

澳門旅遊業發展總體規劃

Macao Tourism Industry Development Master Plan

Review Report



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

November 2021





Macao Tourism Industry Development Master Plan

Review Report



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



止痛藥！

上血夾！

鐘錶



土耳

Preface

Tourism has always been the pillar industry of Macao. Since the founding of the Macao Special Administrative Region (Macao SAR), the Central Government of China has vigorously supported the development of Macao. Especially in recent years, Macao tourism industry has been constantly improved in infrastructure, policy support, industry environment and scale, and other aspects.

In order to cope with Macao SAR Government to realize the vision of building a “World Centre of Tourism and Leisure”, Macao Government Tourism Office (MGTO) began studying and drafting the *Macao Tourism Industry Master Plan* (hereinafter referred to as the “*Master Plan*”) in 2015, laying the foundation and path for the development of Macao tourism industry in the following 15 years. Officially published in 2017, the *Master Plan* puts forward eight key objectives, 29 planning proposals, 91 action plans for the short term, medium term, and long term. In accordance with the objectives and strategies set by the *Master Plan*, the MGTO cooperates with government departments and the industry to carry out various tasks.

The guidance from the national policies and planning, the resource integration opportunity brought by MGTO moved under the tutelage of the Secretariat for Economy and Finance, and the changes in travel environment and the way people travel caused by the pandemic all contributed to the changes in both the internal and external environment of Macao tourism industry. Meanwhile, the *Master Plan* has also proposed an evaluation mechanism to make timely adjustments to the objectives and action proposals. Therefore, in the fifth year since the publication of the *Master Plan*, the MGTO, apart from the regular annual review, organizes a professional team to review the implementation of the objectives, strategies, and planning proposals over the past five years in a scientific and systematic manner, and to make appropriate revisions and renewals if necessary.

The review mainly covers the following four aspects:

- 1) Review and analysis of the situation of Macao’s tourism development;
- 2) Review of implementation status between 2016 and 2020;
- 3) Deepening of five key issues;
- 4) Addition or deletion and revision of the action plans and key indicators.

The review report also proposes the key tasks for the development of Macao tourism industry from 2021 to 2030, ensuring that they are in conformity with the principles of the development plan and urban planning of Macao SAR Government for the following years, promote sustainable and diversified development of Macao tourism, and build Macao as a happy, smart, sustainable, and resilient city.

With the gradual recovery in the post-pandemic era, Macao enters a new stage in the tourism development. In the next decade, while deepening the implementation of objectives set by the *Master Plan*, action plans will be improved, regularly tracked, reviewed and revised in order to respond to the ever-changing external environment and visitor situation, and better support Macao SAR Government to build the city into a “World Centre of Tourism and Leisure”.

Table of Contents

1.	Review Background and Analysis of Current Situation	8
2.	Study Process	14
3.	Implementation Review and Analysis	18
4.	Deepening of Key Issues	30
	— Contribution of Tourism to the Economy	32
	— Regional Tourism Cooperation	34
	— Tourism Carrying Capacity	36
	— Diversification of Visitor Source Markets	38
	— Smart Tourism Led by Science and Technology.....	40
5.	Plan Review and Revision	42
6.	Review and Revision of Growth Scenarios and Key Indicators	52
7.	Conclusion and Prospect	54



1. Review Background and Analysis of Current Situation

Review Background

National and Regional Policies Boost the Prosperity of Macao Tourism Industry

From the “Twelfth Five-Year Plan” to the “Fourteenth Five-Year Plan”, the Development and Positioning of Macao Tourism Industry Becomes Clearer

In 2011, the Central Government proposed for the first time in the “Twelfth Five-Year Plan” to support Macao in building the “World Centre of Tourism and Leisure”. The plan speeds up the development of leisure and tourism, meetings, incentives, conferences and exhibitions (MICE), Chinese medicine, educational services, cultural and creative industries, and other emerging industries, to promote moderate economic diversification.

In 2021, the Central Government emphasized the support for Macao to enrich the connotation of the “World Centre of Tourism and Leisure” in the “Fourteenth Five-Year Plan”, which deepens cooperation among Guangdong, Hong Kong and Macao and the international and regional cooperation under the “Belt and Road” initiative, marking the development positioning of the “World Centre of Tourism and Leisure”.

The Establishment of the Guangdong-Hong Kong-Macao Greater Bay Area Brings New Opportunities for Macao Tourism Industry

In 2019, the Central Government issued the *Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area*, in which Macao was named as one of the four core cities in the Greater Bay Area. In terms of regional culture and tourism cooperation, the Outline provides a new direction and goal for Macao to build itself into the World Centre of Tourism and Leisure.

In the same year, the State Council issued the *Construction Plan for Hengqin International Recreation Island*, which would promote moderately diversified economic development of Macao. As a demonstration area on the in-depth cooperation among Guangdong, Hong Kong, and Macao, Hengqin International Recreation Island will accelerate the integrated development of tourism in the Greater Bay Area.

In 2021, the *Culture and Tourism Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area* and the *Master Plan of the Development of the Guangdong-Macao Intensive Cooperation Zone in Hengqin* were issued, which proposes to further deepen the regional exchanges and cooperation on tourism in Hengqin and the Greater Bay Area, and build a quality living circle suitable for residence, work, and travel.



Review Background

The Macao SAR Government and Other Departments Are Committed to Build Macao into a World Centre of Tourism and Leisure

To achieve the vision of becoming the “World Centre of Tourism and Leisure”, the Macao SAR Government drafted the *Five-Year Development Plan for the Macao Special Administrative Region (2016-2020)*, and established the city’s gradual formation of business environment for tourism and leisure industries as one of the overall goals.

The draft of *Urban Master Plan for Macao SAR (2020-2040)*, published in 2020, proposed to promote the sustainable development of tourism by optimizing and balancing the spatial layout of the city.

The *Second Five-Year Plan for the Macao Special Administrative Region on Economic and Social Development (2021-2025)* is currently underway by the SAR Government which will further enrich the World Centre of Tourism and Leisure and promote the quality development of tourism.

Changes in the Internal and External Environment of Tourism in the Post-Pandemic Era

Since the release of the *Master Plan* in 2017, the impact of COVID-19 pandemic and the national dual-circulation development pattern have brought about **new environmental** changes; the Guangdong-Hong Kong-Macao Greater Bay Area Plan and the Policy Address of the Macao SAR Government have proposed **new policy** positioning; sustainable development as proposed by the United Nations and enhanced support for small and medium-sized enterprises (SMEs) has become a **new direction** for Macao’s economic development; and the development of online-based tourism industry and the deepening of the public-private collaboration have pushed forward **new trends**.

New Environment

- The huge impact of the pandemic has prompted the tourism industry to restructure and upgrade, accelerating the shift to higher value-added tourism services.
- The Central Government proposed to build a new development pattern that promotes the dual circulations of domestic and international tourism, bringing new opportunities for Macao to integrate into the overall development of the country.

New Policy

- Macao will implement the *Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area*, deepen regional cooperation in the fields of culture and tourism, and achieve complementary advantages. Through the *Master Plan of the Development of the Guangdong-Macao Intensive Cooperation Zone in Hengqin*, a new situation of all-round cooperation between Zhuhai and Macao will be formed, opening wider space for the long-term development of Macao.
- The concept of “Tourism +” (MICE, cultural and creative industries, e-commerce and sports) is proposed in the Policy Address to promote the extension of the tourism industry chain and facilitate moderate and diversified economic development.

New Direction

- The development of a more sustainable tourism industry will be an important future direction for Macao.
- Encourages and supports the upgrading and transformation of small and medium-sized enterprises to promote the diversified and healthy development of the tourism industry.

New Trend

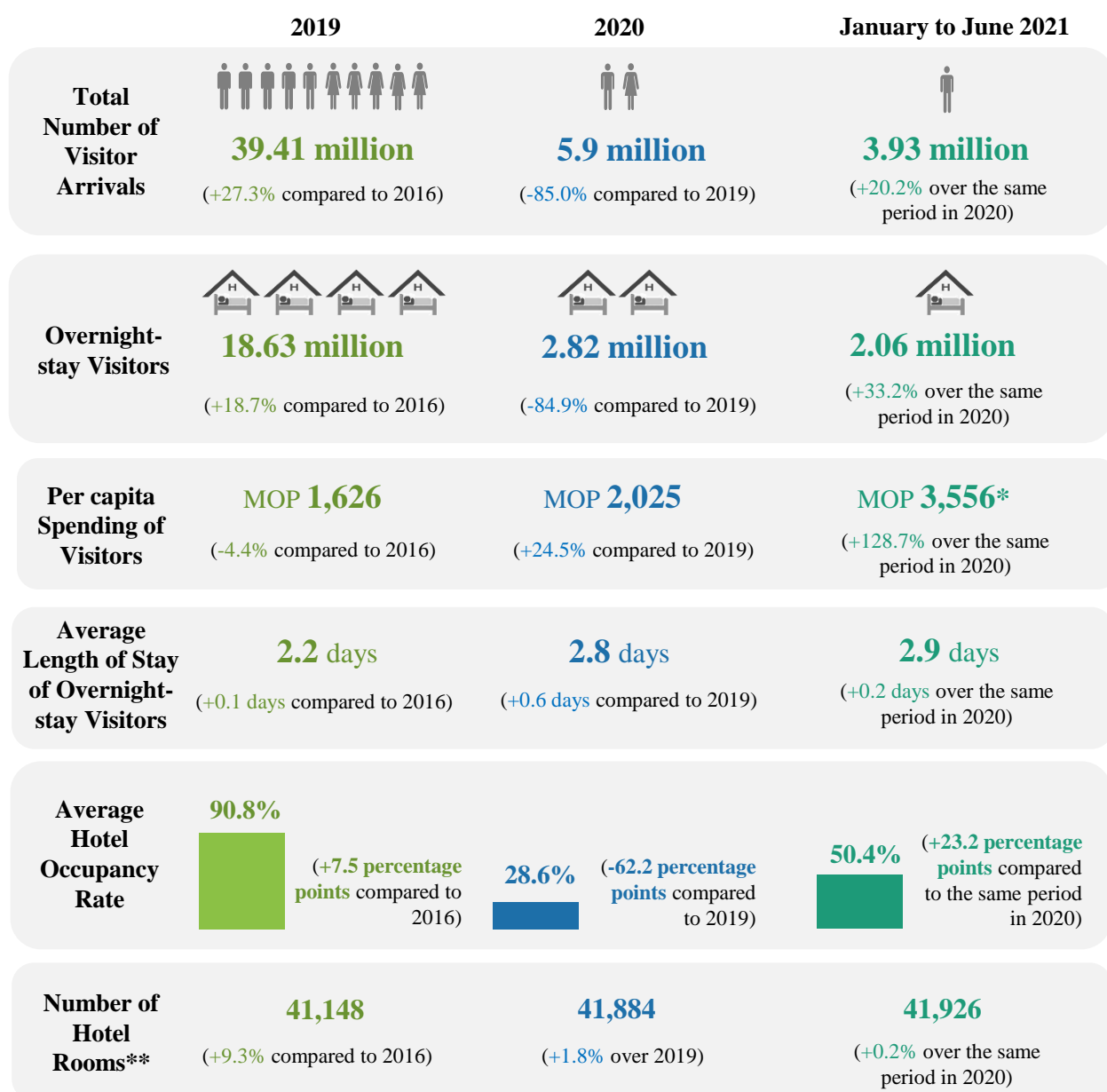
- In response to technological advancements such as artificial intelligence, cloud services, big data, the Internet of Things, and blockchain, online tourism has become a new trend.
- Macao’s tourism development is inclining to a public-private partnership model, with collaborative operations and shared economic benefits.

Analysis of the Current Tourism Development

Overview of the Current Tourism Industry

Before the pandemic, the number of visitor arrivals to Macao continued to rise, reaching 39.41 million in 2019. The number of visitors staying overnight, hotel occupancy rate and number of rooms all increased compared to 2016.

In 2020, the impact of the pandemic has caused the number of visitors to Macao dropped by 85% year-on-year to 5.9 million and the occupancy rate also decreased by 62 percentage points year-on-year. Pursuant to the launching of the scheme “to expand visitor source, revive the economy and secure employment opportunities” by the Macao SAR Government in September 2020 to stimulate tourism spending, several key tourism indicators are showing a recovery trend.



