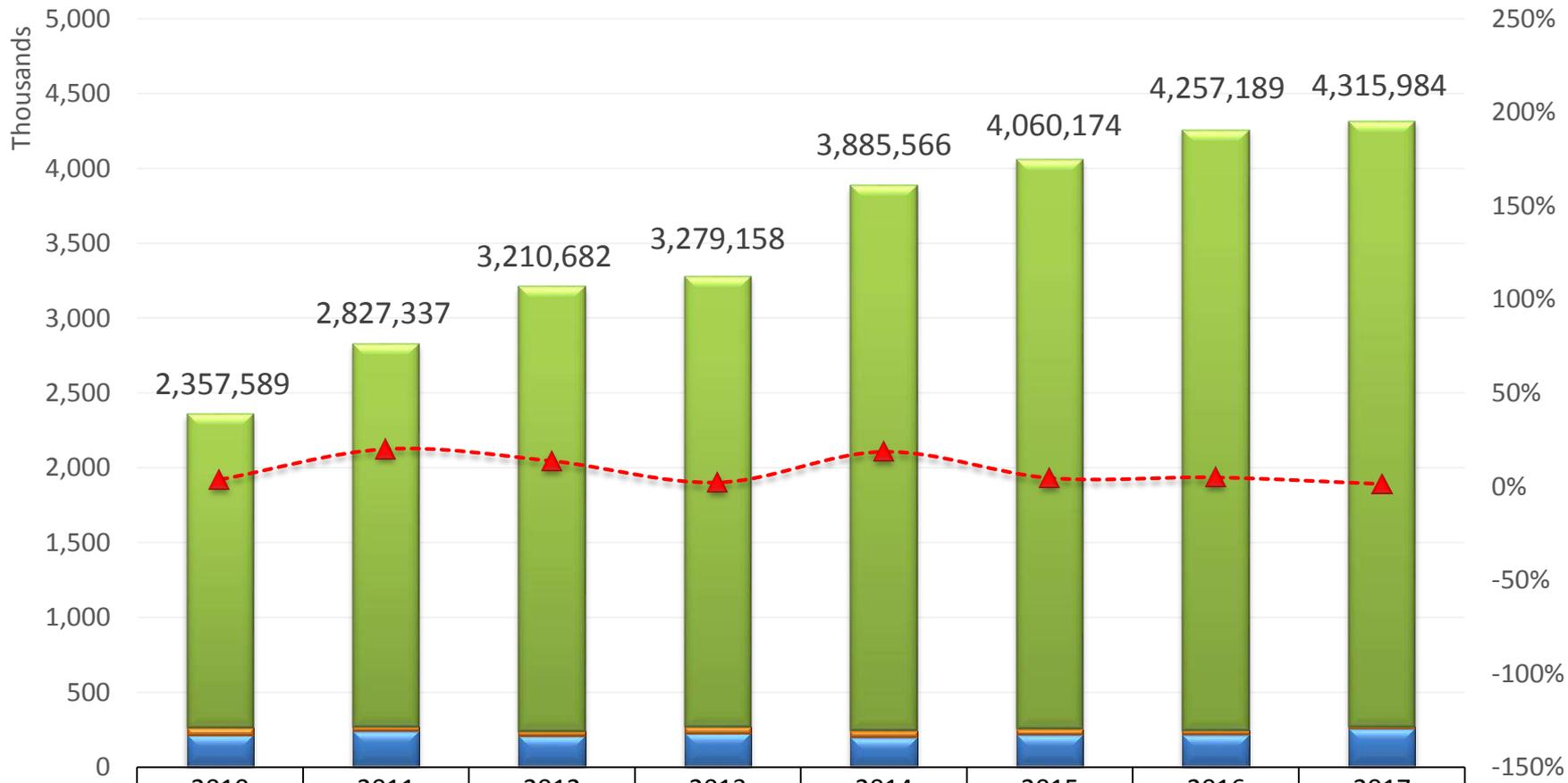
Report as of February 2018



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International Visitor Arrivals to Brunei, 2010-2017

