

# 澳門旅遊業發展總體規劃

## Macao Tourism Industry Development Master Plan

### Consultation Paper

Consultation Period  
23 May to 22 July 2016



澳門特別行政區政府旅遊局  
DIRECÇÃO DOS SERVIÇOS DE TURISMO



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The background of the entire page is a dense, textured illustration in a reddish-brown hue. It depicts a wide, crowded street, likely in a historic European city, filled with people. Large, spherical lanterns or balloons, some with intricate patterns, hang from the street. The architecture features multi-story buildings with arched windows and doorways. On the right side, a building has a sign that reads "ISA".

## 1. Planning Background



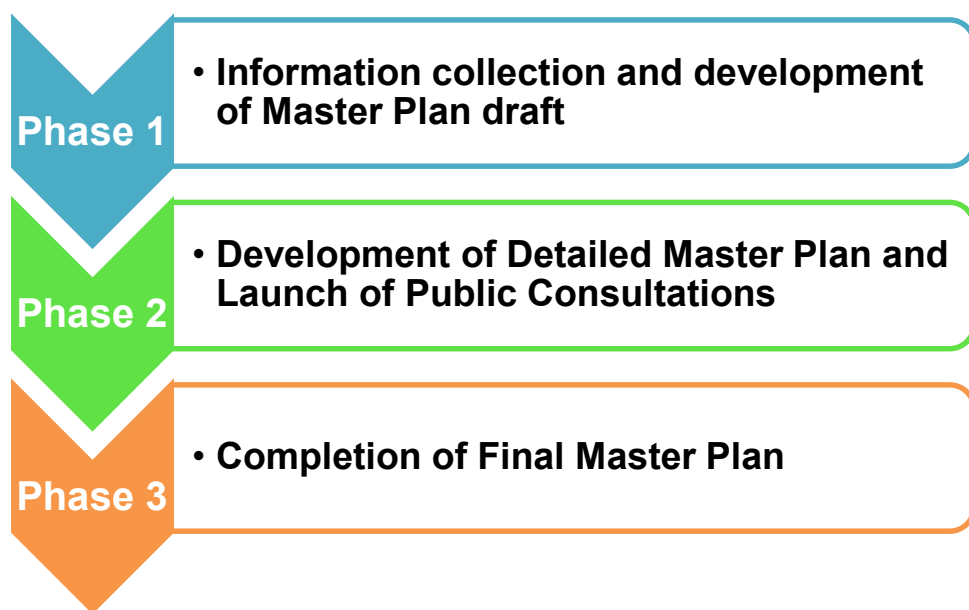
# 1. Planning Background

## PLANNING BACKGROUND

Over the years, Macao has been a trading port and gateway between China and Europe. The tourism industry has been developed for over a century, which becomes the pillar industry of Macao today. The unique blend of Portuguese and Chinese culture has drawn visitors and business people from all over the world. With the opening up of travel trade, improvements in infrastructure and steady economic growth, the tourism industry in Macao has been growing exponentially.

With continuous growth of visitors from different parts of the world, the tourism industry of Macao has lots of development potential. However, the city faces constraints in limited land, human resources and other areas. To support the Macao SAR's vision to become the "World Centre of Tourism and Leisure", Macao Government Tourism Office initiated the Macao Tourism Industry Master Plan Project in 2015. The objective is to carry out a comprehensive study and to provide a guideline for the development of Macao's tourism industry for the next 15 years. This master plan will cover many aspects, including studies on tourism products, source markets, service quality and other areas.

As a critical component of this project, the public consultation is a major milestone which aims to collect opinions and suggestions from all sectors of society and help shape the city's sustainable tourism development in the future.



## POSITIONING MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

In 2011, the 12th Five Year Plan for National Economic and Social Development has announced the Central Government's support for positioning Macao in becoming the "World Centre of Tourism and Leisure". In 2016, the 13th Five Year Plan has further reassured this positioning. As the bridge between the East and West for mutual understanding and cultural exchanges, Macao has developed into a world famous tourist destination. Macao's positioning as the World Centre of Tourism and Leisure is in line with the trends of our time and the SAR's strategy of economic diversification. The vision in the tourism area is to elevate the city to the next level as a world-known tourism destination with impressive tourism products and rich leisure experiences.





# 1. Planning Background

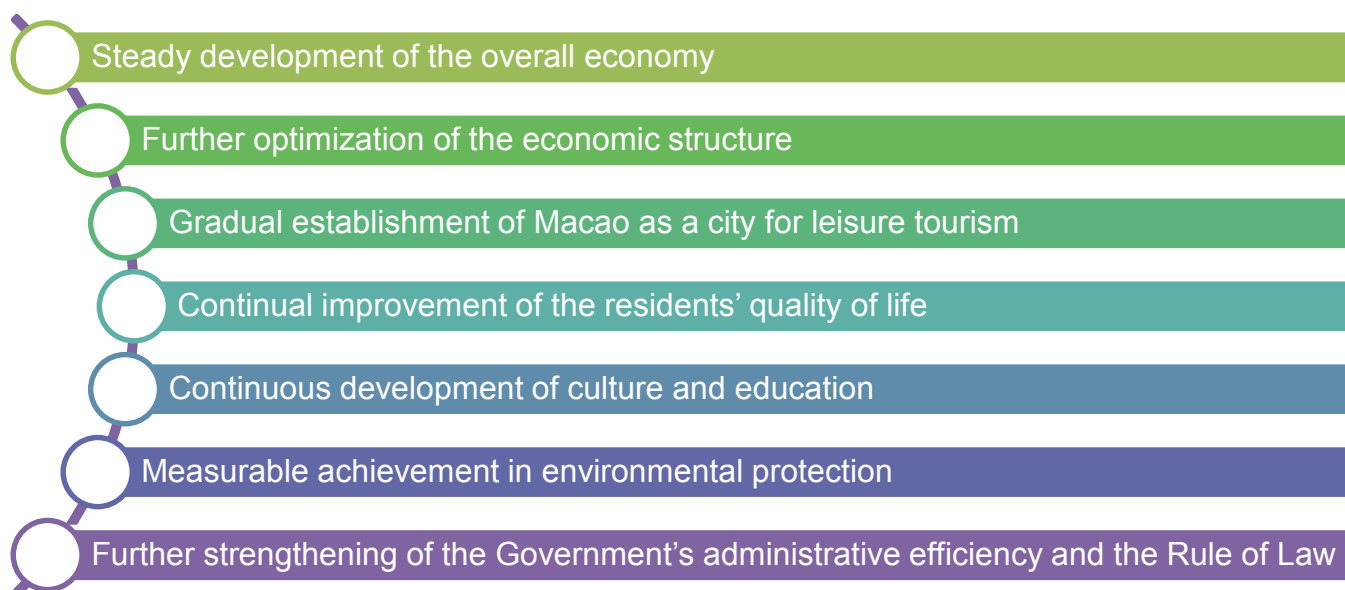
## TOURISM INDUSTRY AND MACAO SAR'S FIVE-YEAR DEVELOPMENT PLAN

In order to achieve the goal of transforming Macao into the “World Centre of Tourism and Leisure”, the Macao SAR Government has set up the “The Committee for Development of the World Centre for Tourism and Leisure ” chaired by the Chief Executive. The Government has also drafted the “Five-Year Development Plan” (2016-2020) for the Macao Special Administrative Region (“the Five-Year Plan”) with the goal to stabilize the economic growth, expedite the city’s transformation into the World Centre of Tourism and Leisure, and improve the livelihood of local residents.

Following the above development goals, Macao will strive to become a world class tourism city that is livable, convenient, fun, enjoyable, a city with opportunities. In the future, Macao will be developed into a city enjoying international standards of living, work, transportation, tourism and entertainment.

Under the guidance of the Five-Year Plan, the Macao Tourism Industry Master Plan will formulate goals and strategies in line with the SAR government’s development vision. In addition to analysis of the current situation of Macao’s tourism, the Master Plan will also propose short, medium, and long term strategies for the tourism product system, source markets, tourism branding and positioning, as well as tourism and urban development. These strategies will also echo the development goals in the Five-Year Plan, including to foster the development of Macao as a city for leisure tourism, enhance the overall development of the tourism industry, and promote new development of cultural tourism.

### Seven Goals of the Macao SAR’s Five-Year Development Plan



## OVERALL GOALS OF THE MASTER PLAN

Guided by Macao's positioning as the "World Centre of Tourism and Leisure" and based on analyses of the current situation, the Macao Tourism Industry Master Plan put forward four overall goals, each supported by short, medium and long term measures.