*Data of the first quarter of 2021

Source: Statistics and Census Service and the MGTO (**)

Analysis of the Current Tourism Development

SWOT Analysis of Macao's Tourism Industry



Strengths

- 1) **Political and economic stability and prosperity:** Stable economic growth, good social security, and adequate fiscal reserves.
- 2) **Excellent geographical location:** Adjacent to the rapidly developing Pearl River Delta region, near the Southeast Asian market, and transportation network is well-developed.
- 3) **Rich tourism resources:** Ownership of two renowned name cards - Historic Centre of Macao and the Creative City of Gastronomy, and large number of world-class integrated resorts.
- 4) **High level of government attention:** Clear position as a World Centre of Tourism and Leisure and commitment to improving tourism industry development planning.
- 5) **Strong crisis response capability:** Effective control over the COVID-19 pandemic to resume the normal operation of society in an orderly manner.

S



Opportunities

- 1) **More convenient transportation and customs clearance:** The improved transportation infrastructure and simplified customs clearance procedures in the Greater Bay Area has brought a more convenient experience to visitors.
- 2) **Regional tourism cooperation to promote the diversity of travel experience:** The Greater Bay Area has been gradually strengthening cross-regional cooperation in cultural tourism and is expected to attract more international visitors through cooperation in organizing various unique cultural activities.
- 3) **The building of Hengqin International Recreation Island to help Macao development:** Macao and Hengqin can form a deep integration of complementary industries, market coordination and synergistic development in the tourism industry, which is conducive to Macao's tourism industry to explore and develop a more diverse tourism product system and enrich the recreation industry.
- 4) **“Tourism +” to promote synergistic development among industries:** Development along with emerging industries such as MICE, cultural and creative industries, e-commerce and sports will help enhance the overall competitiveness of Macao's tourism industry.
- 5) **The growth of leisure tourism spending pattern to bring new opportunities:** With the continued growth of tourism spending of mainland Chinese, the attractiveness of Macao's leisure tourism pattern with the theme of culture, gastronomy and family tours is expected to further increase.
- 6) **The pandemic offers an opportunity for Macao to optimize its tourism industry structure:** Macao's tourism industry has a simple structure and a lack of diversification of tourism products. The pandemic has brought an opportunity for Macao to review its products and restructure tourism system.
- 7) **The pandemic to prompt Macao to develop “cloud tourism”:** Macao can promote its unique cuisine and culture to more visitors through online tourism method in order to attract potential visitors and create new growth drivers.

O

Analysis of the Current Tourism Development

SWOT Analysis of Macao's Tourism Industry

Weaknesses



W

- 1) **Inadequate supporting facilities:** Macao's support system in terms of infrastructure, human resource talent development and urban planning is not mature.
- 2) **Relatively homogeneous industry structure:** The gaming sector accounts for a high proportion of the overall economic development, and industries such as MICE, culture and traditional Chinese medicine are still in the development stage.
- 3) **Macao needs to reinforce its regional integration and collaboration:** Due to the differences in the regional legal systems, the tourism authorities of Guangdong, Hong Kong and Macao are currently formulating the regulatory mechanism according to their own laws, and the professional qualification and practicing policies for tourism in the Greater Bay Area still require further development.
- 4) **Single source of visitors:** Visitors are mainly from the Greater China region, and the average length of stay of visitors is relatively short.

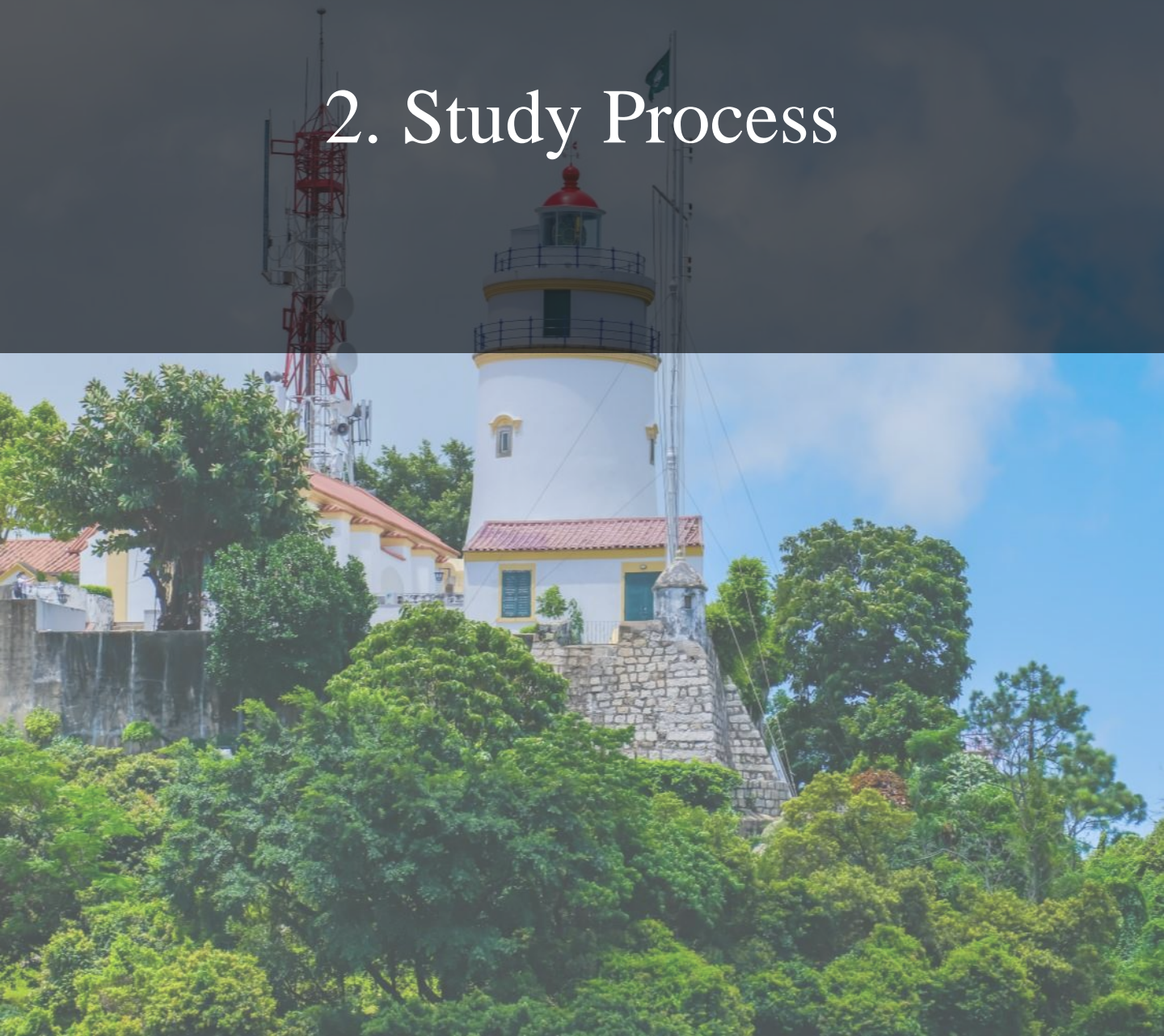
Threats



T

- 1) **Macao's tourism industry has been hit hard by the COVID-19 pandemic:** As a city with a high reliance on tourism, the pandemic has affected the global economy and tourism industry to varying degrees, and it is difficult to determine when international tourism will recover.
- 2) **Mainland Chinese visitors' outbound travel destinations are more diverse:** With the visa and aviation facilitation, the Mainland Chinese visitors have wider choices of outbound travel destinations. The proportion of outbound travel destinations to Hong Kong, Macao and Taiwan region is decreasing year by year.
- 3) **Macao is facing fierce competition from other travel destinations in the Asia-Pacific region:** Vietnam, Thailand and other travel destinations are increasing their competitiveness, while Malaysia, the Philippines, Cambodia and other countries are experiencing rapid growth in their gaming sector due to policies support. These countries are competing with Macao in the gaming market development.
- 4) **The development of Hainan's tourism industry has attracted the return of the mainland Chinese visitors:** Hainan's tax-free policy and the increasing supply of tourism products may pose competition to Macao's tourism industry with its development focusing on duty-free shopping and high-end hotels / resorts.

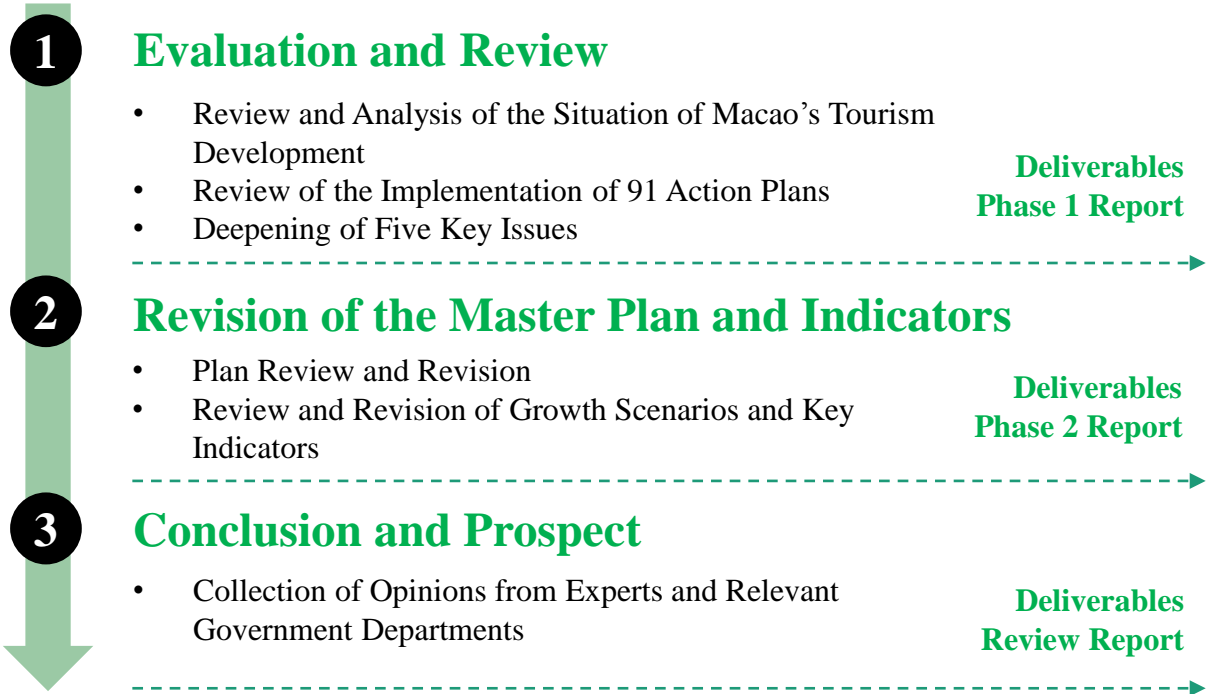
2. Study Process



Study Process

The review of the implementation of the *Macao Tourism Industry Development Master Plan* and analysis of key issues is carried out through interviews with the government and industry participants, surveys among visitors and residents, experts and focus group panels, modelling and benchmark cities case studies, etc., in order to propose suggestions on adjustment to future planning.