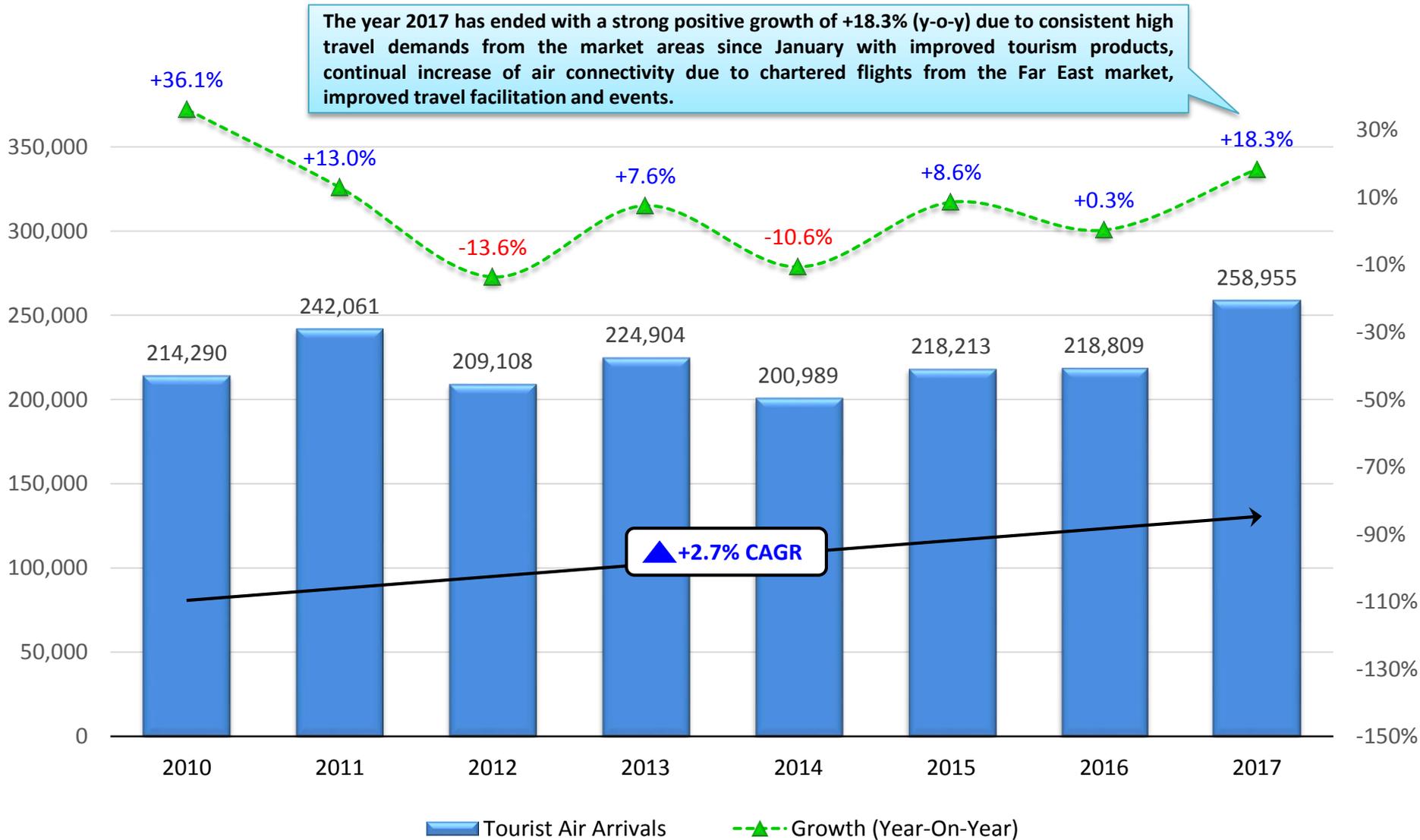


	2010	2011	2012	2013	2014	2015	2016	2017
BORDER	2,095,129	2,558,336	2,973,672	3,011,038	3,645,531	3,806,272	4,013,325	4,046,143
CRUISE	48,170	26,940	27,902	43,216	39,046	35,689	25,055	10,886
AIR	214,290	242,061	209,108	224,904	200,989	218,213	218,809	258,955
Growth (Y-O-Y)	+3.7%	+19.9%	+13.6%	+2.1%	+18.5%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

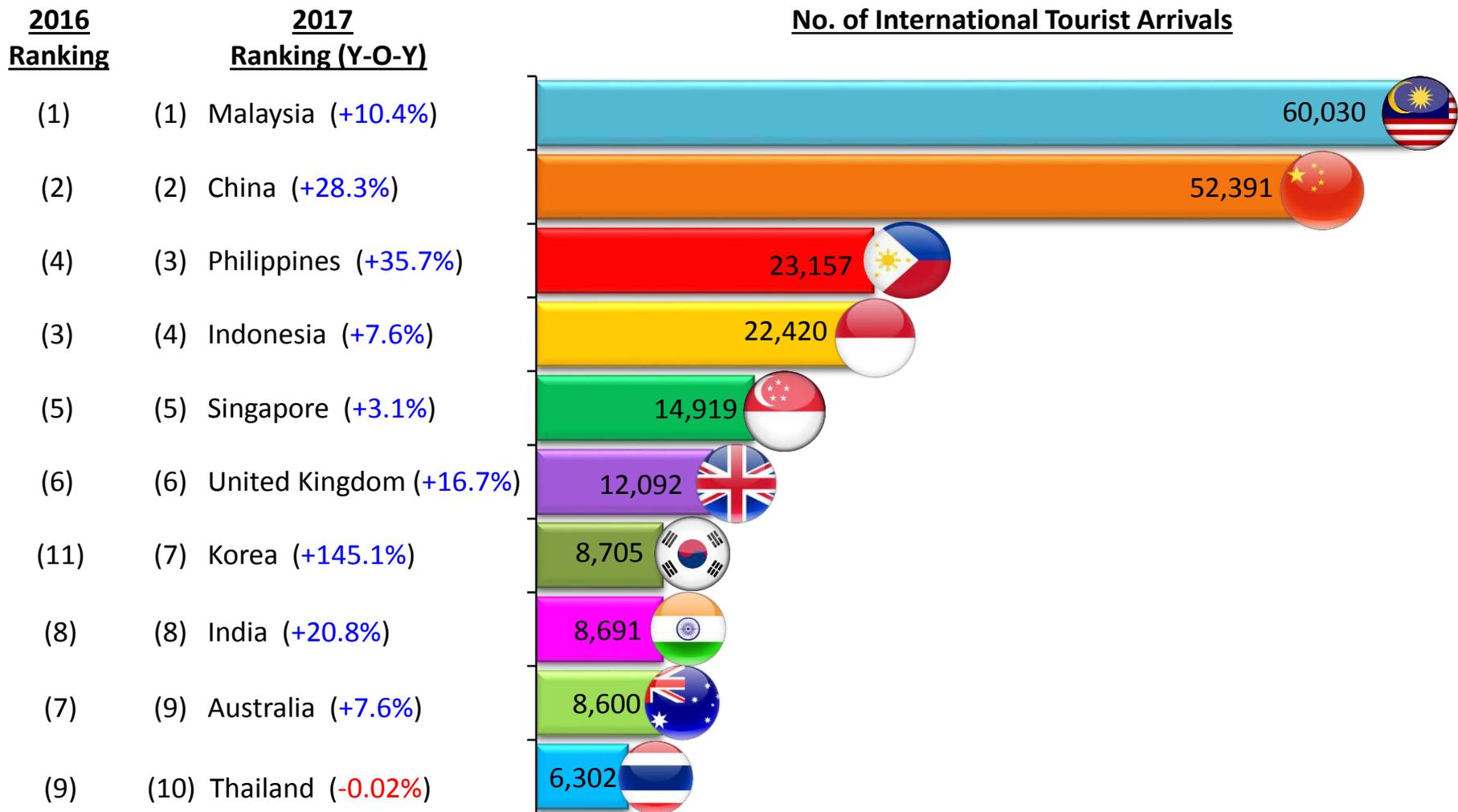
Source: *Tourism Development Department, Ministry of Primary Resources and Tourism; Immigration and National Registration Department, Ministry of Home Affairs; and Ports Department, Ministry of Communications.*