### 1. Manage Sustainable Future Growth

The rapid growth of tourism has generated opportunities and economic benefits for Macao, but has significantly strained the city's resources and impacted the quality of life. Therefore, managing tourism growth in a sustainable way to improve the livelihood of its residents is an important goal in developing Macao as the "World Centre of Tourism and Leisure".



### 2. Diversify Tourism Products

World Class destinations have a diversity of tourism products, accommodation options, cultural facilities, retail shops, and various events. Macao needs to offer a diversified and attractive tourism product mix and experience.



### 3. Attract High Value Visitor Market

Growing international and Asian visitor markets present great opportunities for Macao in broadening source markets and diversifying products, including attracting MICE business, conferences, events and other high value visitors. Fostering the development of Smart Tourism to enhance visitors' convenience.



### 4. Improve Tourism Service Quality

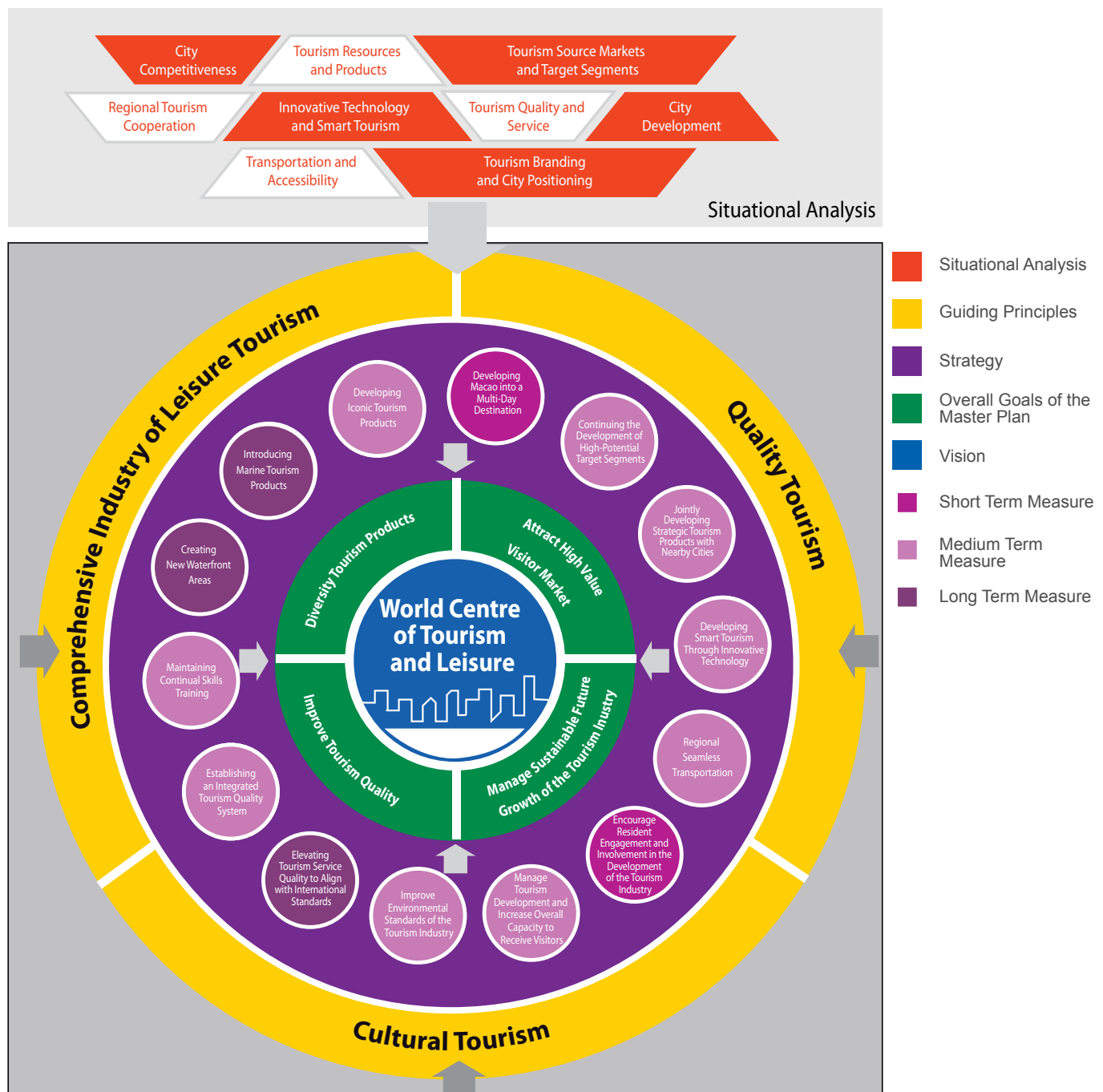
Industry professionals and skilled service providers are critically important for the successful development of Macao's tourism sector. Macao needs to continuously raise service quality and efficiency, and enhance tourist convenience to make itself a world-class tourist destination.



# 1. Planning Background

## FRAMEWORK OF MACAO TOURISM INDUSTRY MASTER PLAN

Based on detailed analysis of the current situation, in light of Macao's vision as the "World Centre of Tourism and Leisure", and guided by the targets of the Five-Year Plan, the Master Plan upholds the guiding principles of "comprehensive industry of leisure tourism", "quality tourism" and "cultural tourism". The plan proposes 14 strategies, supported by short, medium, and long term measures. These strategies and measures are the pathways to realize the 4 overall goals of the Master Plan, as well as the vision to achieve Macao as the "World Centre of Tourism and Leisure".













## 2. Baseline Analysis And Challenges

## 2. Baseline Analysis And Challenges

### CITY COMPETITIVENESS

#### Current Status

Macao is a popular tourism destination, with a total visitor arrivals over 30.7 million in 2015, and is among the top-listed cities in terms of visitation. Using international visitor arrivals as a benchmarking indicator, Macao ranked 6th out of the top 100 cities worldwide in 2014. However, with the aim to further prolong visitors' length of stay, Macao needs to learn from other world famous tourism cities, especially in the area of tourism product diversification.

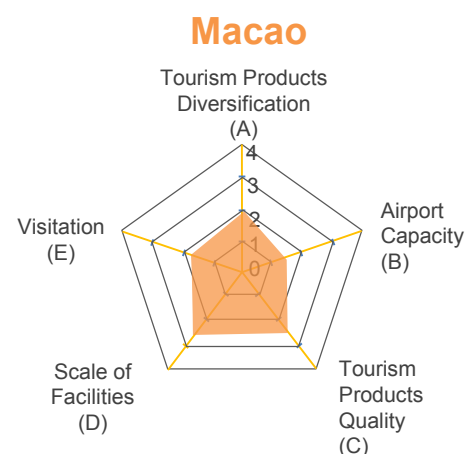
#### Challenges

- Compared with other world famous tourism cities, the average length of stay for international visitors to Macao is relatively short.
- Macao should draw lessons from successful experiences of other world-class tourism destinations in the areas of transport accessibility and product diversification, and make continuous improvements.

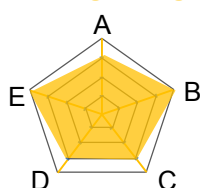
### Competitive Analysis of Worldwide Tourism Destinations, 2014

City	Ranking of International Visitors Arrivals	No. of International Visitors*	Airport Capacity	Average Length of Stay
<b>Macao</b>	<b>6</b>	<b>14.97 m</b>	<b>5.50 m</b>	<b>1.9 days</b>
<b>Hong Kong</b>	<b>1</b>	<b>27.70 m</b>	<b>63.30 m</b>	<b>3.3 days</b>
<b>Singapore</b>	<b>3</b>	<b>17.10 m</b>	<b>54.10 m</b>	<b>3.7 days</b>
<b>London</b>	<b>2</b>	<b>17.40 m</b>	<b>73.40 m</b>	<b>4.6 nights</b>
<b>Paris</b>	<b>5</b>	<b>14.98 m</b>	<b>14.10 m</b>	<b>2.7 nights</b>
<b>Las Vegas</b>	<b>22</b>	<b>6.30 m</b>	<b>42.90 m</b>	<b>4.2 days</b>

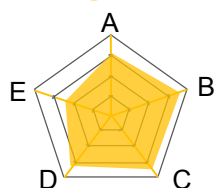
\*No. of International Visitors excluding same day visitors and domestic visitors



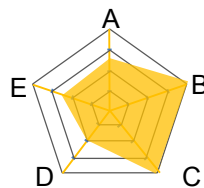
#### Hong Kong



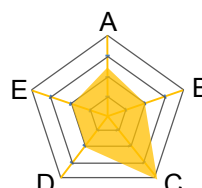
#### Singapore



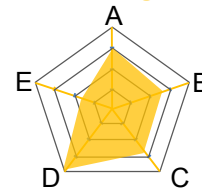
#### London



#### Paris



#### Las Vegas



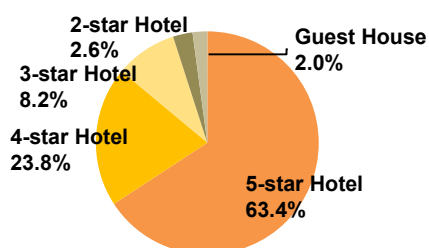


## TOURISM RESOURCES AND PRODUCTS

### Current Status

Macao possesses UNESCO world cultural heritage, both tangible and intangible. Starting from the end of 2015, Macao SAR habitual sea area was confirmed to be 85km<sup>2</sup>, which provides a foundation for developing marine tourism products.