The review study is carried out in three phases, each with the following key processes and deliverables:



Study Process

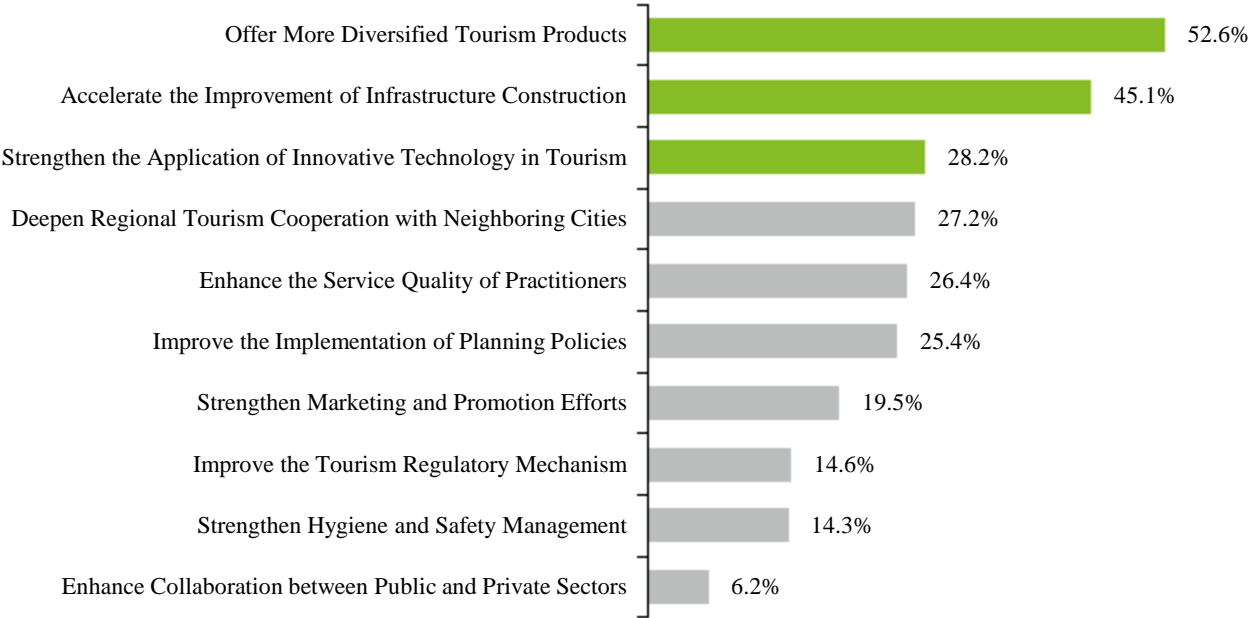
Resident Survey

Between February and March 2021, 1,839 valid questionnaires were collected online from Macao residents on their comments on tourism-related achievements in recent years, and a cross-sectional comparison was made with the results of the 2015 residents’ survey, which showed improvements in all indicators.

Key Findings:

- In respect of the contribution of tourism development**, respondents generally gave a high rating in the aspects where the industry created more employment opportunities, increased international recognition, and drove Macao’s economic development.
- In terms of the impact of tourism development**, residents mostly enjoyed the positive effects of tourism development, including the provision of jobs, increased catering, retail and entertainment options. Although some residents also reported that tourism development has posed impact on local prices, traffic conditions, and rents of stores, there were perceived improvement as compared to 2015.
- In terms of suggestions for the future development of the tourism industry**, more respondents considered “Offer More Diversified Tourism Products (52.6%)” and “Accelerate the Improvement of Infrastructure Construction (45.1%)” as the key tasks to promote the recovery of Macao’s tourism industry. The proposed tourism products include cultural and creative products, sports events and gastronomical elements.

The key tasks that residents believe will facilitate the rapid recovery and sustainable development of Macao’s tourism industry



Source: Surveys conducted and results prepared by the review team

Study Process

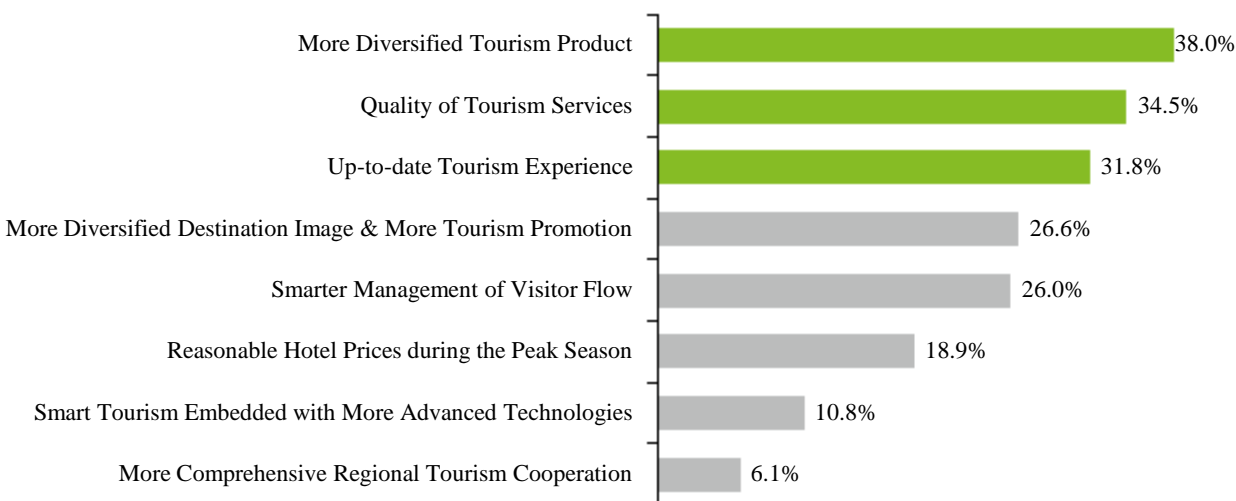
Visitor Survey

A total of 1,218 valid questionnaires were collected from January to April 2021 from visitors aged 18 or above.

Key Findings:

- In terms of reasons for visiting Macao**, more than 70% of the respondents cited “shopping” as one of the reasons for their trip, while “gastronomy” and “leisure/vacation” were also mentioned more frequently.
- In respect of their visitor experience and evaluation**, visitors have a high satisfaction level. More than 90% of the visitors consider Macao a healthy, safe, and convenient city suitable for tourism and leisure. Nearly half of the visitors think that the most important thing about Macao tourism is the “quality of tourism facilities”, followed by the “rich and diversified tourism product system” and “quality and considerate tourism services”.
- In terms of suggestions for the future development of the tourism industry**, about 40% of the respondents believe that Macao needs further improvement in “Offer More Diversified Tourism Products”, “Quality of Tourism Services” and “Up-to-date Tourism Experience”. The proposed tourism product content includes cultural and creative products, special themed hotels, film/art and gastronomy culture.

Aspects That Visitors Think Need to Be Further Enhanced for Macao to Be Positioned as a World Centre of Tourism and Leisure



Source: Visitor survey conducted by the MGTO, compiled and analyzed by the review team



3. Implementation Review and Analysis

Implementation Review and Analysis

Review of the Implementation of the Eight Key Objectives

This review examined the implementation of specific actions under the eight key objectives of the *Master Plan* for the period from 2016 to 2020 through qualitative assessment and related analysis of the United Nations Sustainable Development Goals. It was a scientific, effective and comprehensive review.



Qualitative Assessment

The *Master Plan* published in 2017 put forward 91 action plans, including 69 short-term action plans and 22 medium- and long-term action plans. Through collecting and organizing feedback from relevant implementing departments and conducting departmental interviews, the assessment of the implementation was carried out to analyze the progress and status of targets achieved for each action plan up to 2020.

Qualitative assessment results are presented as follows:

69 Short-term Action Plans

1 action plan is not applicable.

Initiated and implemented **68** action plans, among which 62 action plans achieved the targets set. The implementation rate is **90%**.

22 Medium- and Long-term Action Plans

Action plans progressed as scheduled

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 1. Diversify Tourism Products and Experiences



Gastronomic Culture

- The Macao Year of Gastronomy was launched in 2018 and the Macao International Gastronomy Forum was held for two consecutive years in order to align with the successful designation of Macao as a UNESCO Creative City of Gastronomy in 2017.
- Macao launched the Macanese Cuisine Database in 2020 and a webpage of related theme.



Innovative Products

- The project Anim' Arte NAM VAN was launched in 2016 to transform the area of Nam Van Lake into a new tourism attraction combining cultural and creative, dining, leisure and tourism elements.
- A three-year “teamLab SuperNature Macao” light art exhibition was being held in Macao starting from 2020.
- A number of large integrated resorts were open between 2016 and 2020 including Wynn Palace, The Parisian Macao, MGM Cotai and Morpheus, providing visitors with a diverse experience.



Elements of Culture

- The first “Encounter in Macao - Arts and Cultural Festival between China and Portuguese-speaking Countries” and “Art Macao” international arts and cultural events were held in 2018 and 2019 respectively.
- Macao launched “Guided Cultural Tours” and “In-depth Cultural Tours in Inner Harbour and Taipa” in 2020 to deepen the cultural tourism elements.



Night Tourism

- Macao held the International Film Festival & Awards, Macao from 2016 to 2019.
- From 2016 to 2020, the Macao Chinese New Year Parade was held and invited more than 100 local and overseas performing teams to participate in the show, while the Macao Light Festival invited seven overseas and domestic performing teams to perform in Macao, continuously adding more interactive elements to night tourism activities.
- Continued to subsidize associations to organize night time events from 2016 to 2020 such as the Macao International Lantern Festival (first held in 2016) and the Light Night Market (first held in 2018).



Marine Tourism

- Enriched the marine tourism and water sports elements, launched the Macao Aquatic Trek around Macao Peninsula, Taipa and Coloane (“Macau Cruise”) in 2018.
- The first Guangdong-Hong Kong-Macao Greater Bay Area Cup Regatta & Macao Cup International Regatta was held in 2019.



Hotel System

- Provided full support in the licensing process of budget hotel business and issued licenses to 13 budget hotel establishments between 2016 and 2020.



Macao International Gastronomy Forum



Art Macao



Macau Cruise

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 2. Improve Service Quality and Skills



Vocational Training

- Continued to organize various training programs related to tourism development, assisted tourism practitioners in their skill and career development and enhanced their service quality. 1,342 courses were organized during 2016 to 2020 with a total of 39,406 participants.
- 1st Macao Integrated Tourism and Leisure Enterprises Vocational Skills Competition was held in 2019.
- Two rounds of subsidized courses covering the catering, hotel and MICE industries were launched to support Macao residents affected by the COVID-19 pandemic to re-enter the job market in 2020. Among these courses, “Vocational training courses” offered 2,000 training quota.



Needs Research

- Continued to conduct research on the demand of talents in tourism-related industries such as gaming, hotel, catering, retail and MICE industries. A list of talents demand and a catalog of talents shortage of these industries were prepared to serve as an important reference for decision making.



E-learning

- Continued to enrich online learning elements and launched the “Power in Our Hands” community e-learning program of Macao sign language in 2019. In 2020, Macao launched the “Community Outreach E-learning Program - Introductory Series of Macao History & Culture”, 10 food and beverage service-related learning videos and “Occupational Safety Card for Hotel and Catering Industries Course” e-learning system to encourage employees to continue their studies to enhance their technical skills.
- 41,148 people visited the “Occupational Safety Card for Hotel and Catering Industries Course” by December 2020 and 12,551 people visited the rest of the online courses.



Excellent Service

- In 2014, the “Quality Tourism Services Accreditation Scheme” was launched for the food and beverage sector. It was further extended to the travel agency sector in 2016 and the retail sector in 2019. By 2020, the number of Star Merchants that met the standards and in operation was 460.
- Law No. 3/2019 the *Legal System for Passengers of Light Taxi Vehicles* was implemented with continued specialized training courses for taxi drivers offered on a monthly basis. The number of taxi offenses recorded a decrease of about 48% in 2019 as compared with 2018.



Higher Education

- Continued to improve the quality of tourism education and teaching. The higher education courses of tourism set up by Macao Institute for Tourism Studies, City University of Macau and Macau University of Science and Technology obtained the UNWTO TedQual Certification issued by the World Tourism Organization.



Specialized Training Courses For Taxi Drivers









“Power in Our Hands” Community E-learning Program



Quality Tourism Services Accreditation Scheme (QTSAS)

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 3. Rebrand Macao as a Multi-day Destination and Expand High-value Markets

 Themed Products	<ul style="list-style-type: none"> Cooperated with travel agencies and airlines and launched different kinds of thematic Macao tourism products for different customer groups, such as parent-child tours, sports and festival event ticket package, in order to attract visitors to purchase and extend their stay in Macao. Conducted over 200 online and offline promotional activities targeting high-value target segments between 2016 and 2020.
 Online Promotion	<ul style="list-style-type: none"> Participated in numerous online seminars/promotional events and used the livestreaming tourism platform to sell Macao tourism products. Combining online and offline promotions, as well as mega roadshow “Macao Week in Beijing” held in 2020, to gradually implement the tourism recovery plan to attract visitors to Macao. Launched a series of promotion in cooperation with well-known e-commerce platforms for the first time and distributed hotel half-price coupons, cash vouchers and air ticket coupons online through e-commerce platforms.
 Food Promotion	<ul style="list-style-type: none"> Utilized the theme of gastronomy to promote Macao’s tourism and cultural image. The charm of Macao’s gastronomy and traditional culture was presented to the world through various forms such as food exhibitions, food trucks, food study tours, special food promotions and subsidized activities organized by local communities. Besides, Macao launched a gastronomy map website to promote Sustainable Gastronomy Day set by the United Nations General Assembly and collaborated with National Geographic to launch “The Great Green Food Journey” project.
 Smart Application	<ul style="list-style-type: none"> Introduced new tourism promotion websites, one-stop travel mobile application and Smart Trip Planner to intensify the use of applications across all aspects and enhance visitor experience.
 Social Media	<ul style="list-style-type: none"> Promoted tourism offerings over international and regional leading media, and invited Internet celebrities to Macao for video shooting so as to obtain extensive publicity through their social media platforms. In 2020, the number of followers under tourism-related official social media accounts doubled compared with 2016, reaching 2.84 million.
 MICE Industry	<ul style="list-style-type: none"> Completed the upgrading of mice.gov.mo website and provided assistance and support to organizers of conventions and exhibitions through the <i>Convention and Exhibition Financial Support Programme</i> to strive for more international professional conventions to be held in Macao. According to the International Congress and Convention Association (ICCA), the ranking of Macao leaped to 48th in the world and 12th in the Asia-Pacific region in 2019. Macao continued to organize mega international tourism and MICE events. Nearly 9,200 people visited the Global Tourism Economy Forum - Macao and nearly 165,000 people in total visited Macao International Travel (Industry) Expo from 2016 to 2020. 312 cases in total were approved through the “Travel Stimulation Program” which benefited a total of 74,491 visitors from 2016 to 2020.