International Tourist Arrivals to Brunei by Air, 2010-2017



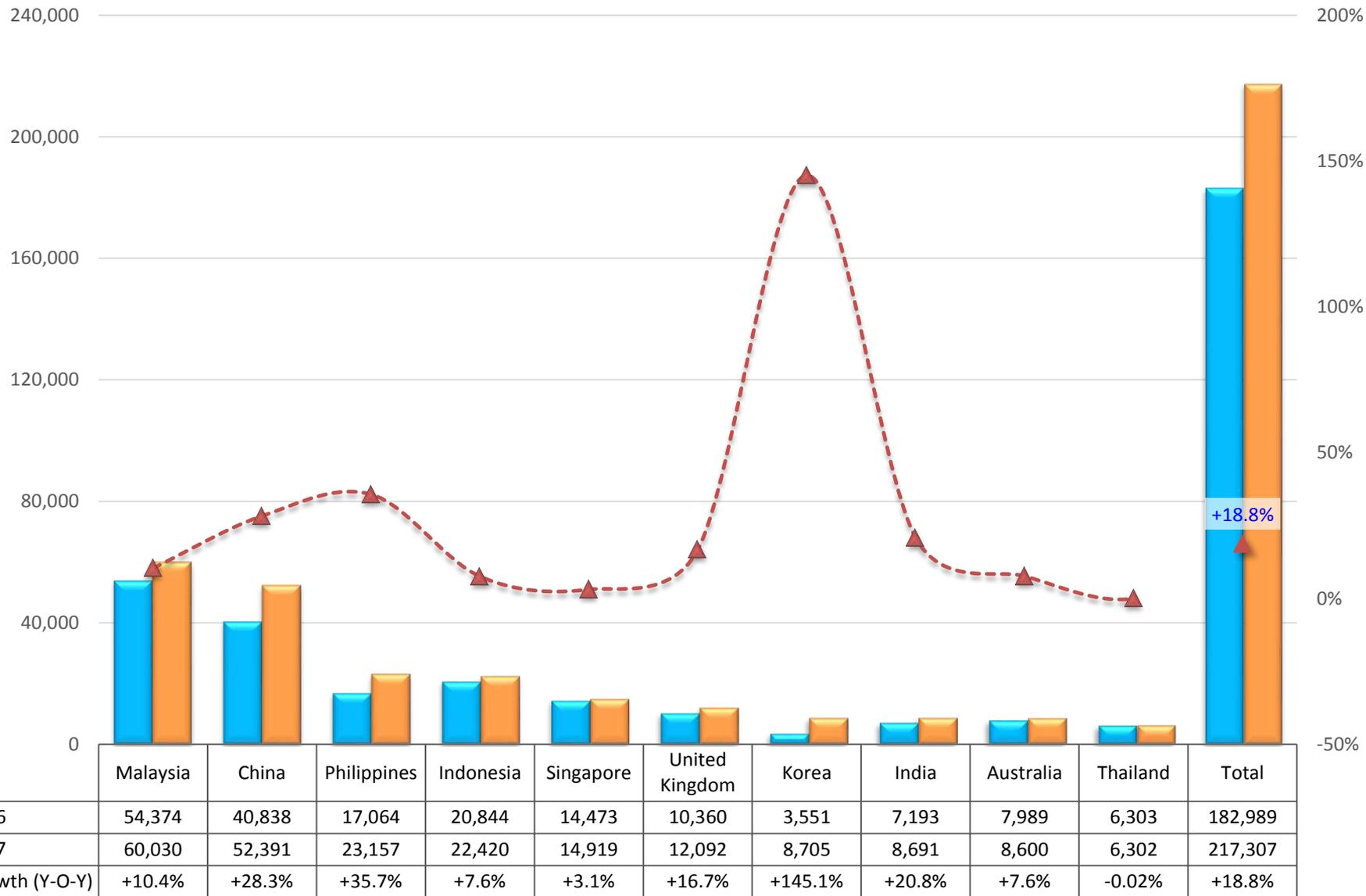
Over the past 8 years (2010-2017), visitor arrivals by air have shown a Compound Annual Growth Rate (CAGR) of **+2.7%**.

International Tourist Air Arrivals from Top 10 Countries, 2017



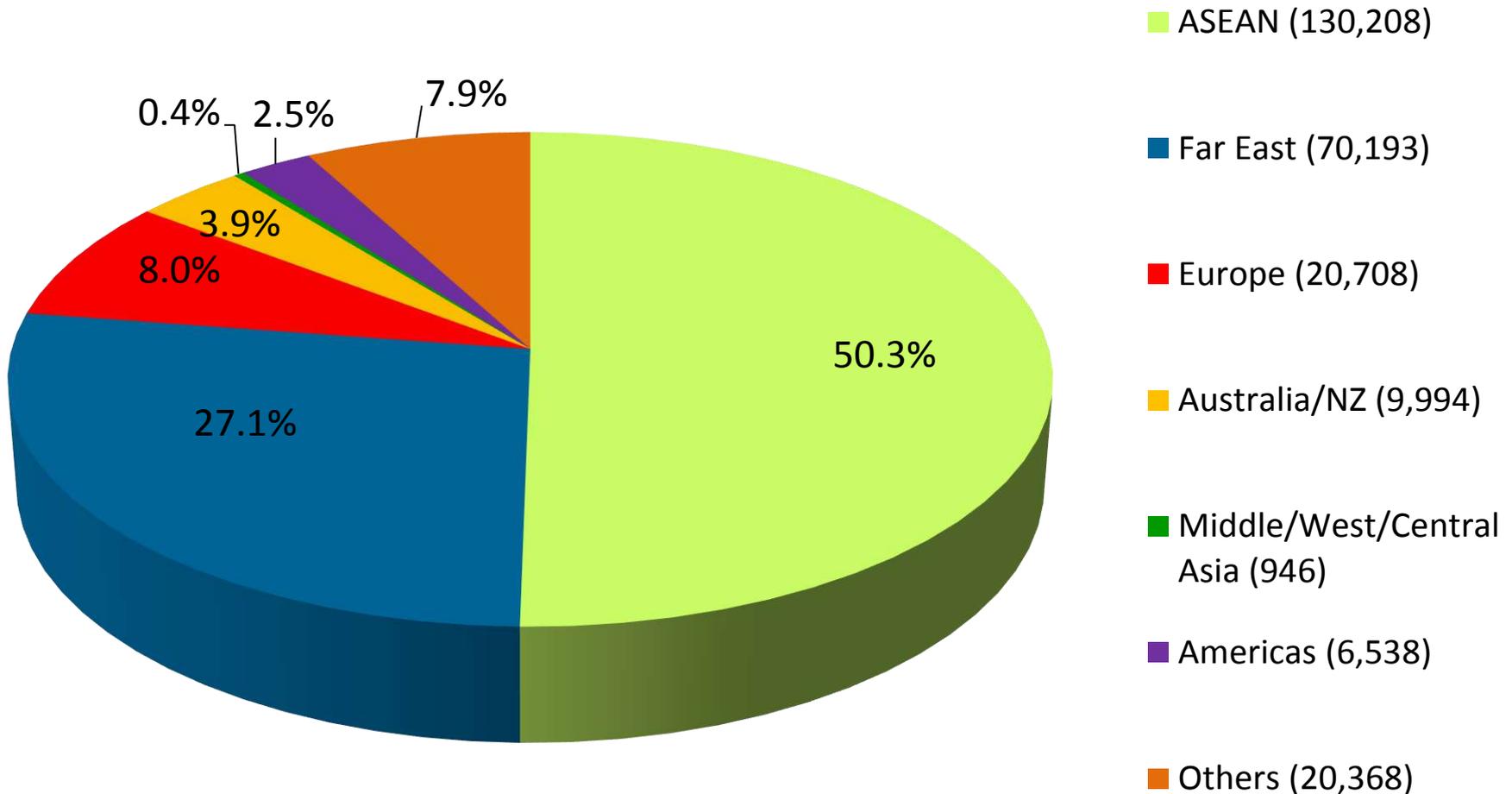
Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