Percentage of Rooms Available  
According to Hotel Classification



### Challenges

- Macao holds a leading position in the global gaming market, in which Macao's gaming revenue contributed 34% to the world's total gaming revenue in 2015. However, there is still ample room for the utilization and development of other tourism products and resources.
- By the end of 2015, the total number of hotel rooms registered at 33,047, in which over 60% are five-star hotels. As a result, Macao is facing an imbalanced hospitality offering.
- Given the administered sea area of Macao, the currently available waterfront spaces should be leveraged to develop dynamic and attractive water activities.
- The number of family-oriented entertainment facilities is rising, however additional marketing campaigns are still needed.



## 2. Baseline Analysis And Challenges

### TOURISM RESOURCES AND PRODUCTS

#### Current Status

The tourism products provided by Macao mainly include culture, MICE, gaming, shopping, and festivities. Among these, World Cultural Heritage and integrated resorts are the most popular attractions. In the meantime, Macao is undergoing a process to broaden its selection of tourism products.



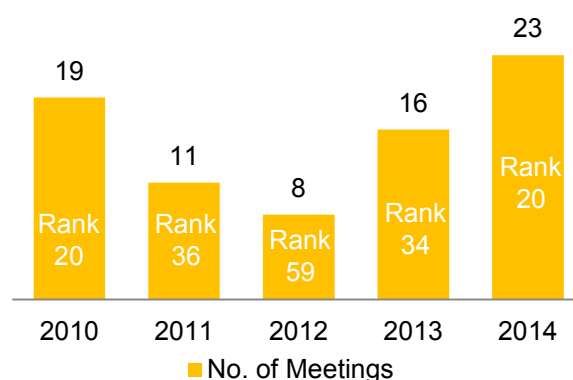
#### Challenges

- According to ICCA statistics, Macao is lagging far behind other conference cities in Asia in terms of both conference numbers and attendance.
- Macao has a lack of diversified shopping centers. According to the Index of Global Shoppers in Asia Pacific, Macao is not included in the world's top 10 cities in terms of shopping environment.
- At present, the festivals and events hosted in Macao include "Macao Grand Prix" and "Parade through Macao, Latin City", etc. Although these events have all become representative international activities, their worldwide popularity needs to be augmented. In the future, more favorable conditions should be provided to facilitate the hosting of more international mega competitions and events.

Asian Cities Worldwide Rankings by No. of Participants, 2014

City	Meetings	Delegates	Ranking of Delegates, Worldwide
<b>Macao</b>	<b>23</b>	<b>Less than 25,000</b>	<b>&gt;42</b>
Singapore	142	57,497	10
Kuala Lumpur	79	48,341	20
Hong Kong	98	41,956	23
Taipei	92	39,280	25
Bangkok	73	27,483	34

Total No. of Meetings in Macao (2010-2014)



# TOURISM SOURCE MARKETS AND TARGET SEGMENTS

## Current Status

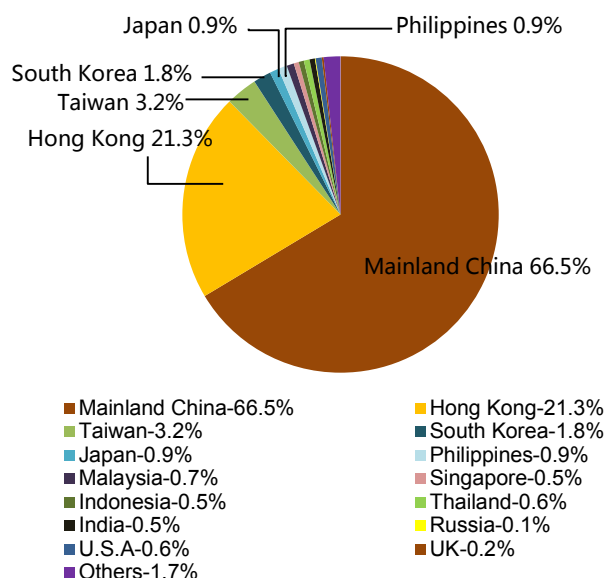
Over 90% of visitors are from Greater China, in which 66.5% are from Mainland China. Conversely, around 9% of visitors are from other countries.

According to statistics retrieved from 2008 to 2015, countries such as India, South Korea, and Mainland China have the greatest potential to contribute a rising number of visitors to Macao. With the changing external environment, adjustments had also taken place in tourism source markets in the recent years.

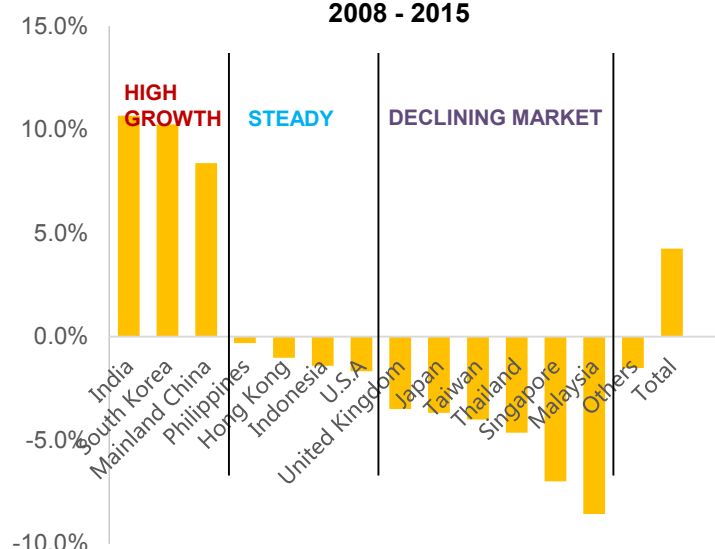
## Challenges

- Tourism source markets are over concentrated in Greater China (Mainland China, Hong Kong, and Taiwan). Conversely, the number of visitors from Europe, North America, and other long haul markets have been declining in recent years.
- Tourism is vulnerable to many external factors, such as varying economic cycles, attractiveness of competitive destinations, currency fluctuations; which in turn affects outbound visitation. Therefore contingent adjustments specific to market promotion must be rolled out to cope with these issues.
- The tourism industry in Macao should co-develop with other industries and carve out a unique set of target segments. Support and co-operation among all sectors of society will foster a more diversified tourism landscape.

**Macao Visitor Arrivals by Source Market 2015**



**Average Annual Growth Rate of Macao Visitor Arrivals by Source Market 2008 - 2015**





## 2. Baseline Analysis And Challenges

### TOURISM BRANDING AND CITY POSITIONING

#### Current Status

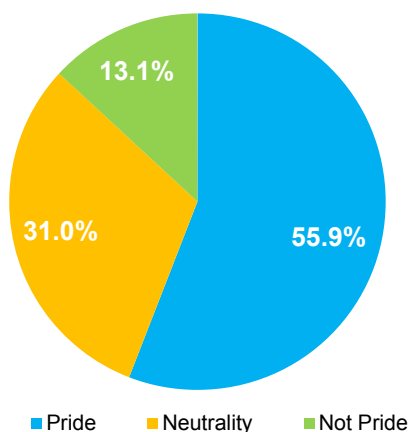
Gaming entertainment is the main Branding Image of Macao's tourism in the eyes of many source markets. However, there are many other potential brand qualities which already exist in Macao, including the cultural contrast of East and West, old and new, heritage and modern distinctive elements. The key for Macao is to merge its streets, cultural dynamics, and rich history, together with the "World Center of Tourism and Leisure" vision, and utilize its unique blend of Chinese and Portuguese cultures to form a strong brand value.