Macao Week in Beijing



Coupon Distribution on E-commerce Platforms



Macao International Travel (Industry) Expo

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 4. Optimize Urban Development Model



Urban Planning

- Conducted various urban planning tasks. The preparation of *Urban Master Plan for Macau SAR (2020-2040)* was initiated in 2018 to improve the urban planning functions of the districts and optimize the layout of tourist space.



Infrastructure

- The *Macau International Airport Master Plan* was officially approved in 2016. The Taipa Ferry Terminal, the Hong Kong-Zhuhai-Macao Bridge, the Macao LRT Taipa Line, and the new passenger inspection area at Hengqin Port were opened respectively in 2017, 2018, 2019, and 2020 to strengthen local and regional connections.
- Macao completed first-phase construction of the Commercial and Trade Co-operation Service Platform between China and Portuguese-speaking Countries Complex in 2019 and established a multi-purpose convention and exhibition center.



Environmental Protection Measures

- Continued to facilitate the implementation of environmental protection measures through the “Macao Green Hotel Award”. By 2020, 57 hotels have been awarded which accounted for nearly half of the total number of hotels in Macao.
- Improved the environmental standards of vehicles and optimized the emission limits and measurement methods of vehicle exhaust pollutants. The number of environmentally friendly vehicles increased nearly seven times from 2016 to 2020.



Site Restoration

- Provided support and assistance in the restoration and protection of multiple valuable historical buildings (such as Cinematheque · Passion, the Former Chong Sai Pharmacy, Xian Xinghai Memorial Museum, and the Patane Library).
- Carried out the restoration and revitalization of large-space areas (including Lai Chi Vun shipyards area and Nossa Senhora de Ká Hó) to continue to enrich the diversity of Macao culture and tourism resources.



Pedestrian Improvement

- The inclined elevator connecting the Grand Taipa Hill hiking trail to Taipa Houses was opened to public in 2017. The first phase of the Sky Corridor on Avenida de Guimarães in Taipa was opened in 2019 to improve the connectivity between different districts in Taipa and build a slow-traffic leisure walking system.



Signage

- Digital signage system was adopted in 2018. At present, 34 classical designed direction signs and 49 public toilet signage incorporated with EasyGo QR code in order to provide information about locations, walking routes and other departmental information.



Hong Kong-Zhuhai-Macao Bridge



Macao Green Hotel Award



Grand Taipa Hill Inclined Elevator

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 5. Manage Macao's Tourism Carrying Capacity



Review Study

- Continued to conduct study of tourism carrying capacity, included contents related to key performance indicators on monitoring carrying capacity, and suggested measures to optimize tourism carrying capacity.



Visitor Flow Information

- Distributed information on crowd control to citizens and visitors through channels such as radio, social network platforms, mobile apps, large electronic screens at border ports, and screens of visitor flow prediction systems.
- Citizens and visitors can access the exclusive website of “Smart Application for Visitor Flows” to view the predicted future visitor flow of each tourist attraction to facilitate their itinerary arrangement.



Site Management

- Tourist Police was established to provide assistance to visitors in 2017.
- The public consultation on the second phase of the *Protection and Management Plan of the Historic Centre of Macao* was completed in 2018.
- Implemented crowd control measures for tourist hot spots and built crowd forecast and alert system in key areas since 2019.



Public Transportation

- Optimized the parking space at border crossing points, shuttle bus routes, as well as the joint operation of the shuttle buses of gaming operators. Pushed forward the arrangement for travel agency vehicles to pick up and drop off passengers at the Hong Kong-Zhuhai-Macao Bridge ports and other ports in Macao.
- Signed contracts for additional 200 special taxis in 2019 and have them commenced operation progressively.



Resource Recycling

- Set up waste recycling bins in areas with high volume of visitor flows. By 2020, 166 recycling bins were set in tourist areas.
- Carried out optimization projects of sewage treatment plants in an orderly manner to improve the water quality of discharged sewage.



Sludge Wastewater Pre-treatment Facility



Crowd Forecast and Alert System



Public Recycling Bins

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 6. Deploy and Utilize Innovative Technology



Smart Tourism

- Cooperated with Alibaba Cloud to promote the development of smart tourism. In 2019, “Tourism Information Interchange Platform”, “Application for Visitor Insights” and “Smart Application for Visitor Flows” were launched for the convenience of visitors, tourism industry and citizens.
- Electronic tour guide systems were installed at Mandarin’s House, Lou Kau Mansion, Guia Fortress, Ruins of St. Paul’s, St. Dominic’s Church and St. Joseph’s Seminary and Church by 2019.



Smart Management

- The Macao Smart Hotel Awards was held in 2019 to promote smart management in the industry. 25 hotels in Macao were awarded.
- The Macau-in-Pocket mobile app was launched in 2020 to provide users with convenience to search for, download and use mobile apps that are relevant to living in Macao.



Wi-Fi Service

- Expanded wireless network coverage throughout the city, and encouraged different types of private establishments to join the FreeWiFi.MO plan by phases. By 2020, there were a total of 575 service points, which had increased 374 as compared to 2016.



Crowd Monitoring

- In 2019, the “Macao Smart Policing Project - Crowd Control System of Key Areas” was initiated.
- In 2020, a total of 77 visitor flow monitoring points were set up at areas surrounding Senado Square and Ruins of St. Paul’s, border gate checkpoints, and border gate squares, providing an intelligent crowd early-warning solution for crowded areas.



Security Control

- Carried out phased installation of the Macao Digital City Surveillance System from 2015 and the fourth phase of installation was completed in 2020. A total of 1,620 cameras were installed in the four phases which covering tourist attractions to ensure the safety of residents and tourists.



FreeWiFi.MO



Macao Digital City Surveillance System



Award Ceremony of Macao Smart Hotel Awards 2019

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 7. Enhance Tourism Industry Cooperation



Laws and Regulations

- Improved tourism laws and regulations, and proffered strong support to legislative process for the *Law on the Operation of Hotel Establishments*. Meanwhile, follow-up procedures were carried out in respect of the revision of the *Law on the Operation of Travel Agencies and Tour Guide Profession*.



Public-private Collaboration

- Subsidized 48 communities to organize about 200 community tourism promotional activities from 2016 to 2020 such as the Macao Food Festival and the Macao Shopping Festival, etc. In addition, Macao subsidized communities to organize other types of activities such as the Miss Macao Pageant (2019) to promote diversified development of tourism products.
- Macao supported enterprises to organize mega events and develop new tourism products such as the Ice World With The DreamWorks All-stars exhibition in 2017, the Asia's 50 Best Restaurants Award Ceremony in Macao in 2018 and 2019, the MICHELIN Guide Hong Kong Macao's Street Food Festival in 2018 and the Black Pearl Restaurant Guide Launch and Award Ceremony in Macao in 2019 and 2020.



Online Service

- Launched "Price List Submission System for Restaurants, Night Clubs and Bars" in 2018 and online renewal services for hotels, restaurants, nightclubs, bars and travel agencies in 2020, in order to provide convenient online services for the industry.



Pandemic Prevention

- During the COVID-19 outbreak, briefing sessions were held for the hotel and travel industry. Coordinated with the industry to utilize 13 hotels as the venues for medical observation.
- Held regular working meetings and conducted joint inspections to monitor the pandemic control measures of hotels and forwarded pandemic prevention guidelines to the industry in due course.



Cultural Tourism Brand

- The Design Contest for Macao Tourism Mascot was held in 2017 and the champion work of Mak Mak became Macao's tourism mascot. Since its launch, Mak Mak was used for destination promotion in a total of 137 events to promote Macao tourism. The *Financial Support for 'MAK MAK' Cultural Tourism Brand Building Scheme* was launched in 2019 with 70 products produced by 2020.
- The *Subsidy Programme for Integration of Culture and Creativity into Community Revitalization* was launched in 2018 to create distinctive community stores with cultural and creative elements.
- Organized the Tap Siac Craft Market regularly and continuously subsidized enterprises to organize small-scale cultural and creative exhibitions and develop distinctive cultural and creative products. Besides, individuals were encouraged to create local brands and sell cultural and creative products.



Tourism Recovery

- Launched the "Macao Ready Go!" e-Platform and the local travel scheme "Macao Ready Go! Local Tours" in 2020 in order to provide a new and economical tourism scheme to Macao residents and boost the recovery of tourism and related industries. A total of 671 merchants registered to use the "Macao Ready Go!" e-Platform in 2020, and in which 2,053 promotion programs were launched with more than 7.3 million views. "The Macao Ready Go! Local Tours" local tour scheme attracted more than 140,000 enrollments and participation of 151 travel agencies, 445 tour guides and 508 coach drivers.



Macao Ready Go! Local Tours



Macao Tourism Mascot "MAK MAK"



Site Inspections during the pandemic

Implementation Review and Analysis (Qualitative Assessment)

Key Objective 8. Enhance Macao's Position as a Core Tourism City in the Regional and International Tourism Arena



Regional Cooperation

- Maintained close cooperation with Mainland China tourism authorities. 14 memoranda of tourism cooperation were signed between the tourism department of the Macao SAR Government and Mainland China provinces and cities from 2016 to 2020.
- The Tourism Federation of Cities in the Guangdong-Hong Kong-Macao Greater Bay Area was established in 2017 to build a world-class tourism destination through ways of resource integration, image promotion and joint marketing, etc.
- The Hong Kong-Zhuhai-Macao Bridge and border points opened in 2018 and Hengqin Port opened in 2020 both adopted the innovative mode of “joint boundary clearance” to promote the integration of various regions.
- In 2020, the Entity of Coordination and Supervision of Tourism Market in the “9+2” Cities of the Guangdong-Hong Kong-Macao Greater Bay Area was officially formed to uphold the quality of tourism.



Event Organization

- Cooperated with neighboring cities to organize cultural, sports and tourism activities. In 2019 Macao and Zhuhai jointly held “Macao-Zhuhai Fireworks Show in celebration of the 20th Anniversary of Macao's Handover to the Motherland” for the first time in 2019 and developed the tourism mega event into two-cities event.
- Deepened regional cultural cooperation and exchange by organizing two-cities events such as the Hong Kong and Macao Visual Arts Biennale and the “Showcase of Guangdong, Hong Kong and Macao Cantonese Opera Masters”.
- Organized youth sports exchange activities with Guangdong, Zhuhai and Hong Kong under various cooperation frameworks.



International Cooperation

- Continued to participate in the activities held by other Creative Cities around the world. Actively joined meetings of different international tourism organizations to improve Macao's participation in international tourism agenda, including World Tourism Organization, the UNESCO Creative Cities Network, the APEC Tourism Working Group, the Pacific Asia Travel Association, the World Tourism Cities Federation, the International Congress and Convention Association, the Asian Federation of Exhibition and Convention Associations and the Asian Association of Convention and Visitor Bureaus, etc.
- Continuously conducted tourism training for tourism officials from the Portuguese-speaking countries on the basis of the signed memorandum of understanding on tourism cooperation between Macao and the Portuguese-speaking countries. From 2016 to 2019, 122 tourism officials from Portuguese-speaking countries in total came to Macao for training.
- Conducted international exchanges with ministers and tourism industry leaders through organizing the Global Tourism Economy Forum and worked together with World Tourism Organization to release the *Asia Tourism Trends Survey*.