International Tourist Air Arrivals from Top 10 Countries, 2016 & 2017



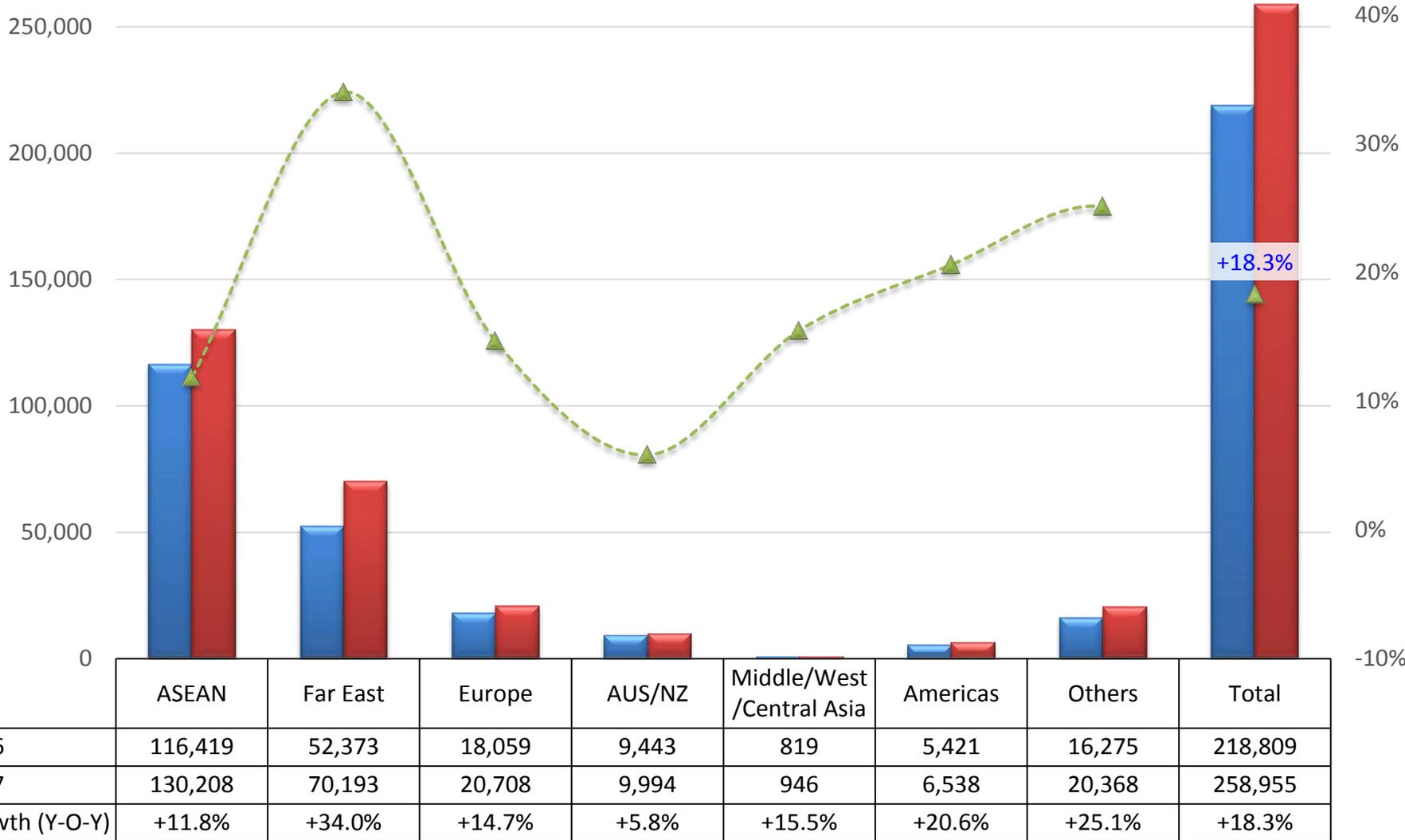
Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

International Tourist Air Arrivals by Region, 2017



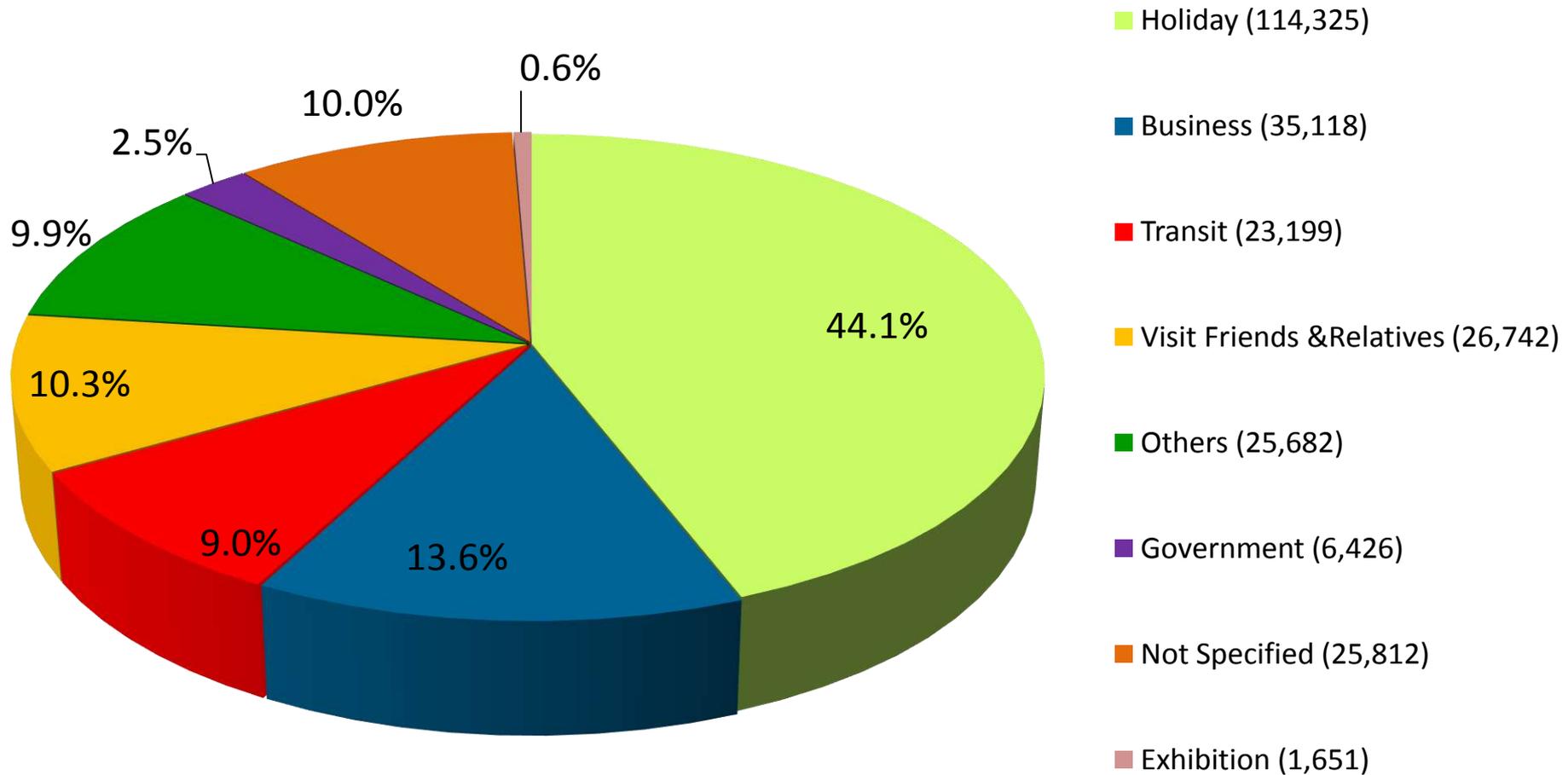
Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