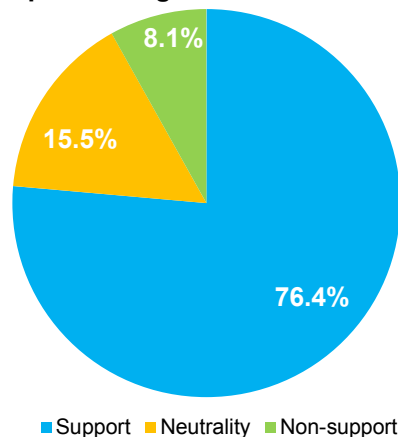
#### Challenges

- Support from local residents is essential to Macao's tourism branding and positioning. According to the resident survey, over 70% of residents showed their knowledge of Macao's positioning as the "World Center of Tourism and Leisure". Whilst 76% and 56% of residents showed their support, and are proud of the branding, respectively.
- Brand-building of a city is vital to determine its visitor types. The city image of Macao is strong on gaming and entertainment, followed by its distinctive Chinese-Portuguese cultures and world heritage. However, Macao has the potential to exhibit an impressive image by reconciling its resort facilities, MICE, arts, and festival events all into one integrated brand.
- Currently, gaming has exerted too much influence on the tourism branding of Macao. Promotions related to non-gaming tourism products should be strengthened in the future.

Residents' Perceptions of Macao's Tourism Positioning



Residents' Supportiveness for Re-positioning of Macao's Tourism



# INNOVATIVE TECHNOLOGY AND SMART TOURISM

## Current Status

Technology develops on a daily basis, and alters people's way of life. Visitors have access to abundant information about a destination and can make reservations online before a trip. They can also customize travel routes using GPS functions on a mobile device during a trip, and they can share their travel experiences on social media after a trip.

Currently, the MGTO website is available in 15 languages to cater the needs of different tourism source markets. Three related mobile apps are also available to download for easier access to information. Additionally, government bodies and other tourism entities in Macao provide their own apps to facilitate quick and convenient information searching for visitors.

The number of tourism facility and street signage related multimedia applications have begun to increase.



## Challenges

- In order to promote Macao as a world-class tourism destination, Wi-Fi Go is now available in over 200 spots in the city. However, the quality of this offering still needs further improvement.
- Online bookings and cashless transactions are not yet in practice compared with other world famous destinations, and there is ample room for development.
- Currently, travel information of Macao can be obtained through many websites and mobile apps. A successful destination should provide one integrated platform to enhance the overall travel experience for visitors.
- Most of the world's famous tourism destinations are harnessing "smart tourism" to promote their brands and images. At present, many technologies are available to be applied to the management and marketing of the tourism industry, and this is projected to have a significant impact on future development of the industry.

### Tourism Related Mobile Apps of Macao Government Tourism Office



What's On, Macao



Step Out, Macao



Experience Macao

### Mobile Apps provided by other insitutions of Macao



Macao Cultural and Creative Map



Macao International Airport Mobile Flight Information Display System



Macao Sailings



Macao MICE



Traffic Information



## 2. Baseline Analysis And Challenges

### TOURISM QUALITY AND SERVICE

#### Current Status

Visitor's quest for travel experience and quality has become a trend. Visitors are becoming increasingly experienced and quality savvy, not only demanding for reasonable pricing.

Findings from the "Visitor Satisfaction Survey" indicate a drop in overall visitor satisfaction in 2015 compared with the equivalents over the past 5 years. Specifically, visitor satisfaction of MICE ranked the highest, while the visitor satisfaction of world cultural heritage scenic spots presented a decreasing trend.

According to the complaint statistics of 2014 and 2015, the most mentioned topics are transportation, illegal accommodation and tour guides.

#### Challenges

- Quality tourism is key to underpinning the success of a destination. Although Macao provides various tourism products for its visitors to choose from, the boom of rivals in nearby regions plus the internationalization of tourism developments have generated considerable external pressure on the city. Macao therefore needs to further improve its service quality and awareness to sustain competitiveness.
- As the city's goal is to become the "World Centre of Tourism and Leisure", Macao should provide comprehensive quality services covering areas of immigration, sight-seeing, retail, hospitality, transportation, and dining, etc.
- Human resources are the core enabler for sustainable tourism growth. However, given the limited human resources, Macao relies heavily on non-resident workers.



# REGIONAL TOURISM COOPERATION

## Current Status

Under regional cooperation, with the current cooperation frameworks like Pan Pearl River Delta, Hong Kong/Macao, Guangdong/Hong Kong/Macao, Guangdong/Macao and Fujian/Macao, tourism cooperation focuses mainly on areas of joint promotion, industry management, and tourism products.

Macao has proactively established mutually beneficial cooperation with regional partners. Measures include developing regional integrated tourism routes and building a unique regional tourism brand. Additionally, joint booths in major trade shows for common target markets, “Multi-destination trip” promotions and industry trade exchange in tourism source markets.

On international level, Macao has also proactively taken part in many activities and conferences held by international organizations, namely, the United Nations World Tourism Organization, Pacific Asia Travel Association, World Tourism Cities Federation, Asia Pacific Economic Cooperation Tourism Working Group, etc., to continuously enhance its presence in the world tourism industry.

## Challenges

- As the “multi-destination trip” initiative involves various destinations’ products, overall coordination and service quality is need to be assured.
- Portuguese is one of the official languages of Macao, therefore the city has a unique cultural atmosphere compared with other cities in mainland China. Along with the city’s world heritage, Macao has an advantage to become a unique tourism destination in the region.
- With the completion of the Hong Kong – Zhuhai – Macao Bridge and the New Border Crossing Facility, the original cooperative mechanism among cities should be adjusted accordingly.





## 2. Baseline Analysis And Challenges

### CITY DEVELOPMENT

#### Current Status

Macao has a total land area of 30.4 km<sup>2</sup>, the 30 million visitors per annum have a significant impact on the overall urban environment of the city.

Coordinated planning is required by all means to ensure a quality living environment for residents and an enjoyable experience for visitors. Tourism carrying capacity can be improved through various opportunities identified in urban renewal and new town development.

#### Challenges

- Due to land scarcity, the population density of Macao is as high as 21,100 persons/km<sup>2</sup>. Therefore, the limited city space has generated constraints on the renovation and expansion of tourism facilities. In the meantime, some of the historical districts are overcrowded.
- Given the under-utilization of waterfront resources, there is room for development in this area.
- Macao has a large number of old districts and traditionally constructed buildings. Urban regeneration is required to enhance the landscape and utilization of space.
- A holistic master plan is needed to guide the sustainable development of Macao, with support from all sectors of society, a better homeland can be built.



## TRANSPORTATION AND ACCESSIBILITY

### Current Status

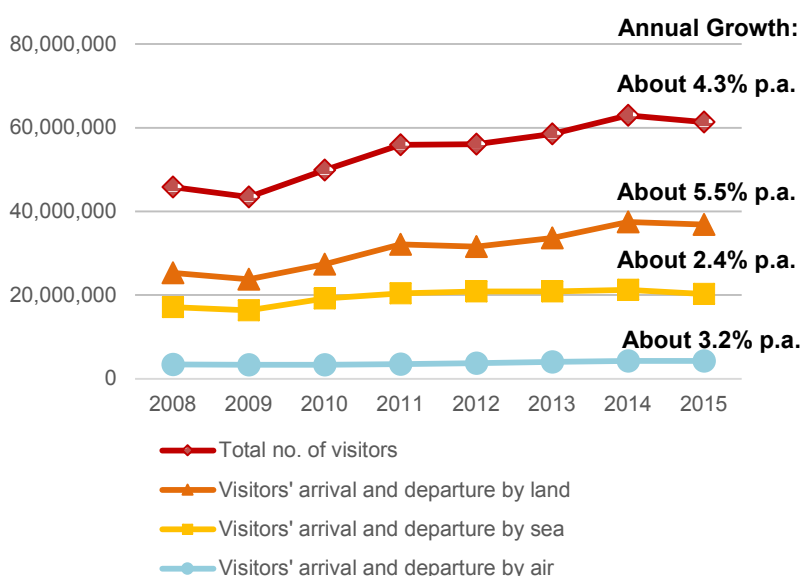
The average annual growth rate of visitation to Macao was 4.3% from 2008 to 2015. The most popular mode of transport for visitor arrivals and departure is by land, while by air recorded the lowest proportion.