International Recognition

- From 2016 to 2020, Macao received more than 70 tourism awards, including the 2013-2017 Industry Contribution Award from the World Tourism Cities Federation, the Marketing Award and the e-Marketing Gold Award from the Pacific Asia Travel Association (PATA), and the Best Consumer Exhibition from the Asian Federation of Exhibition and Convention Associations (AFECA) for the Macao International Tourism (Industry) Expo in 2018 and 2019 respectively.



Macao-Zhuhai Fireworks Show in celebration of the 20th Anniversary of Macao's Handover to the Motherland



Macao Signed a Memorandum of Understanding on Tourism Cooperation with Portuguese-speaking Countries



Global Tourism Economy Forum

Implementation Review and Analysis (SDGs)

Correlation Analysis between the Action Plans and SDGs

In 2015, the “2030 Agenda for Sustainable Development” and 17 Sustainable Development Goals (SDGs) were passed by the United Nations Summit on Sustainable Development to call on the world to protect the planet while promoting economic prosperity, to transform the world and achieve a blueprint for a better and more sustainable future for all.

As a World Heritage Site and Creative City of Gastronomy designated by UNESCO, Macao actively fulfills the commitment to the UN sustainable development in the development of tourism industry and strives to build a happy, smart, sustainable and resilient city.

The 91 action plans listed in *Master Plan*, as well as the routine tasks of the Macao SAR Government, directly or indirectly implement the requirements of the UN SDGs. Under this background, this review conducted a correlation analysis of 17 SDGs to ensure the sustainable development of Macao’s tourism industry in the future.

17 Sustainable Development Goals (SDGs)



Picture source: UNWTO

Implementation Review and Analysis (SDGs)

Correlation Analysis between the Action Plans and SDGs

The corresponding relationships between *Eight Key Objectives of the Macao Tourism Industry Development Master Plan* and SDGs are as follows:

Key Objective	Sustainable Development Goals (SDGs)
1 Tourism Resources and Product Systems	8, 12, 14
2 Tourism Quality and Service System	4, 8, 10, 12, 17
3 Tourism Branding and Marketing Strategies	8, 17
4 Tourism Industry and City Development	2, 3, 7, 9, 10, 11, 12, 13
5 Tourism Carrying Capacity	3, 4, 6, 7, 9, 11, 12, 14
6 Tourism and the Application of Innovative Technology	4, 8, 9, 11, 16, 17
7 Tourism Industry Cooperation System	16, 17
8 International and Regional Tourism Cooperation and Development	8, 11, 16, 17

A photograph of a tree with vibrant red flowers in the foreground, with a building featuring arched windows in the background. A semi-transparent dark band across the middle of the image contains the section header text.

4. Deepening of Key Issues

Deepening of Key Issues

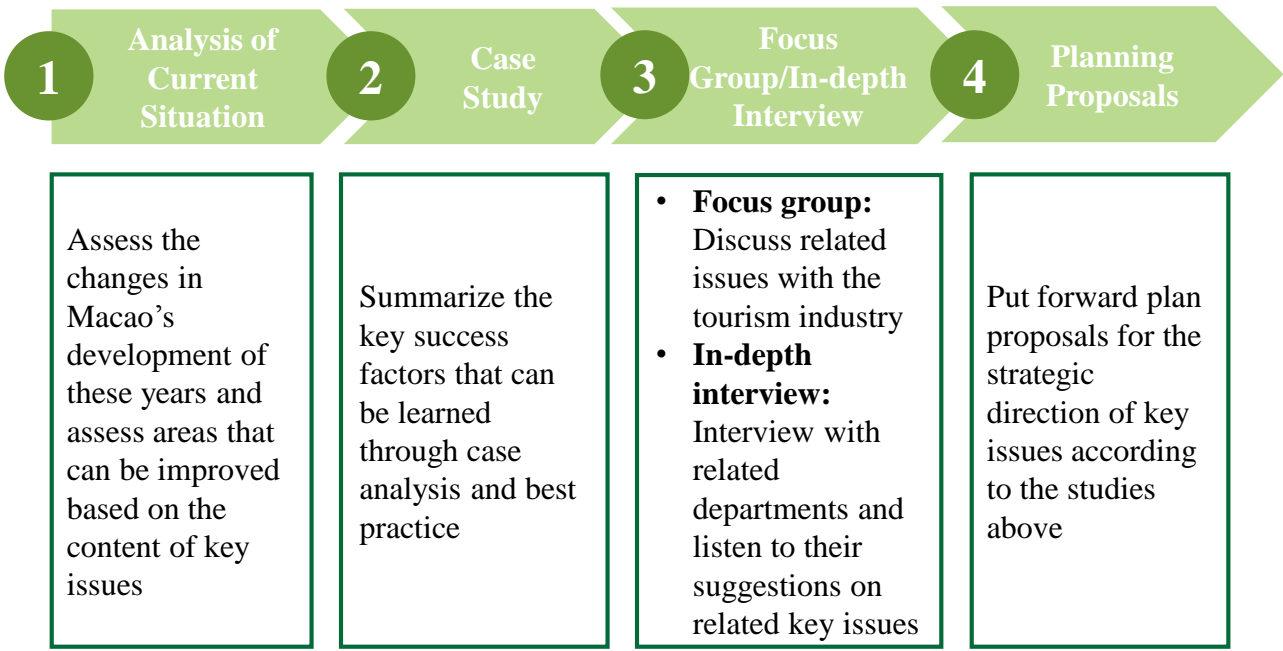
Research Method for the Deepening of Key Issues

Due to the dynamic changes in internal and external environment of Macao’s tourism in recent years, it is necessary to study the related key issues and tourism development trend to fully understand the advantages and drawbacks in the development in order to make pertinent improvement in the future.

Based on this purpose and after an extensive study on the global tourism industry together with Macao’s practical situation and demands, the following five key issues to be deepened are summarized based on the data collected from each phase.



The key issues are deepened in four phases including analysis of current situation, case study, focus group/in-depth interview and planning proposals of the study process.



Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

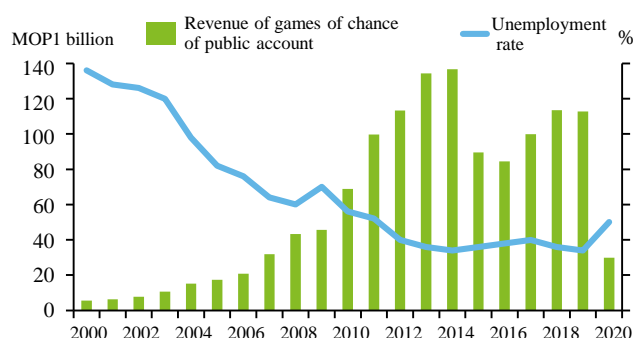
Key Issue 1. Contribution of Tourism to the Economy

Policy Address for the Fiscal Year 2021 put forward that playing the leading role of tourism as the pillar industry is necessary for accelerating the recovery of economy. Besides, the industry chain of tourism should be extended, and the “Tourism +” policy is put forward to boost the development of related industries.

The contribution of tourism to Macao’s economy is analyzed during this review from the issues including “Tourism +”, collaboration between public and private sectors, and recovery of tourism after the pandemic, and related optimization suggestions are proposed in the analysis.

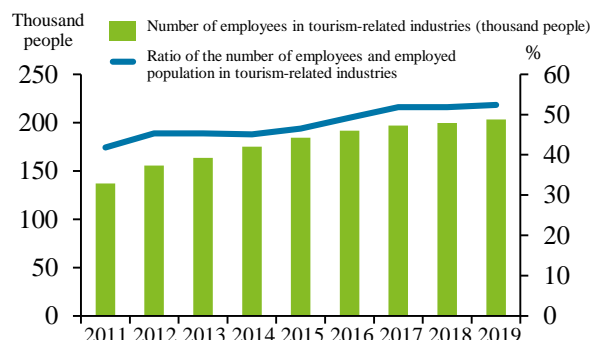
The chart below shows the driving effect of tourism related industries to Macao’s economy, including the continual decline in unemployment rate and continual increase in employed population in tourism related industries.

The Overall Tendency of Unemployment Rate and the Revenue of Games of Fortune of Macao Public Account



Source: Statistics and Census Service; statistics database; collated by the team

Ratio of the Number of Employees and Employed Population in Tourism Related Industries of Macao



Source: Statistics and Census Service; the historical annual analysis reports on tourism satellite account and the historical annual reports on employment survey; collated by the team

Current Situation

- Lack of statistics on indirect benefit of tourism activities. It is difficult to assess the overall contribution of tourism to local economy in a more comprehensive way
- Lack of clear overall features and functional positioning of different communities. It is difficult for small and medium-sized businesses to produce agglomeration effect after they establish in the respective communities
- The development of tourism products are majorly directed by the government, therefore need to strengthen public-private collaboration and data communication
- Lack of talents, low diversity in the industrial structure, low degree of marketization and changes in operation environment after the pandemic are challenges faced by the tourism related industries

Areas for Improvement

- Continue to **optimize the statistics of tourism**
- **Enhance the attractiveness of community tourism** by reforming the communities, supporting special enterprises, improving facilities and strengthening cross-industry promotion
- **Strengthen public-private collaboration** to attract industries to put forward more “Tourism +”
- **Support the growth of the industry**, cultivate talents and assist enterprises in adapting to the changes in operation environment after the pandemic

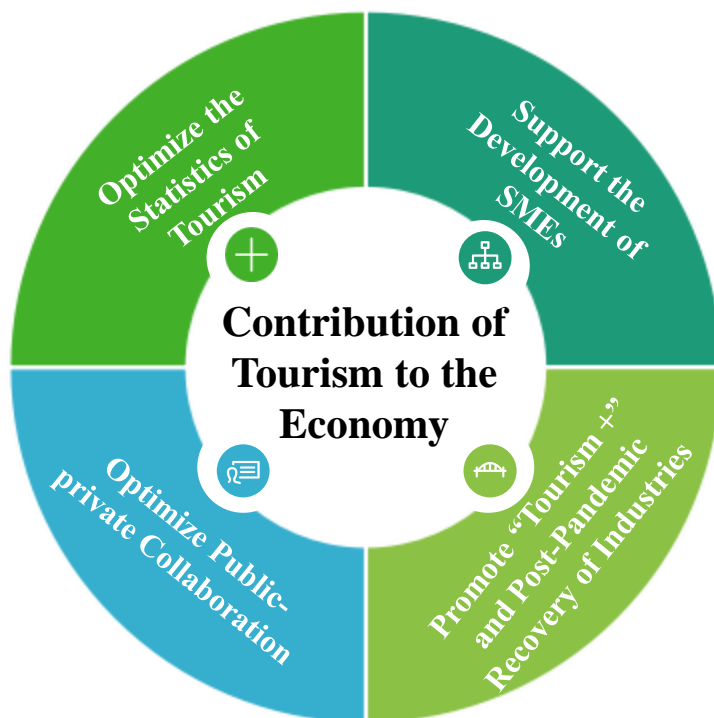
Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 1. Contribution of Tourism to the Economy



Improve the data of “Tourism +” related industries based on existing tourism statistics



Enhance the attractiveness of community tourism resources through collaborative promotional plans which utilize tourism to boost the development of SMEs and community economy



Continue to optimize public-private collaboration and encourage information exchange; attract more enterprises and institutions to promote the development of “Tourism +”



Seize Macao’s advantages of being a safe and tourist-friendly city, attract more high-quality conventions and sports events, and assist SMEs operating on e-commerce platforms

Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 2. Regional Tourism Cooperation

Macao has continually deepened the regional tourism cooperation with Hengqin, Guangdong-Hong Kong-Macao Greater Bay Area and countries along the Belt and Road, which effectively promoted the construction of the World Centre of Tourism and Leisure. However, new challenges towards Macao’s regional tourism cooperation have been put forward by the deepening of national strategic plans, new norms of tourism in the post-pandemic era and the objective situation of “one country, two systems, three tax legal systems, three laws and three currencies” in the Greater Bay Area.

The cooperation between the Guangdong-Hong Kong-Macao Greater Bay Area is the focus of this review. Areas for improvement in Macao’s regional tourism cooperation are analyzed from five directions, namely system and mechanism, infrastructure, co-building of destination image, tourism products and tourism cooperation. Besides, corresponding optimization suggestions are proposed.