International Tourist Air Arrivals by Region, 2016 & 2017



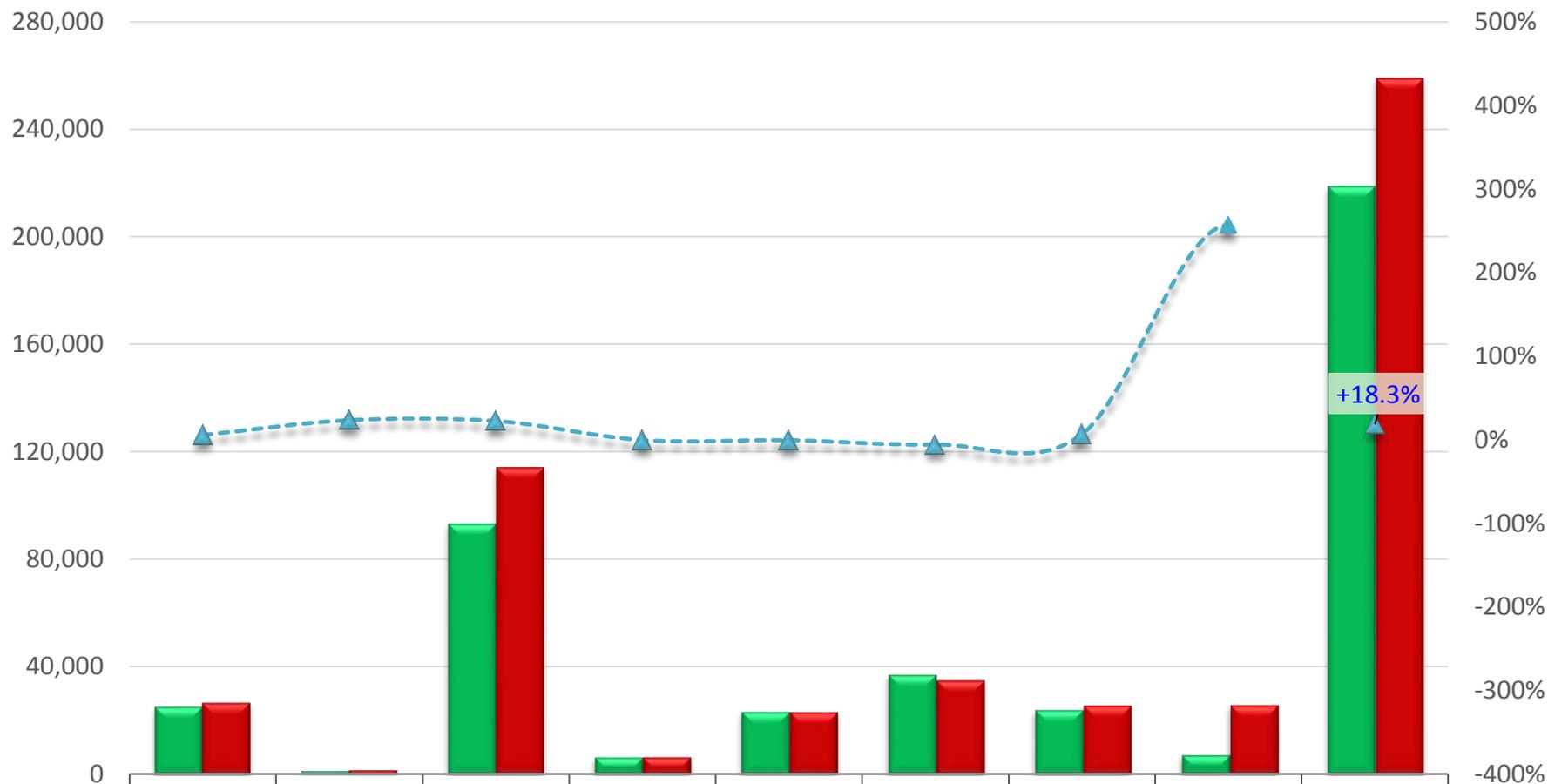
Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

International Tourist Air Arrivals by Purpose of Visits, 2017



Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

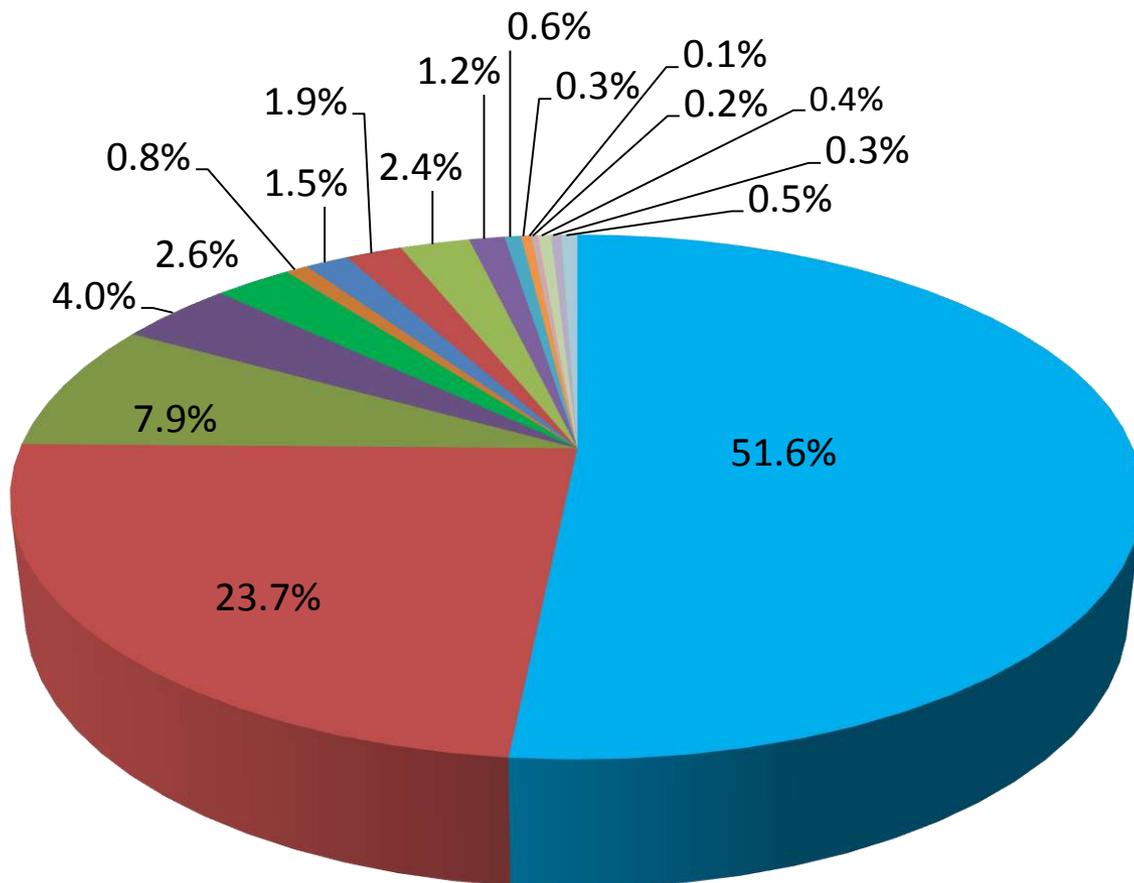
International Tourist Air Arrivals by Purpose of Visits, 2016 & 2017