Accessibility between cities and transportation within the city are major elements influencing the overall travel experience. An organized transport network and system would be required to create a quality living environment.

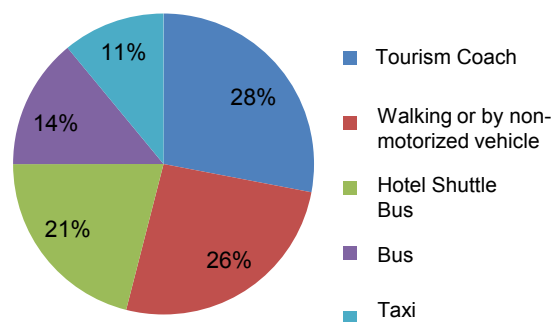
### Challenges

- In 2014, the Macao International Airport has recorded a utilization rate of 91% with air routes connecting to 37 cities (mainly cities in Mainland China). With rising levels of visitation, the airport is now facing capacity challenges.
- Most visitors choose tour buses and walking or by non-motorized vehicle to visit the city. They also prefer the shuttle buses operated by the hotels. However, the average daily utilization of shuttle buses is merely 33%, these have been identified as a main generator of road congestion in Macao.
- According to statistics from the tourism hotline, complaints related to public transportation in Macao occupied 42% of total cases received, among which 87% were taxi issues. Therefore, public transportation in Macao needs improvement.

**Visitors' Arrival and Departure by Mode of Transport (2008-2015)**



**Utilization of Different Modes of Transport by Visitors**









The background of the page is a photograph of a large, multi-jet fountain at night, illuminated with bright orange light. The water jets are high and create a dense, fan-like shape. In the foreground, a group of people are silhouetted against the bright light of the fountain, looking up and taking photos. A bridge with white railings is visible in the middle ground.

### **3. Guiding Principles Of The Tourism Industry Master Plan**



### 3. Guiding Principles Of The Tourism Industry Master Plan

After a thorough comprehension of existing resources, development opportunities, constraints and challenges, together in realizing the vision of “World Centre of Tourism and Leisure” and in ensuring demands for a livable and travel friendly city are met, the Macao Tourism Industry Development Master Plan has suggested the following guiding principles which served as the basis in confirming the overall goals and formulating the development strategies for Macao’s future tourism industry.



#### Comprehensive Industry of Leisure Tourism

Comprehensive Industry of Leisure Tourism – offering diversified products and experiences for a wide variety of visitors, broadening visitor source markets. Riding on the growth of non-gaming products, a variety of entertainment facilities and leisure activities can be introduced, thereby encouraging the development of a multi-day tourism destination. Also, there is an opportunity to attract high-value visitors by upgrading the overall travel experience.



#### Quality Tourism

Quality Tourism – training provision and continuous management of the tourism industry can upgrade the overall service quality. This can help to promote the industry to meet international standards. The investment and construction of various integrated resort facilities is an opportunity to maintain and improve the quality of tourism products.



#### Cultural Tourism

Cultural Tourism – to elaborate the uniqueness of Macao’s history and culture, as well as to create a culturally diverse destination with rich content. Continue to nurture the city’s culturally diverse and rich tourism experience will attract the worldwide audience and nurturing development of the creative industries of the city.











## 4. Goals And Strategies



## 4. Goals and Strategies

For Macao to achieve the vision of World Centre of Tourism and Leisure, four overall goals have been identified as instrumental to fulfilling this vision. Each overall goal is supported by different strategies and measures with a timeline to guide the pathway to success. The timeline of 0-5 years is considered as short term measures, 5-10 years as medium term, while time spans above 10 years is considered as long term measures.

### GOAL 1 – MANAGE SUSTAINABLE FUTURE GROWTH OF THE TOURISM INDUSTRY

The rapid growth of tourism has generated opportunities and economic benefits for Macao, but has significantly strained the city's resources and impacted the quality of life. Therefore, managing tourism growth in a sustainable way to improve the livelihood of its residents is an important goal in developing Macao as the "World Centre of Tourism and Leisure".

#### Strategy 1: Encourage Resident Engagement and Involvement in the Development of the Tourism Industry

Resident engagement plays an important role in many world tourism cities. To ensure a continuous support of the tourism industry from the residents, it is critical to fully understand the residents' thoughts on the tourism industry and its development direction. Creating a win-win situation is vital to success.

##### Short term measures:

- Continue with in-depth development of the Macao Awareness Campaign, helping residents to further understand and familiarize themselves with the tourism industry development of Macao, providing positive tourism information to the general public.
- Encourage local associations to organize community culture, history and other tourism related events, further excavating the hidden tourism resources of the city.
- Strengthen communications among tourism related government departments, tourism industries and residents. This ensures a coordinated development between the livelihood of residents and visitors' travelling experiences.

#### Strategy 2: Manage Tourism Development and Increase Overall Capacity to Receive Visitors

A vital strategy is to make Macao a livable city and a world class quality tourism destination by encouraging proper tourism behavior, managing negative tourism impacts, and increasing carrying capacity which benefits both residents and tourists. This serves as one of the most critical strategies in promoting Macao to be a livable city and a world-class destination. The current economic adjustment period is the best time for the city to step back and rethink visitation and an ideal growth model for the city.

##### Short term measure:

- Evaluate the various impacts on society and residents under different visitor growth scenarios, including measures to cope up with the carrying capacity constraints. Implement a crowd reporting system in tourist hotspots.

##### Medium term measure:

- Upgrade the amenities of all cross border facilities, supporting facilities of tourist hotspots (including transport, public space and shopping areas) and other visitor spaces through coordinated urban planning, thus improving tourism carrying capacity.



### Strategy 3: Improve Environmental Standards of the Tourism Industry

Improvement of environmental standards through integrated and coordinated planning helps to maintain sustainable development of the tourism industry and the city as a whole. Developing measures to reduce negative environmental impacts generated by the tourism industry will ensure Macao's development as a livable green city and travel destination.

#### Short term measure:

- Further promote the Green Hotel Award and development of green hotels, also coordinating with other government departments, to encourage the hotel industry to minimize the production of light pollution, wastewater and solid waste. This can foster greater environmental protection in the city.

#### Medium term measures:

- Study upgrading hotel architectural codes and guidelines to ensure environmental protection with related departments, promoting green buildings and implementing strict control over the creation of light pollution, wastewater and solid waste, as well as energy efficiency for future hotel projects.
- Raise environmental standards for vehicles in the tourism industry.

### Strategy 4: Regional Seamless Transportation

Hong Kong International Airport (HKIA) has the strong advantage of being well-connected to many other airports around the world, hence providing seamless connection to the HKIA will help attract more medium to long haul visitors to Macao. Aside from the existing Skypiers in HKIA, the soon to be completed Hong Kong-Zhuhai-Macao (HKZM) Bridge can be used to connect HKIA and Macao, allowing visitors to arrive in Macao directly. Furthermore, regional infrastructure can be tapped into to improve Macao's connectivity with nearby cities.

#### Short term measures:

- Explore the possibility of connecting HKIA to Macao via the new infrastructural opportunity of HKZM Bridge between the two cities. This would improve convenience for medium and long haul visitors travelling to Macao.
- Connect the Pearl River Delta and other Mainland Chinese cities through high speed railway networks. This provides a convenient, safe and efficient commuting mode for visitors.

#### Medium term measures:

- Further enhance the connection between Hong Kong, Macao and Zhuhai airports.
- Improve convenience for visitors travelling on railways through easy ticketing and customs clearance by coordinating with related departments in Mainland China.



## 4. Goals and Strategies

### GOAL 2 : DIVERSIFY TOURISM PRODUCTS

World class destinations have a diversity of tourism products, accommodation options, cultural facilities, retail shops, and various festivities events. Macao needs to offer a diversified and attractive tourism product mix and experience.



#### Strategy 1: Developing Iconic Tourism Products

Pocket spaces and new tourism areas can be identified in city regeneration and future new town areas. Distinctive and unique tourism facilities and activities can be introduced, these include developing a family entertainment center, an iconic cultural center and exhibition hall, as well as hosting sports competitions or biennale events. This can enhance the tourism product diversity of Macao as a way to improve the city's competitiveness and further tap into high value markets. At the same time, the diverting of visitors to different areas of the city can alleviate existing problems of over-crowding and traffic congestion in the historic centre of the city, bringing about balanced economic development for Macao.