	Current Situation	Areas for Improvement
System and Mechanism	<ul style="list-style-type: none">Macao and neighboring areas formulate market supervision and professional qualification certification mechanism according to their own existing lawsCustoms clearance mode and the visa policy for specific tourists are not convenient enough	<ul style="list-style-type: none">Improve the cooperation mechanism of regional tourism market supervision and professional qualification of practitionersCommunicate with mainland to optimize the customs clearance efficiency and the visa policies for regular visitors to Macao
Smart Tourism Infrastructure	<ul style="list-style-type: none">Macao has not effectively established a seamless linkage with nearby mainland airports	<ul style="list-style-type: none">Deepen the co-construction of infrastructures, and gradually improve the convenience of transportation between Macao and the world
Destination Image	<ul style="list-style-type: none">Currently, cities in the Greater Bay Area are mainly propagandized as single city on their own. The Greater Bay Area is not well-known as an integrative traveling destination	<ul style="list-style-type: none">Create symbolic collaborative tourism promotion activities, design unified themes and slogans, and improve the building of the overall brand of the Greater Bay Area
Tourism Products	<ul style="list-style-type: none">Tourism products lack diversity and there is still room to improve	<ul style="list-style-type: none">Further encourage the tourism industry to participate in the regional tourism cooperation, establish cooperation mechanism, and collaboratively develop tourism products and routes
Tourism Cooperation	<ul style="list-style-type: none">Experiment synergistic initiatives on various areas, yet the number of industrial collaboration projects accomplished through regional cooperation is still relatively small	<ul style="list-style-type: none">Take tourism as an opportunity, and introduce more quality resources on MICE, sports, cultural and creative industries and traditional Chinese medicine from other cities in the Greater Bay Area, in order to boost the rapid development of rising industries of Macao

Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 2. Regional Tourism Cooperation



Cooperate to develop various activities like cultures, arts and sports, and boost the development of regional “Tourism +” related industries



Optimize the tourism market supervision, and improve the operation regulation

Utilize base for tourism education, and strengthen the cooperation in human resources development, tourism education and training



Develop interactive and complementary high-end themed tourism products and routes based on shared tourism resources of the Greater Bay Area/Hengqin and cater to high-value target segments



Improve infrastructures, and build a freely travel environment



Build a unified destination brand and cooperate to launch promotional activities through the Tourism Federation of Cities in the Guangdong-Hong Kong-Macao Greater Bay Area

Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 3. Tourism Carrying Capacity

Tourism carrying capacity has been a topic concerned by popular tourism cities. In recent years, Macao's demands for relieving tourism carrying capacity and balancing the tourism and social development have become increasingly urgent. The sharp decline in tourist number resulted from the pandemic has provided Macao a great opportunity to re-evaluate the tourism carrying capacity and improve residents' wellbeing. Besides, World Tourism Organization once proposed 11 measures to enhance tourism carrying capacity, which provided lots of measures and strategies for city tourism management. Macao can take this for reference.

The related optimization proposals were put forward by reviewing Macao's existing tourism carrying capacity and combining 11 measures from World Tourism Organization with Macao's situation.

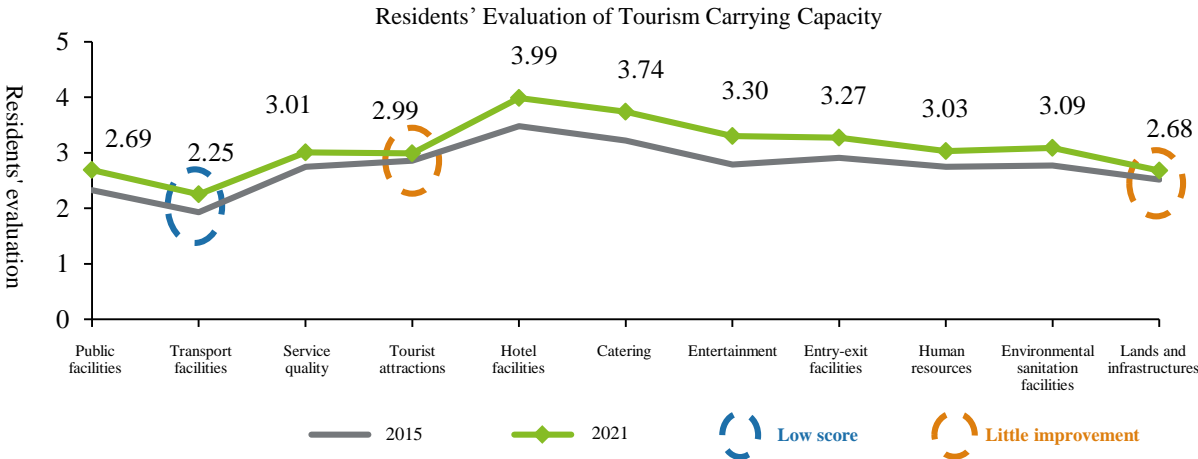
Current Situation

- **During the peak season**, major free-admission tourist attractions are easy to get **over-crowded**
- **In terms of transport facilities and public resources**, the public transport system like taxis and buses **has limited carrying capacity**; hotels, water environment carrying capacity and solid waste carrying capacity are **constrained at different degrees**

Areas for Improvement

- **Decentralize the distribution and visit time of tourists inside and outside the city**, and carry out reasonable **monitoring and responsive measures**
- Improve the **infrastructures and facilities** of the city, especially the carrying capacity of **transport facilities**

By comparing two resident survey results of 2015 and 2021, it shows that there is little improvement in the **carrying capacity of tourist attractions, lands and infrastructure**, and the score for **transport carrying capacity** remains low.



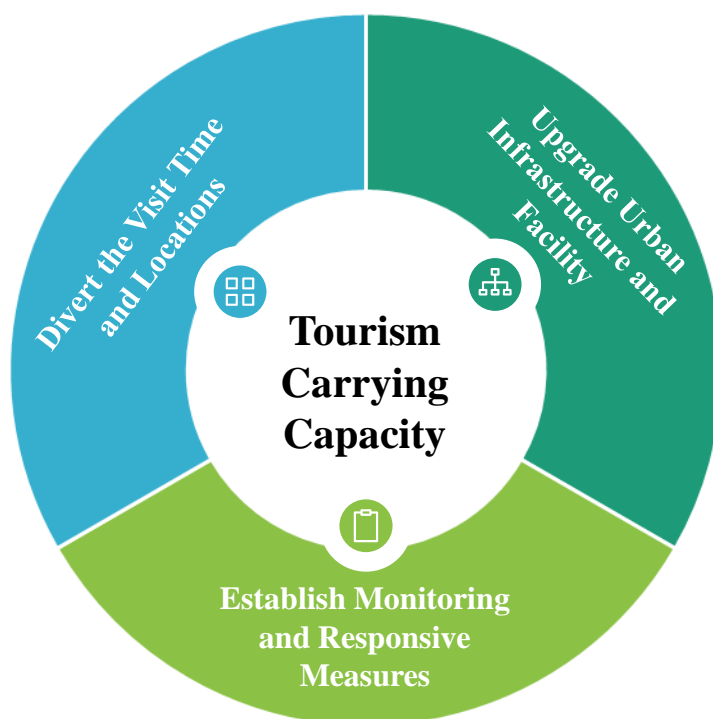
Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 3. Tourism Carrying Capacity



Decentralize the tourists inside and outside the city, carry out activities and develop new tourist attractions in areas with fewer tourists

Divert the tourists' visit time; encourage tourism activities to be held during low season and increase night activities to the sights with relatively more people



Implement real-time monitoring at the sights, and use new technologies to strengthen dynamic crowd diversion

Formulate contingency plans for peak periods, and continue to improve the measures to divert the crowd according to the changes of the actual situation



Improve the protection of existing facilities to ensure the quality of cultural heritage and tourist attractions

Improve the pedestrian environment and achieve balanced and sustainable transport management

Encourage the recycling of reclaimed water and kitchen waste, strengthen the supervision on environment carrying capacities such as water environment, solid waste and air quality

Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 4. Diversification of Visitor Source Markets

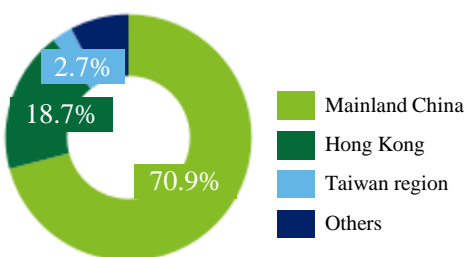
Despite the number of visitors to Macao continued to increase before the pandemic, the issues of homogenous tourist structure based on single source of visitors and the short average length of stay still prevailed. On the other hand, visitors' needs in traveling changed along the passage of time. Destinations have to offer more diversified travel experience in order to maintain international competitiveness.

The marketing strategy of targeting high-value segment was mentioned in the *Master Plan* in order to cope with this situation. Pertinent products and services are provided to promote the diversity of visitor sources. In this review, consumer behaviors and motivations were further analyzed, the portrait of tourists visiting Macao was studied in depth, and related optimizing suggestions were proposed.

Current Situation

- Inbound visitors are mainly from **Mainland China, Hong Kong and Taiwan region**, which took up **more than 90%** of the visitor sources

Visitor Source Markets Visiting
Macao in 2019



- The traditional motives of visitors to Macao are shopping, gastronomy, entertainment and leisure, sightseeing and business travel. In recent years, **some emerging demand have developed rapidly**, such as:



Wedding Photo
Shooting Tour



Healthcare



Wealth
Management



Areas for Improvement

Focus on and prioritize high-value target segments including **young couples, white-collars, middle and high-class families, young people of the Z generation**. The improvement can be achieved from the following two aspects:

Product
and Service

- Adjust tourism products according to visitors' preferences, provide themed tourism experiences, promote **diversified consumption** and maintain product uniqueness and newness.
- Provide **adequate services** according to visitor preferences, including wedding photo shooting tours, wealth management and healthcare services.

Destination
Marketing

- Analyze visitor source markets with **more detailed big data**
- Analyze and categorize** the target visitor groups and carry out targeted promotion
- Carry out precision marketing by acquiring data from well-developed e-commerce platforms, and **build a tourism brand with Macao features**

Source: MGTO, surveyed and compiled by the review team

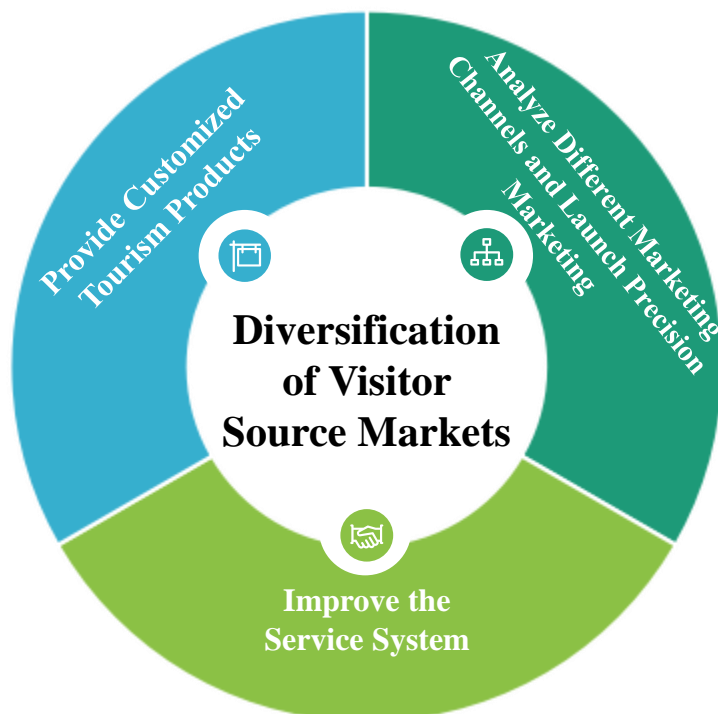
Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 4. Diversification of Visitor Source Markets



Provide customized themed tour experience according to different target visitor segments

Extend the length of stay of visitors by promoting the multi-destination tourism products with the Greater Bay Area/Hengqin



Provide differentiated services according to the demands and preferences of visitors to attract high-value target segments



Strengthen the analysis of big data of new visitor sources to provide foundation for precision marketing

Continue to assess the effectiveness of promotion channels of various markets to reasonably allocate marketing resources

Build unique destination image to achieve realization of monetization from visits

Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 5. Smart Tourism Led by Science and Technology

In recent years, smart tourism has become one of the main directions of global destination development. In order to align with the government’s development vision of “to expedite the development of a smart city”, three goals of smart tourism were proposed in 2016, namely increasing tour experience by smart applications, analyzing tourist behaviors with big data and smart supervision by information technologies, aiming at building Macao as a smart tourism destination.