	VFR	Exhibition	Holiday	Government	In Transit	Business	Others	Not Specified	Total
2016	25,350	1,340	93,544	6,468	23,394	37,339	24,146	7,228	218,809
2017	26,742	1,651	114,325	6,426	23,199	35,118	25,682	25,812	258,955
Growth (Y-O-Y)	+5.5%	+23.2%	+22.2%	-0.6%	-0.8%	-5.9%	+6.4%	+257.1%	+18.3%

Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

Places of Interest, 2017

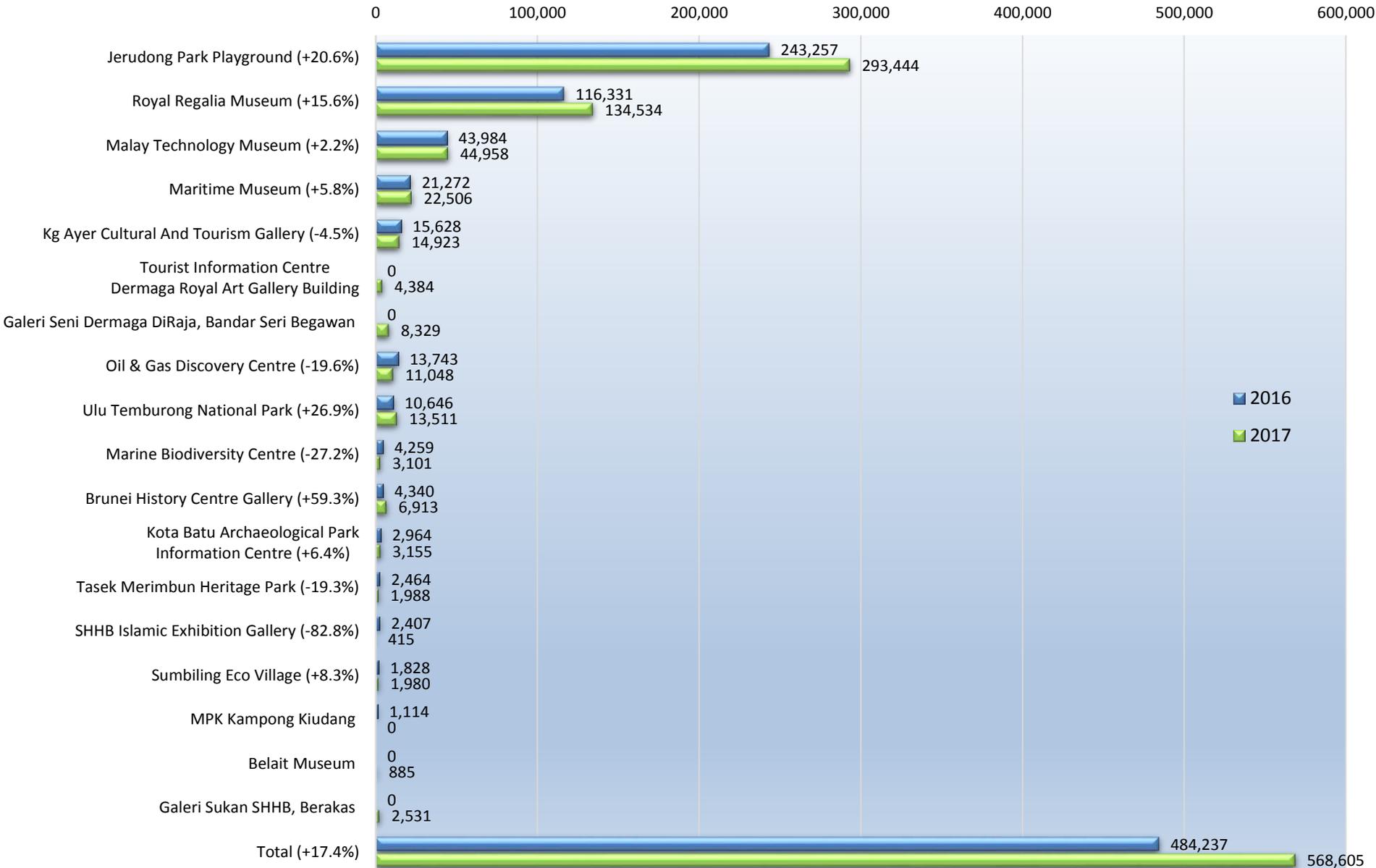


- Jerudong Park Playground (293,444)
- Royal Regalia Museum (134,534)
- Malay Technology Museum (44,958)
- Maritime Museum (22,506)
- Kg Ayer Cultural & Tourism Gallery (14,923)
- Tourist Information Centre Bangunan Gelari Seni Dermaga Diraja (4,3842)
- Galeri Seni Dermaga DiRaja, BSB (8,329)
- Oil & Gas Discovery Centre (11,048)
- Ulu Temburong National Park (13,511)
- Brunei History Centre Gallery (6,913)
- Kota Batu Archaeological Park Information Centre (3,155)
- Tasek Merimbun Cultural Heritage (1,988)
- SHHB Islamic Exhibition Gallery (415)
- Kuala Belait Museum (885)
- Galeri Sukan SHHB, Berakas (2,531)
- Sumbiling Eco Village (1,980)
- Marine Biodiversity Centre(3,101)

Total number of visitors are based on local and foreign visitors

Source: Tourism Development Department, Biodiversity Research and Innovation Centre (BioRic) and Forestry Department, Ministry of Primary Resources and Tourism; Ministry of Culture, Youth and Sport; State Mufti Department, Prime Minister's Office; Hasa Incentive, Jerudong Park Country Club Sdn Bhd; Oil & Gas Discovery Centre, Brunei Shell Petroleum Co. Sdn Bhd; and Village Consultative Councils (MPK) of Kampong Kiudang.