##### Short term measures:

- Implement the planning-in-progress new tourism products or branded activities, including the renovation of the Grand Prix Museum, hosting of the International Film Festival, creation of the Gourmet Capital, and optimization of the Macao Light Show. In the process of developing these tourism products, there is opportunity to showcase the unique cultural diversity of the city, and together with gourmet, cultural creativity and sports elements, increase the city's tourism appeal.
- As part of the "Step Out, Experience Macao's Communities", local communities and the private sector can work together in identifying new elements of community tourism, discovering new products that

fit with the character of the area and seek a suitable market positioning, in order to create a new tourism image for the city.

- Continual hosting of cultural performances at tourist attractions, showcasing the authentic landscape of Macao, such as the Temple and Church Promotional Campaign, Pedicab Promotional Campaign, Weekend Cultural Performances, etc.

##### Medium term measures:

- Establish a continual roll out of various interesting activities such as Dining in the Sky, Dining on the Sea or other city/ rural adventures. This will improve the overall attractiveness of Macao as a vibrant tourism city.
- Investigate the possibility of hosting international sports events with regional cities. This will utilize Macao's existing sports facilities and venues, and in turn promote sports tourism.
- Encourage and support the construction of international theme park in Macao.

## Strategy 2: Creating New Waterfront Areas

Most world-class tourism destinations provide a quality waterfront environment. In Macao, a peninsular, waterfront areas are abundant. These waterfront areas can be used to construct waterfront parks, public arts spaces, alfresco dining, or an iconic cultural hub. New waterfront areas can be jointly enjoyed by residents and tourists as public open spaces close to the water, strengthening Macao's unique city image.

### Short term measure:

- By utilizing the ship-building industrial heritage and the stilt houses, the Coloane Lychee Bowl area can be rejuvenated into a leisure waterfront, opening waterfront spaces to residents and visitors alike to enjoy and relax. Apart from being used as workshop space for ship-building, mega-scale ship-building shops can be transformed into performance venues to showcase the glory of the ship-building industry of Macao, developing Coloane Lychee Bowl area as an active seafront district, inheriting the essence of the local traditional ship-building industry. The old industrial site can be transformed into an art exhibition hall which introduces the history of Macao's ship-building industry. Together with the Coloane Pier, island tourism can thus be developed.

### Medium term measure:

- Transform the Inner Harbor Area into a vibrant waterfront with retail, alfresco dining and a commercial waterfront district. The Inner Harbor Area was once the most vibrant district in the city which encompassed the functions of cargo ships, fishing boats and passenger ferries all in one place. Today some of these functions are still maintained. Through rejuvenating the area, existing storage areas can be converted into retail, food and beverage uses, further developing into a rich tourism area.

### Long term measures:

- Develop the southern part of New Town Area A into a cultural waterfront corridor, with an iconic landmark structure being the future gateway of Macao. Cultural facilities that meet international standards such as an Opera House, Cultural Centre, performance and exhibition venues can also be developed.
- New Town Area B will have institutions, green belt waterfront, as well as exhibition venues and related facilities. This area could develop a waterfront area with passive and quiet public space for residents and visitors to relax.

## Strategy 3: Introducing Marine Tourism Products

The newly established water boundary for the Macao Special Administrative Region has provided a strong foundation for the development of marine tourism products for the city. The development of waterfront areas and marine tourism related entertainment and leisure facilities can enrich Macao as the World Centre of Tourism and Leisure. This can help to attract visitors with different interests and hobbies, as well as provide a variety of cultural and entertainment options for residents.

### Short term measures:

- Utilizing marine sightseeing resources to launch a tourism route on the sea, using marine tourism activities to promote connections between the Macao Peninsular and neighbour islands.
- Expand the development of yachting tourism, promoting the "free and easy yacht travel" with different Mainland Chinese cities, combining with marine tourism resources to develop Macao as the Centre of Yachting Tourism.

### Medium term measures:

- Further develop water sports such as dragon boat, sailing, kayaking, canoeing and other water sports, together with the building of related facilities to allow for the organization of various water sports competitions. With the integration of tourism, this will attract regional and even international sports enthusiasts to Macao.
- Cooperate with nearby cities in the area to develop island tours.

### Long term measure:

- Through the comprehensive development of marine tourism products, Macao will be developed into the core city of short haul multi-destination trips within the Pearl River Delta Region. International visitors can access nearby cities conveniently via Macao, stimulating regional cooperation ties.





## 4. Goals and Strategies

### GOAL 3: ATTRACT HIGH VALUE VISITOR MARKET

Growing international and Asian visitors present great opportunities for Macao in broadening source markets and diversifying products, including attracting business travel, MICE and other high value visitors. Smart tourism will also be fostered to enhance visitors' convenience.

#### Strategy 1:

##### Developing Macao into a Multi-Day Destination

Macao possesses a unique world cultural heritage, cultural characteristics, natural environment and world-class facilities. The city can provide a range of tourism products, including integrated resorts, cultural, sports, ecological, entertainment, technological, themed travel and other tourism products. Existing and new experiences can be highlighted to further enhance Macao's image as a multi-day destination, extending visitors' length of stay in Macao.

#### Short term measures:

- Encourage longer stays in Macao by offering rich experiences involving appreciation of the city's uniqueness, such as various types of intangible cultural heritage workshops and gourmet culture experiences.
- With the total MICE space in Macao expanding to 210,000 square meters by 2020, large scale venues can leverage their strengths to seek out opportunities to host more international, large scale and regular events in Macao, such as the International Film Festival, gourmet culture, and sports related events.
- Utilize information technology, cooperating with local partners to create innovative travel itineraries.
- Utilize new tourism products and plans, jointly cooperating with international and Asian strategic partners to develop tourism markets and promote Macao as a multi-day destination.

#### Strategy 2:

##### Continuing the Development of High-Potential Target Segments

This includes formulating promotional strategies for target segments including young adults, silver hair, affluent and family segments, as well as expanding markets including Asia, Europe, America, Australia and New Zealand, etc. Creating new tourism product offerings for the abovementioned target segments and intensifying international promotion will help to increase the number of overnight visitors

#### Short term measures:

- Young Adult segment: Tapping on the development of the local cultural creative industries, these cultural creative zones result in young adults wanting to familiarize themselves with and explore Macao. These zones typically involve the selling of local designer brands and products in a flea market style. Different types of experiential camps and workshops allow young adults to understand Macao's culture, satisfying their demands for in-depth urban travel. The building of affordable accommodation encourages young adults to extend their length of stay. On the promotional side, Macao's unique blend of East and West culture will be most attractive to European and American source markets. The invitation of overseas famous bloggers and writers to participate in local events and write relevant stories will be an effective promotional strategy for this target segment.
- Silver Hair segment: Seeing the development of the Guangdong – Macao Traditional Chinese Medicine Technology Industrial Park (GMTCM Park) as an opportunity, Macao will be developed into a health and wellness tourism destination. Integrated resorts could provide wellness tourism products and organize Tai Chi or health related activities, attracting the silver hair segment with leisure and wellness tourism facilities. Taking advantage of the development of the GMTCM Park invested by the Macao SAR Government, the promotion of health and wellness tourism will be launched and eventually extended to nearby regions.
- Affluent segment: Inviting world famous performances and shows to Macao, together with the opening of world famous high-end restaurants in the city can attract high value visitors to Macao to enjoy the different world-class facilities. Meanwhile, Macao's world cultural heritage and world class facilities can attract high value visitors from long haul source markets, such as the Middle East, Europe, America, Australia and New Zealand, etc. Additionally, the "free and easy yacht travel" will also attract high value visitors from Mainland China.
- Family segment: The introduction of different new tourism products, such as marine tourism, sports, ecological, entertainment and theme park facilities will help attract family visitors from Asia. On the promotional side, family packages which comprise of tickets for product offerings from both public and private sectors

will be promoted. Examples include the existing Panda Pavilion, marine tours, cultural creative industries experiential camps and family oriented facilities in integrated resorts, all of which attract family visitors.

**Medium term measures:**

- Young Adult segment: Organize competitions and exhibitions relating to Macao, in particular attracting young adults to visit Macao through the cultural creative industries.
- Silver Hair segment: Work with famous health and wellness tourism destinations in Asia in formulating development strategies.
- Affluent segment: Upgrade infrastructure facilities and service quality, such as increasing the number of parking spaces for private jets.
- Family segment: Attract more family visitors through family oriented facilities.