On the basis of the three goals, the review established three assessment standards of smart tourism, namely infrastructure and tourist experience, abundance of ecosystems and degree of application of smart technologies, in order to analyze existing areas for improvement and optimizing suggestions of smart tourism in Macao.

Goals	Current Situation	Areas for Improvement
Enhance visitors’ experience before, during and after their travel through various applications of smart tourism	<ul style="list-style-type: none">The experience of smart tourism is currently scatteredThe overall smart experience is still one-way output	<ul style="list-style-type: none">Provide end-to-end destination experience or seamless and customized travel experience for visitorsStrengthen the multi-lateral interactions among tourists and between tourists and tourist attractions
Use big data to further analyze visitors’ behaviors	<ul style="list-style-type: none">Direct analysis is made only through the application of big dataThe public-private collaboration and cooperation between industries on information technologies are still at the initial stage	<ul style="list-style-type: none">Gradually develop derived services like self-assess tools and predictive data analysisThere is plenty room for improvement of the online platform where tourism industry obtains information, shares data, and engages in exchange and cooperation
Use information technology to monitor tourism attractions/ congested areas and to divert visitor flow	<ul style="list-style-type: none">Smart Application for Visitor Flows prediction is currently applied in 20 tourist attractions in Macao. The usage rate can be improved	<ul style="list-style-type: none">Display Smart Application for Visitor Flows in different ways to strengthen the degree of promotionGradually enhance the function of real-time people flow and diversion

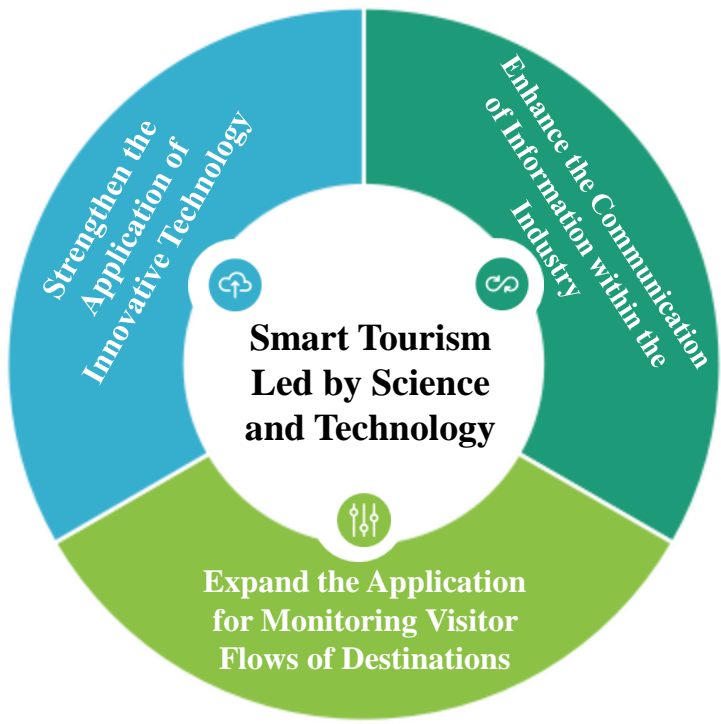
Deepening of Key Issues

Current
Situation

Areas for
Improvement

Proposals

Key Issue 5. Smart Tourism Led by Science and Technology



Strengthen the application of new technologies, increase the deployment of technologies in building infrastructure of Macao's tourism industry, and enhance the visitor experience

Promote tourism through online platforms, and optimize the development environment of Macao's online tourism

Optimize the business models and procedures by combining the development of new infrastructures such as 5G, the Internet of things, artificial intelligence and big data



Enhance the information communication within the industry through cloud and big data technologies

Enlarge the open resources of big data, and encourage SMEs to apply technological resources



Use information technology to monitor visitor attractions/areas with intensive visitor flow to assist the diversion and decentralization of visitors



5. Plan Review and Revision

Plan Review and Revision

To build Macao into the World Centre of Tourism and Leisure, the *Master Plan* of 2017 put forward eight key objectives, 33 strategies, 29 planning proposals, and 91 action plans in short term, medium term, and long term.

After review, one original action plan is no longer applicable. Furthermore, to respond to the current changes in the environment of tourism, 62 original short-term action plans that have achieved the targets are deepened, and the content of the remaining 28 action plans in progress are revised, updated and integrated. Besides, 16 new action plans are added. There are 91 action plans in total after the review.

The action plans are divided into phased plans (0-5 years) and long-term plans (6 years or above). After review and revision, there are 77 phased plans and 14 long-term plans.



Plan Review and Revision

Objective 1. Diversify Tourism Products and Experiences

Planning Proposals	Phased Plans	Long-term Plans
<div>P1.1</div> <div>Introduce Marine Tourism Products</div>	<ul style="list-style-type: none">• P 1.1.1 Enrich and optimize maritime sightseeing programs• P 1.1.2 Continue to develop more water sports activities• P 1.1.3 Upgrade and optimize yacht tourism programs	<ul style="list-style-type: none">• P 1.1.4 Build Macao into the core city for multi-destination travel in the Guangdong-Hong Kong-Macao Greater Bay Area through the comprehensive development of marine tourism products
<div>P1.2</div> <div>Develop Iconic Tourism Facilities</div>	<ul style="list-style-type: none">• P 1.2.1 Continue to optimize the Macao Grand Prix Museum• P 1.2.2 Continue to upgrade family “edutainment” facilities• P 1.2.3 Develop a multi-purpose MICE complex	<ul style="list-style-type: none">• P 1.2.4 Develop urban cultural facilities in the new reclamation area• P 1.2.5 Revitalize the Macao Wine Museum• P 1.2.6 Promote the construction of multi-purpose MICE complexes (new)
<div>P1.3</div> <div>Enrich Iconic Tourism Activities and Experiences</div>	<ul style="list-style-type: none">• P 1.3.1 Add more nighttime activities and programs• P 1.3.2 Host Macao’s unique cultural performances and festivals• P 1.3.3 Continue to introduce smart tourism technology applications to the existing tourist attractions• P 1.3.4 Encourage local communities and private businesses to create new tourism experiences• P 1.3.5 Deepen the construction of Creative City of Gastronomy• P 1.3.6 Continue to roll out interesting activities throughout the year in conjunction with mega events• P 1.3.7 Develop high-end tourism experiences (new)• P 1.3.8 Develop cultural and creative exhibition activities (new)	
<div>P1.4</div> <div>Expand Hotel and Retail Offerings</div>	<ul style="list-style-type: none">• P 1.4.1 Continue to encourage the development of more diversified accommodation options• P 1.4.2 Continue to facilitate the development of local branded retail and boutique shops	<ul style="list-style-type: none">• P 1.4.3 Set up areas for food and beverage, leisure and entertainment facilities in the new reclamation area

<div>Specific Actions in Focus:</div> <ul style="list-style-type: none">▪ Discuss the optimization plans for existing routes and themes with cruise operators to enrich maritime tour experience.▪ Strengthen the Guangdong-Macao intensive cooperation in Hengqin, and jointly promote the development of tourism resources on both sides of the river between Macao and Zhuhai and the islands in the regions.▪ Continue to develop more facilities for family segments by adding “edutainment” elements to suitable tourist attractions.▪ Integrate the ecological resources of Macao in developing eco-tourism routes.▪ Encourage local performers to perform or participate in programs overseas to enhance Macao’s international recognition.▪ Strengthen the promotion of distinctive night activities, and present Macao’s night tourism resources to visitors in a three-dimensional manner.▪ Communicate with helicopter service providers to promote helicopter tours under the feasible circumstances.▪ Continue to promote the positioning of the Tap Siac Craft Market as a cultural and creative development project in the Guangdong-Hong Kong-Macao Greater Bay Area.▪ Continue to develop St. Lazarus Parish and other potential areas into cultural and creative zone.

Plan Review and Revision

Objective 2. Improve Service Quality and Skills

Planning Proposals	Phased Plans
<div>P2.1</div> <div>Skills and Workforce Development for Career Path Planning</div>	<ul style="list-style-type: none">• P 2.1.1 Promote Macao skills and workforce development for career path planning• P 2.1.2 Continue to forecast skills and workforce development in tourism• P 2.1.3 Study the demand of Macao tourism for non-resident workers and relevant policies• P 2.1.4 Promote the international development of Macao skills and workforce• P 2.1.5 Utilize Macao as the Tourism Education and Training Base for the Guangdong-Hong Kong-Macao Greater Bay Area (new)
<div>P2.2</div> <div>Implement Online Learning Management System for Integrated Tourism Quality Assurance</div>	<ul style="list-style-type: none">• P 2.2.1 Continue to establish the online learning management system
<div>P2.3</div> <div>Upgrade Tourism Services to Meet International Standards</div>	<ul style="list-style-type: none">• P 2.3.1 Continue to promote the Quality Tourism Services Accreditation Scheme (QTSAS)• P 2.3.2 Encourage residents to participate in the promotion of Macao tourism and culture, and promote “Mass Reception”

<div>Specific Actions in Focus:</div> <ul style="list-style-type: none">▪ Explore and formulate the content of the International Skills and Training Development Programme.▪ Offer nationally or internationally recognized training courses or skills tests, and promote the development of “One Examination, Multiple Certificates”.▪ Deepen research and exchanges with other tourism education units in the Greater Bay Area, as well as strengthen cooperation in the human resource development, tourism education and training.▪ Continue to digitize the eligible training courses so that residents can learn anytime anywhere.▪ Cooperate with various institutions such as associations, schools and other organizations during the large-scale activities or the peak season, and encourage residents and students to participate in the promotion of Macao tourism.▪ Continue to organize and deepen the “Cultural Ambassadors Programme” to showcase Macao’s cultural heritage to the world.

Plan Review and Revision

Objective 3. Rebrand Macao as a Multi-day Destination, and Expand High-value Markets

Planning Proposals	Phased Plans
<div>P3.1</div> <div>Enhance the Marketing for High-value Target Segments</div>	<ul style="list-style-type: none">• P 3.1.1 Conduct research and analysis on the target markets• P 3.1.2 Increase promotion activities towards high-value market segments
<div>P3.2</div> <div>Rebrand Macao as a Multi-day Destination</div>	<ul style="list-style-type: none">• P 3.2.1 Optimize global marketing strategies• P 3.2.2 Enhance the promotion of multi-day tour plan• P 3.2.3 Deepen the existing brand image of Macao, and build Macao into a multi-destination city
<div>P3.3</div> <div>Strengthen the MICE Organization and Marketing</div>	<ul style="list-style-type: none">• P 3.3.1 Strengthen the information exchanges on the “Tourism + MICE”• P 3.3.2 Continue to promote implementation of the Convention and Exhibition Financial Support Programme• P 3.3.3 Actively promote the MICE industry through international and regional cooperation• P 3.3.4 Optimize and improve the electronic application of MICE related services and financial support program
<div>P3.4</div> <div>Upgrade Online Marketing Systems and Content</div>	<ul style="list-style-type: none">• P 3.4.1 Optimize travel websites and mobile applications• P 3.4.2 Promote the establishment of Macao brand by adopting various advocacy programs

<div>Specific Actions in Focus:</div> <ul style="list-style-type: none">▪ Organize tourism promotion activities regularly targeting the Mainland China cities with relatively larger number of visitors coming to Macao or visitors have relatively higher spending capability.▪ Strengthen cooperation with e-commerce companies and online media in source markets, and gain insight into the profile of visitors in source markets.▪ Continue to promote Macao as the core city for multi-destination travels in the Guangdong-Hong Kong-Macao Greater Bay Area, and extend the length of stay of visitors.▪ Collaborate with cities in the Greater Bay Area, and discuss the hosting of international conventions and exhibitions in Macao to boost the economic development.▪ Strive for the qualifications to host regional / international professional conventions in Macao.▪ Evaluate and use new media platforms in a timely manner, and strengthen the promotion of Macao as “A Multi-cultural City”, “A Platform Between China and Portuguese-speaking Countries”, “Creative City of Gastronomy”, and “A Healthy, Safe, and Tourist-friendly Destination”.▪ Encourage gallivanter to explore niche tourist attractions in Macao, and promote them with live video streaming.
--