Places of Interest, 2016 & 2017



Note: 1. TIC Dermaga DiRaja (Opened on the 7th January 2017); 2. Galeri Seni Dermaga Diraja (Launched on 16th January 2017);
3. Brunei Museum (Still under renovation); and 4. Belait Museum (Opened on July 2016)

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

Definition:

- a) **Hotels, Resort & Apartments:** Accommodation for tourists or guests for hire or any other form of reward that offers professional service and for Resorts is situated in a suitable location free of noise, atmospheric and marine pollution. Such as (*Radisson Hotel Brunei Darussalam, The Empire Hotel & Country Club and Abdul Razak Hotel Apartment*);
- b) **Guesthouses & Lodging:** Accommodation provided in a private house or commercial building run by the owner. Such as (*Nazira Guesthouse, Freme Rainforest Lodge House and Sumbiling Eco Village*);
- c) **Government Guesthouses:** Accommodation provided in a private house or commercial building run by the Government. Such as (*Pusat Belia and Rumah Persinggah Kerajaan*)
- d) **Homestays:** A form of hosted accommodation at a residence where guests will stay with the host's family and experience the everyday way of life of the family and community. Such as (*Baitul Wajihah Homestay, Kampong Sungai Matan Homestay and Kunyit 7 Lodge*)

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%

Travel Agents, 2012 – 2017

	2012	2013	2014	2015	2016	2017
Number of Companies	44	45	53	57	60	65

Note:

Number of registered Travel Agents under the Tourism Development Department are based on inbound and outbound travel.

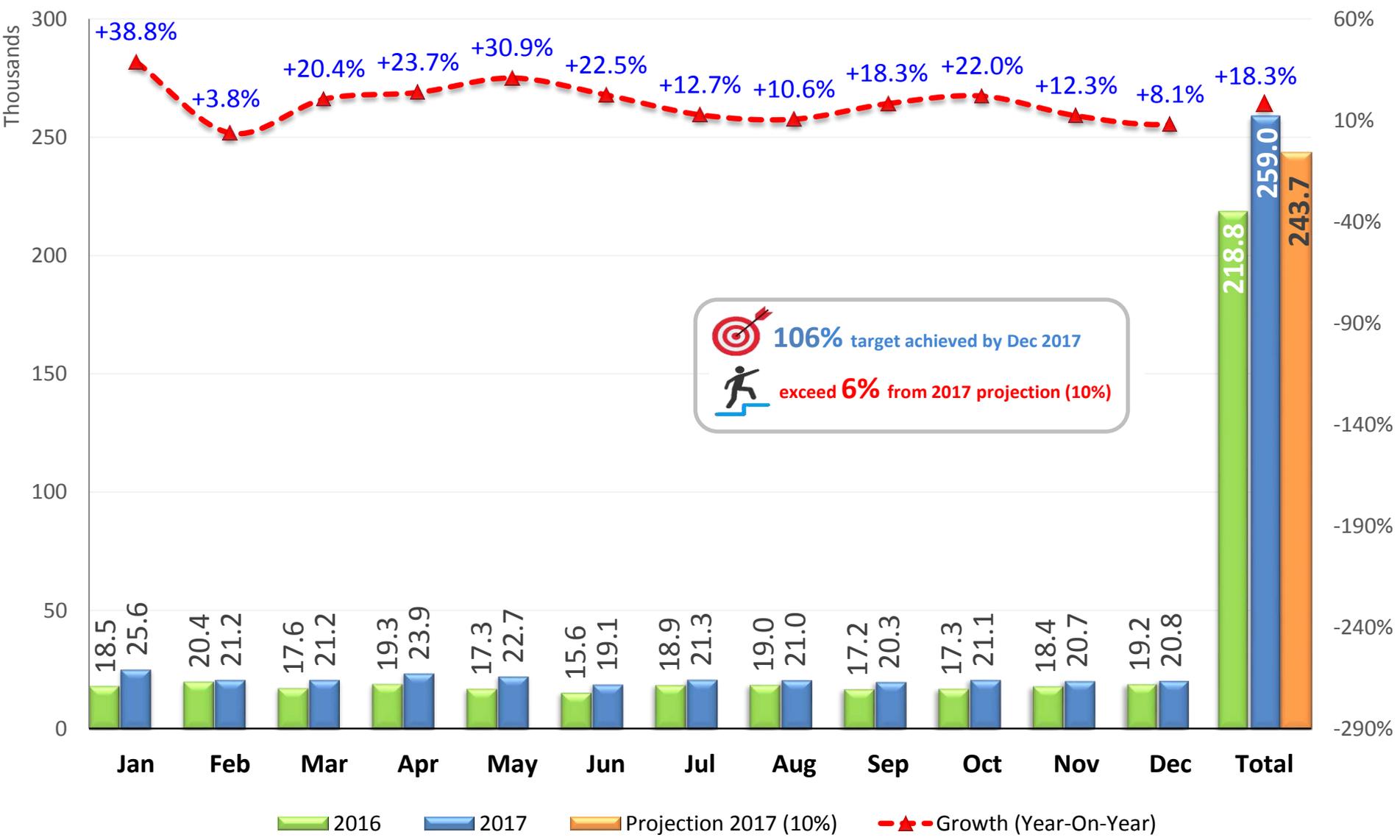
Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Travel Agents in Brunei Darussalam.

Employment, 2012 – 2017

	2012	2013	2014	2015	2016	2017
1) Travel Agents:						
a) Local	475 (71%)	376 (56%)	418 (58%)	424 (58%)	430 (57%)	429 (57%)
b) Non-Local	198	296	303	311	330	336
c) Total	673	672	721	735	760	765
2) Accommodation:						
a) Local	1,182 (63%)	1,232 (63%)	1,351 (65%)	1,440 (68%)	1,519 (69%)	1,559 (69%)
b) Non-Local	686	710	721	687	674	685
c) Total	1,868	1,942	2,072	2,127	2,193	2,244
3) Tour Guide (Free Lance):						
a) Local	-	-	-	-	37 (100%)	60 (100%)
b) Non-Local	-	-	-	-	-	-
c) Total	-	-	-	-	37	60
Total Direct Employment	2,541	2,614	2,793	2,862	2,990	3,069

Source: Tourism Development Department, Ministry of Primary Resources and Tourism; Travel Agents in Brunei Darussalam; and Accommodations in Brunei Darussalam.