**Strategy 3:  
Developing Smart Tourism Through Innovative Technology**

With the market for independent travelers and their spending power growing rapidly, leveraging creative technology and online marketing to provide visitors with first hand tourism information results in visitors having a deeper impression of Macao as a tourism destination. Enhancing technological infrastructure and data sharing, providing visitors with integrated tourism information upon their arrival, leads to an enhanced tourism experience for visitors throughout their trip. During the trip or when the trip ends, visitors can provide their reviews and share their travel experiences through social media. This in turn contributes to the promotion of Macao as a tourism city.

**Short term measures:**

- A well-integrated website and mobile application can provide visitors with events, accommodation, reservations and other information at the trip planning stage.
- As part of the establishment of Smart Tourism, effective and efficient city-wide WiFi coverage allows greater convenience for visitors.

**Medium term measures:**

- To accommodate the development of the Big Data Plan of the Macao SAR Government, the collection and analysis of visitor behavior information will be used to develop a livable and convenient Smart City.
- Beyond the provision of convenience through smart tourism to visitors within Macao, smart tourism services can be co-developed with strategic partners at the regional and international level, which will improve the overall competitiveness of the city.

**Strategy 4:  
Jointly Developing Strategic Tourism Products with Nearby Cities**

Macao can work with other cities that have close connections in the form of joint promotions. The combination of different unique features among regional cities can be a powerful draw. World cultural heritage, traditional cultural experiences or island tours can be new directions for formulating regional marketing strategies.

**Short term measure:**

- Identify and utilize Macao's competitive advantage as a World Heritage Site and integrated resort facilities, becoming proactive in forming strategic partnerships with nearby cities to promote regional tourism development.

**Medium term measure:**

- With Macao's unique culture and rapid development of the creative industries, strategic partnerships can be extended to other international tourism destinations, to foster Macao's position as a world class tourism city.



## 4. Goals and Strategies

### GOAL 4: IMPROVE TOURISM QUALITY

Industry professionals and related tourism industry personnel are critically important for the success of the tourism industry. Macao needs to continuously improve its service quality and efficiency. The provision of world standard services and convenience will be required to make itself a world-class tourist destination.



#### Strategy 1: Maintaining Continual Skills Training

There is a need to promote the concept of upward mobility to different tourism sectors' personnel. Employers, businesses and the government have a role in further emphasizing the importance of career planning for residents engaged in the tourism industry. Continual skills training can allow residents devoted to the tourism industry to contribute to the development of Macao as a world class tourism destination.

##### Short term measure:

- Support career planning and skills development with convenient learning tools, and also improve foreign language skills of residents engaged in the tourism industry. It is critical to highlight the importance of upward mobility and how they can contribute to developing Macao as a world class tourism destination.

##### Medium term measure:

- Explore the possibility of international development training programs amongst world famous tourism destinations. Such programs will allow residents to broaden their views internationally and subsequently support their career development.

#### Strategy 2: Establishing an Integrated Tourism Quality System

A Tourism Quality Service System should integrate various aspects of the industry with the end goal of achieving tourist satisfaction throughout their entire journey. The various aspects include customs clearance, transport, food and beverage, entertainment, accommodation and others. The key dimensions for implementation of a tourism quality system include the integration of both software and hardware. In addition, other areas like safety and security, quality of life, environmental cleanliness and hygiene in Macao should be considered.

##### Short term measure:

- After consolidating the requirements and standards of tourism related industries, different government departments will work with the industries to discuss in-depth about the corresponding service standards for the tourism industry and other related service industries. The quality standards of frontline service providers and customer service staff should be a top priority.

##### Medium term measure:

- Work with the industry and different government departments to jointly establish an integrated quality system.



### Strategy 3: Elevating Tourism Service Quality to Align with International Standards

For the continuous promotion of Quality Tourism, the current Quality Tourism Services Accreditation Scheme (QTSAS) launched by Macao Government Tourism Office will extend across various aspects of the industry, allowing more diverse local trade to benefit from the Scheme. In the long term, aligning Macao's tourism quality standards with other internationally recognized accreditation systems will encourage industry players to provide quality service at all times. This will strengthen Macao's image as an international tourist city, bringing Macao closer towards its vision of "World Centre of Tourism and Leisure".

#### Short term measure:

- Broaden and intensify the content of different training programs, including regular communication with the tourism industry, local and overseas training institutions, to understand the latest industry updates and training trends. Through assessment and evaluation of training programs, optimization of training materials and quality of training, its effectiveness can be ensured.

#### Medium term measure:

- Through feasibility studies, to extend the QTSAS to more tourism related sectors .

#### Long term measure:

- Promote tourism service quality to align with international standards.



**星級旅遊服務認可計劃**  
Programa de Avaliação de Serviços Turísticos de Qualidade  
Quality Tourism Services Accreditation Scheme









## 5. Scenario Forecasts And Evaluation



## 5. Scenario Forecasts and Evaluation

The drafting and formulation of the Macao Tourism Industry Development Master Plan is developed based on a scientific and precise methodology. This study has prepared two forecast scenarios for 2025, which includes projections for total visitor arrivals, non-gaming tourism receipts, average length of stay of overnight visitors (in days), percentage of overnight stay, number of hotel rooms, tourism related employment and hotel occupancy rates.

As time progresses, the development direction of tourism in Macao may change based on the objective environment, overall policy of the Macao SAR Government, economic policies and trends in other countries, competitiveness of nearby tourism destinations, exchange rates and other factors. Thus, the proposed overall goals, strategies and measures need to be reviewed regularly and adjusted when appropriate. Additionally, the extent of implementation and execution of suggested measures relies on the participation and collaboration between the Government, the industry and residents, which will then propel the tourism industry to develop towards the target strategies as suggested in the Master Plan.

	2015	Low Visitor Growth Scenario Year 2025 Estimate	Modest Visitor Growth Scenario Year 2025 Estimate
<b>Total Visitor Arrivals</b>	30.7 million	33 to 35 million (1%-2% visitor growth per annum)	38 to 40 million (3%-5% visitor growth per annum)
<b>Non-Gaming Tourism Receipts</b>	USD 6.4 billion	USD 12 to 13 billion	USD 13 to 14 billion
<b>Average Length of Stay of Overnight Visitors</b>	2.1 Days	2.3 Days	2.3 Days
<b>Percentage of Overnight Stay</b>	46.6%	56%	53%
<b>Hotel Rooms</b>	33,047	48,602	51,500
<b>Tourism Related Employment*</b>	233,000	281,000	321,000
<b>Hotel Average Occupancy Rate</b>	80.5%	82%	84%

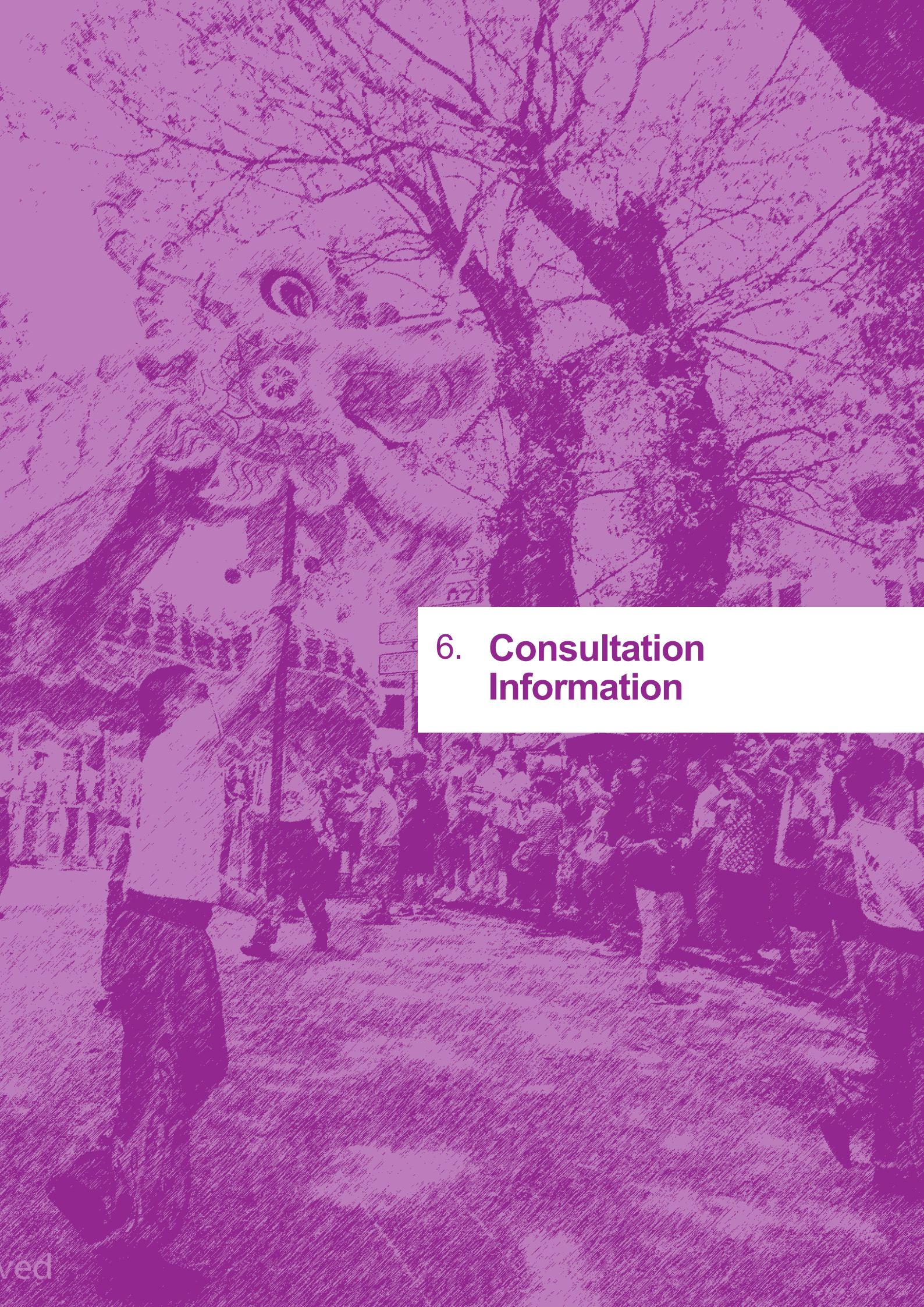
\*Tourism related employment figures include non-resident workers who do not live in Macao











## 6. Consultation Information



## 6. Consultation Information

### Consultation Sessions:

Date	Time	Venue	Language
28 <sup>th</sup> May 2016 (Sat)	3pm	Tourism Activity Centre 2/F, No 431, Rua Luis Gonzaga Gomes, Macau	Cantonese (Provides Portuguese and English simultaneous interpretation)
11 <sup>th</sup> June 2016 (Sat)			

### Exchange Sessions (Industry and Organization):


Date	Target
18 <sup>th</sup> June 2016 (Sat)	Industry and Professional Organizations
9 <sup>th</sup> July 2016 (Sat)	


During the consultation period, there are special sessions with the tourism related advisory committees to listen and collect their opinions.


### Roadshows:

	Location	Period
1	Leal Senado Square	May 26 – Jun 16, 2016 Jun 23 – Jul 22, 2016
2	Open area adjacent to Garden of Flower City, Taipa (near Rua de Seng Tou)	May 23 – Jun 4, 2016
3	Iao Hon Market Garden	Jun 5 – Jun 15, 2016
4	Tap Seac Square	Jun 16 – Jun 27, 2016
5	Rotunda Carlos da Maia (Three Lamps District)	Jun 28 – Jul 8, 2016
6	Sintra Plaza	Jul 9 – Jul 22, 2016

Please return the comment form to Macao Government Tourism Office on or before 22<sup>nd</sup> July 2016 via the following methods:

 Alameda Dr. Carlos d'Assumpção, n.ºs 335-341, Edifício "Hot Line",  
12º andar, Macau

 2831 5566

 2837 2446

 masterplan@macaotourism.gov.mo

 <http://masterplan.macaotourism.gov.mo>

Consultation booklet can be downloaded via the website  
<http://masterplan.macaotourism.gov.mo>, or can be collected in the following locations:

Location	
Macao Government Tourism Office	Alameda Dr. Carlos d'Assumpção, n.ºs 335-341, Edifício "Hot Line", 12º andar, Macau
MGTO Tourist Information	Largo do Senado, n.º 9, Macau (Ritz Building), Outer Harbour Ferry Terminal, Border Gate, Macao International Airport, Taipa Temporary Ferry Terminal
RAEM Service Centre	Rua Nova da Areia Preta, n.º 52, Macau
Public Services Centre	Rua do Campo, n.ºs 188-198, Vicky Plaza
Major Public Libraries	

For information enquiry:  
Tel: 2831 5566  
Website: <http://masterplan.macaotourism.gov.mo>



**We welcome your comments on the consultation from all of you!**







## 7. Public Consultation Comment Form



## 7. Public Consultation Comment Form

**For a better “Macao Tourism Industry Development Master Plan”, your comments and suggestions are valuable to us!**

Suggestions and comments to “Macao Tourism Industry Development Master Plan”:

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Suggestions and comments to the Overall Goals of the Master Plan:

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Suggestions and comments to the Guiding Principles:

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# 7. Public Consultation Comment Form

**For a better “Macao Tourism Industry Development Master Plan”, your comments and suggestions are valuable to us!**

## **GOAL 1 – MANAGE SUSTAINABLE FUTURE GROWTH OF THE TOURISM INDUSTRY**

Suggestions and comments to Goal 1: Manage Sustainable Future Growth of the Tourism Industry:

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Suggestions and comments to “Encourage Resident Engagement and Involvement in the Development of the Tourism Industry”:

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Suggestions and comments to “Manage Tourism Development and Increase Overall Capacity to Receive Visitors”:

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Suggestions and comments to “Improve Environmental Standards of the Tourism Industry”:

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Suggestions and comments to “Regional Seamless Transportation”:

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# 7. Public Consultation Comment Form

For a better “Macao Tourism Industry Development Master Plan”, your comments and suggestions are valuable to us!

## GOAL 2 – DIVERSIFY TOURISM PRODUCTS

Suggestions and comments to Goal 2: Diversify Tourism Products:

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Suggestions and comments to “Developing Iconic Tourism Products”:

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Suggestions and comments to “Creating New Waterfront Areas”:

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Suggestions and comments to “Introducing Marine Tourism Products”:

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# 7. Public Consultation Comment Form

For a better “Macao Tourism Industry Development Master Plan”, your comments and suggestions are valuable to us!

## GOAL 3: ATTRACT HIGH VALUE VISITOR MARKET

Suggestions and comments to Goal 3: Attract High Value Visitor Market:

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Suggestions and comments to “Developing Macao into a Multi-Day Destination”:

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Suggestions and comments to “Continuing the Development of High-Potential Target Segments”:

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Suggestions and comments to “Developing Smart Tourism Through Innovative Technology”:

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Suggestions and comments to “Jointly Developing Strategic Tourism Products with Nearby Cities”:

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# 7. Public Consultation Comment Form

For a better “Macao Tourism Industry Development Master Plan”, your comments and suggestions are valuable to us!

## GOAL 4: IMPROVE TOURISM QUALITY

Suggestions and comments to Goal 4: Improve Tourism Quality:

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Suggestions and comments to “Maintaining Continual Skills Training”:

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Suggestions and comments to “Establishing an Integrated Tourism Quality System”:

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Suggestions and comments to “Elevating Tourism Service Quality to Align with International Standards”:

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## 7. Public Consultation Comment Form

**For a better “Macao Tourism Industry Development Master Plan”, your comments and suggestions are valuable to us!**

Other comments and suggestions:



## DISCLAIMER:

Any comments and suggestions collected in this public consultation may be used in the consultation summary report and final report of the research study of “Macau Tourism Industry Development Master Plan”. MGTO will respect anyone who requests confidentiality of personal information and all/part of the comments. In the case that commenters have no confidentiality requirements, their views and personal information provided may be disclosed.

### PERSONAL INFORMATION (OPTIONAL)

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Name/Organization:

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Contact Details:

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Do you agree to be contacted for further opinions (if necessary) ☐ YES ☐ NO

I / Organization request(s) for confidentiality on (if applicable):

☐ Personal information

☐ Comments provided, please state:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Thank you for taking time to provide your views, the consultation summary report will be released in the MGTO website (<http://industry.macaotourism.gov.mo>) within the set time period under the “Public Policy on Consultation and Planning Guidance”.



澳門特別行政區政府旅遊局  
DIRECÇÃO DOS SERVIÇOS DE TURISMO