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



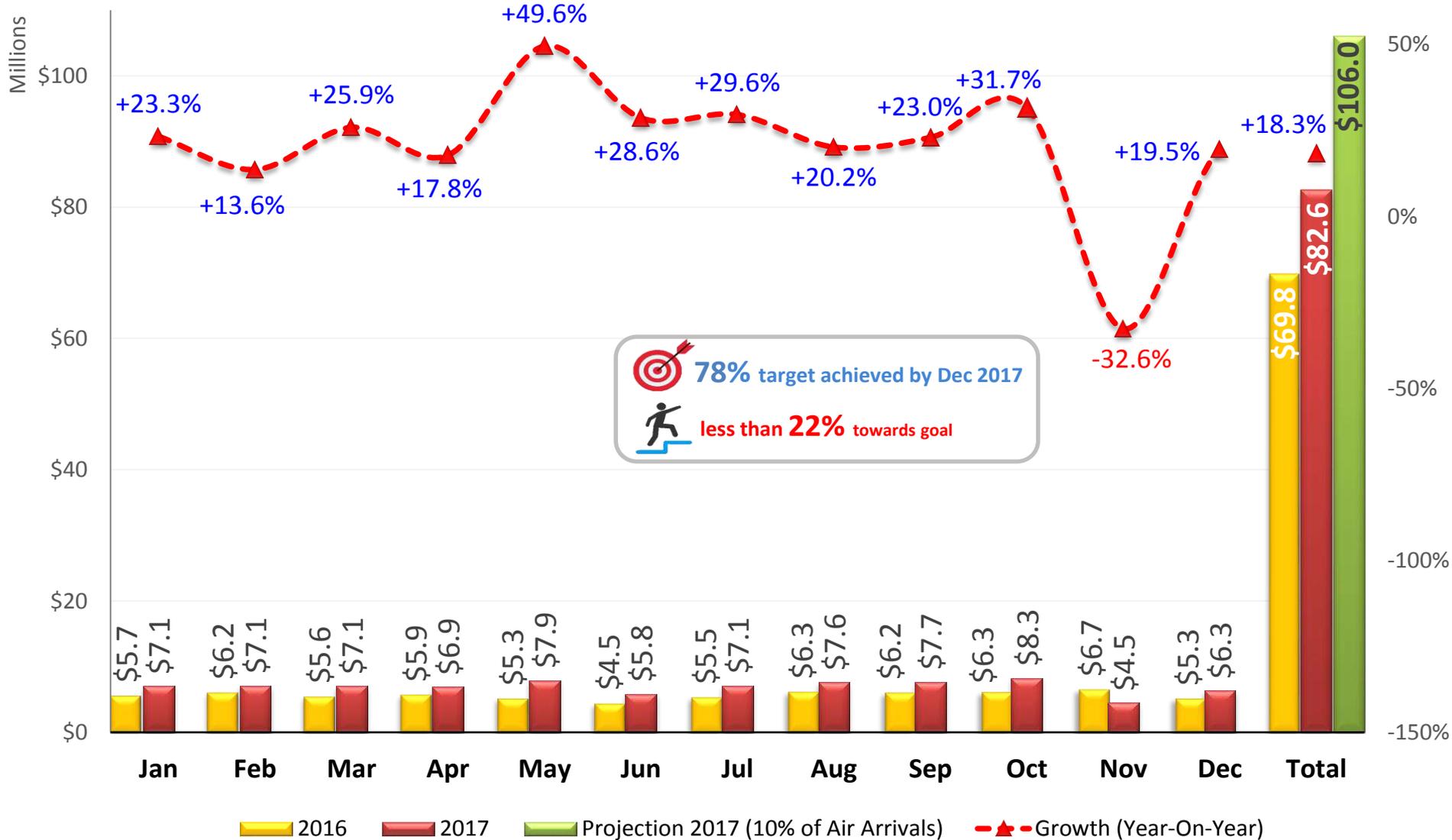
Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs

International Tourist Air Arrivals by Quarterly Trend and Target, 2017



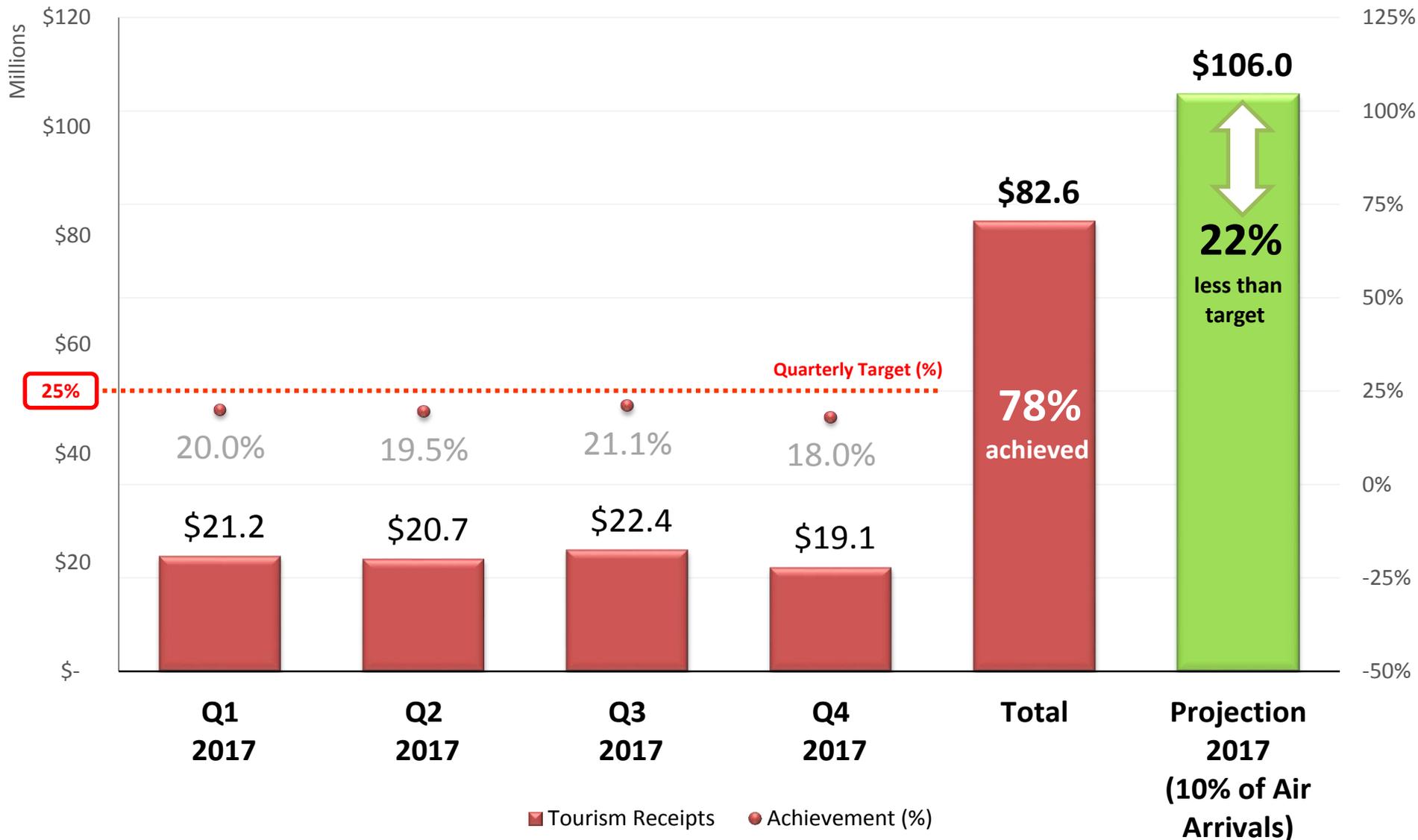
Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs

Tourism Receipts by Monthly Trend and Target, 2016 & 2017



Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs

Tourism Receipts by Quarterly Trend and Target, 2017



Source: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs

Target Performance, 2017/ 2018

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





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