Plan Review and Revision

Objective 4. Optimize Urban Development Model

Planning Proposals	Phased Plans	Long-term Plans
<div>P4.1</div> <div>Develop Potential Tourism Areas into New Tourist Spots</div>	<ul style="list-style-type: none"> • P 4.1.1 Planning and use of Lai Chi Vun shipyards area • P 4.1.2 Continue to support the development and use or renovation of valuable historic buildings 	<ul style="list-style-type: none"> • P 4.1.3 Redevelopment of Inner Harbour • P 4.1.4 Reasonable planning and development of tourism areas • P 4.1.5 Promote the revitalization of areas with cultural and historical themes
<div>P4.2</div> <div>Seamless Connection with Neighboring Cities</div>	<ul style="list-style-type: none"> • P 4.2.1 Enhance the connection between Macau International Airport and other cities (new) • P 4.2.2 Push forward construction of Macao LRT Hengqin Line (new) • P 4.2.3 Enhance the connection between the airports of the Guangdong-Hong Kong-Macao Greater Bay Area and Macao 	<ul style="list-style-type: none"> • P 4.2.4 Establish a connection between Macao and the regional railway network
<div>P4.3</div> <div>Expansion of Environmental Measures</div>	<ul style="list-style-type: none"> • P 4.3.1 Expansion on “Macao Green Hotel Award” • P 4.3.2 Raise environmental standards for vehicles • P 4.3.3 Encourage hotels and tourism-related industries to adopt international green building standards 	
<div>P4.4</div> <div>Improvements in Pedestrian Environment</div>	<ul style="list-style-type: none"> • P 4.4.1 Continue to optimize pedestrian environment • P 4.4.2 Continue to improve and optimize the urban information system 	

<div>Specific Actions in Focus:</div> <ul style="list-style-type: none"> ▪ Conduct planning of urban cultural facilities in the Lai Chi Vun shipyards area. ▪ Adopt the operation model of public-private collaboration to enrich cultural tourism elements to the existing cultural and historical areas, such as Iec Long Firework Factory and Pátio da Eterna Felicidade. ▪ Boost the economic vitality of Inner Harbour area by exploring and attracting local Macao shops and eligible small and medium-sized enterprises. ▪ Push forward the construction of the Macao LRT Hengqin Line, so as to facilitate residents and visitors to travel to the Hengqin Port. ▪ Expand the carrying capacity of the airport and border crossing points, and strengthen the air transport connectivity with other cities. ▪ Continue to optimize the “Macao Green Hotel Award” program, and encourage the hotel industry to apply international green building standards to construction, and use of eco-friendly facilities. ▪ Optimize pedestrian environment, embellish the city with cultural and artistic enrichment and increase the connectivity and comfortability of the city. ▪ Set up tourism signage and urban information systems in suitable areas, and continue to optimize the urban and traffic signs.

Plan Review and Revision

Objective 5. Manage Macao’s Tourism Carrying Capacity

Planning Proposals	Phased Plans	Long-term Plans
<div>P5.1</div> <div>Design KPI to Monitor Macao’s Tourism Carrying Capacity</div>	<ul style="list-style-type: none">P 5.1.1 Optimize the annual tourism carrying capacity study	
<div>P5.2</div> <div>Site Management of Crowded Tourist Attractions and Rectification Measures</div>	<ul style="list-style-type: none">P 5.2.1 Augment with management measures on the carrying capacity of tourist attractions for the <i>Protection and Management Plan of the Historic Centre of Macao</i>P 5.2.2 Implement rectification measures for the crowded tourist attractionsP 5.2.3 Encourage visitors to divert to other tourist attractions and promote off-season tourism (new)	
<div>P5.3</div> <div>Promote Transport Improvement Policy</div>	<ul style="list-style-type: none">P 5.3.1 Continue to prepare an assessment on visitor flows and transportation capacity at tourism hotspotsP 5.3.2 Continue to optimize taxi serviceP 5.3.3 Arrange port utilization in a reasonable manner	<ul style="list-style-type: none">P 5.3.4 Support the project of Light Rapid Transit System (LRT) and the extension to all border crossing pointsP 5.3.5 Develop Macao maritime transport (new)
<div>P5.4</div> <div>Encourage Waste Reduction and Recycling in Tourism</div>	<ul style="list-style-type: none">P 5.4.1 Encourage proactive solid waste recycling in hotelsP 5.4.2 Expand solid waste recycling system to high tourism traffic areasP 5.4.3 Construct and optimize wastewater treatment plants	<ul style="list-style-type: none">P 5.4.4 Promote and implement the construction of water reclamation system

Specific Actions in Focus:
<ul style="list-style-type: none">Develop contingency plans for peak periods and emergencies, and implement crowd safety management measures according to the onsite situation at the tourist attractions.Increase nighttime activities and experiences at the tourist attractions that have relatively more visitor flows in order to reduce overcrowding during the day.Promote off-peak season tourism experiences, and encourage the industry to launch travel packages for targeted visitors.Create the conditions for residents and tourists to travel via Hengqin Port, Qingmao Port, and Hong Kong-Zhuhai-Macao Bridge Port.Promote the construction of Macao LRT, explore more lines to be developed, and enhance the connectivity and utilization of Macao LRT.In response to the development of marine tourism projects and the completion of new terminals in the future, the terminals will be utilized to develop maritime transport.Continue to encourage hotels to recycle solid waste based on the evaluation criteria of the “Macao Green Hotel Award”.Promote the construction of facilities such as water reclamation plants and pipe networks, and establish water reclamation management system and technical specifications.

Plan Review and Revision

Objective 6. Deploy and Utilize Innovative Technology

Planning Proposals	Phased Plans	Long-term Plans
<div> <div>P6.1</div> <div> Develop a Tourism Information Interchange Platform and Smart Tourism </div> </div>	<ul style="list-style-type: none"> P 6.1.1 Enhance information communication in tourism industry through cloud computing and big data 	<ul style="list-style-type: none"> P 6.1.2 Promote the mature development of smart tourism (new)
<div> <div>P6.2</div> <div> Improve Travel Experiences with Innovative Technologies </div> </div>	<ul style="list-style-type: none"> P 6.2.1 Continue to promote innovative technologies to enhance visitor experience P 6.2.2 Improve the use of network and electronic supporting facilities, and expand their coverage P 6.2.3 Assist small and medium-sized enterprises (SMEs) adopt innovative technologies (new) 	
<div> <div>P6.3</div> <div> Expand Tourism Security Systems with Smart Technologies </div> </div>	<ul style="list-style-type: none"> P 6.3.1 Continue to build and optimize the system for visitor flow management and monitoring P 6.3.2 Continue to build the <i>Macao Digital City Surveillance System</i> (“Sky Eye”) to cover tourism areas 	

Specific Actions in Focus:

- Continue to optimize and enrich data sets on the multi-functional data platform, and enhance information sharing within the industry by encouraging the industry to participate in sharing the data.
- Develop virtual reality guided tours of World Heritage tourist attractions to provide an alternative visit experience when the tourist attractions are not open to the public.
- Further increase the number of “FreeWiFi.MO” service points, and encourage more private institutions to provide free Wi-Fi services to expand Wi-Fi coverage.
- Strive to assist companies to apply more technology tools in the processes such as marketing, sales, payment and management, so as to increase the popularity of technology tools.
- Support the electronization of Macao’s food and beverage industry, and encourage more stores to use the food promotion platform and the electronic booking and ordering system to enhance visitor experience.
- Use innovative technologies to monitor tourist attractions/ congested locations, and provide predictions on the density of the visitor flow.

Plan Review and Revision

Objective 7. Enhance Tourism Industry Cooperation

Planning Proposals	Phased Plans	Long-term Plans
<div>P7.1</div> <div>Review Tourism-related Laws and Legislation</div>	<ul style="list-style-type: none">P 7.1.1 Revise the law regulating the travel agencies and tour guide profession (Decree-Law no. 48/98/M)	
<div>P7.2</div> <div>Refine the Licensing System</div>	<ul style="list-style-type: none">P 7.2.1 Introduce the temporary business license system in complementing the “Law on the Operation of Hotel Establishments”P 7.2.2 Optimize license and service application procedures	
<div>P7.3</div> <div>Optimize Cross-departmental Collaboration</div>	<ul style="list-style-type: none">P 7.3.1 Improve the tourism satellite account and other tourism-related data (new)	<ul style="list-style-type: none">P 7.3.2 Review the functions and structure of tourism authorities to support social development (new)
<div>P7.4</div> <div>Enhance Cooperation between Public and Private Sectors</div>	<ul style="list-style-type: none">P 7.4.1 Continue to discuss corporate social responsibilities and their implementation with gaming concessionairesP 7.4.2 Optimize public-private collaboration (new)	

Specific Actions in Focus:

- Promote the revision of the law regulating travel agencies and tour guide profession, and optimize market supervision.
- Review the current license application and renewal process, and launch electronic applications for various services in an orderly manner in parallel to the development of e-government.
- Continue to improve on the tourism satellite account, and optimize visitor expenditure survey data.
- Follow up on the new gaming concession contracts and carry out the related work.
- Encourage private institutions, enterprises and associations to participate in activities regarding festivals, culture, sports and other activities, and enrich the content of the activities and increase the level of contact.

Plan Review and Revision

Objective 8. Enhance Macao’s Position as a Core Tourism City in the Regional and International Tourism Arena

Planning Proposals	Phased Plans
<div>P8.1</div> <div>Strengthen Regional Government Cooperation in Key Issues</div>	<ul style="list-style-type: none"> • P 8.1.1 Continue to improve the border crossing efficiency, promote Macao and Hengqin visa facilitation measures • P 8.1.2 Expand the “Free Yacht Scheme” to cover more cities • P 8.1.3 Strengthen in-depth tourism co-operation between Macao and Hengqin (new) • P 8.1.4 Partner with other cities in the Guangdong-Hong Kong-Macao Greater Bay Area to build a unified tourism destination brand (new)
<div>P8.2</div> <div>Cooperate with Nearby Cities and Other International Cities; Jointly Develop Strategic Tourism Products</div>	<ul style="list-style-type: none"> • P 8.2.1 Continue to explore the cross boundary tourism products, and promote the joint tourism marketing • P 8.2.2 Deepen exchanges and cooperation with Portuguese-speaking countries • P 8.2.3 Organize events for Greater Bay Area cities in the fields of tourism, MICE, culture, and sports • P 8.2.4 Resume travel and people-to-people exchanges with other countries and regions (new)
<div>P8.3</div> <div>Enhance International Recognition and Influence of Macao</div>	<ul style="list-style-type: none"> • P 8.3.1 Enhance Macao’s international recognition by attaining more tourism awards • P 8.3.2 Proactively enhance Macao’s position and reputation in the international organizations

<div>Specific Actions in Focus:</div> <ul style="list-style-type: none"> ▪ Strive to gradually extend the “Free Yacht Scheme” to other destinations besides Zhongshan, especially Hengqin in Zhuhai, Qianhai in Shenzhen, Nansha in Guangzhou, and Hainan. ▪ Promote multi-destination travel for international visitors through discussions with the Mainland on improving the visa policy for international visitors to travel the Mainland from Macao. ▪ Promote the complementary development of tourism resources in Macao and Hengqin, and encourage the tourism industry to develop more high-end and joint travel routes. ▪ Proactively cooperate with museums and art galleries in the Greater Bay Area as well as other cities in the mainland to plan exhibitions or exhibit collections with each other, so as to strengthen exchanges between cities. ▪ Cooperate with Guangdong and Hong Kong to jointly promote and organize the Lingnan cultural and traditional sports events such as international dragon boat races, lion dance competitions, and traditional martial arts competitions, and build them into international sports events. ▪ Strive to strengthen communication with local tourism organizations, coordinate and promote cooperation in tourism with Portuguese-speaking countries on the basis of signing a tourism cooperation memorandum with Portuguese-speaking countries and providing training courses. ▪ Proactively participate in the meetings and activities held by the international tourism organizations to further enhance Macao’s reputation in the international tourism industry and its competitiveness in tourism destinations. ▪ As a Creative City of Gastronomy of the UNESCO Creative Cities Network (UCCN), Macao will establish friendly cooperation with other cities within the network.

6. Review and Revision of Growth Scenarios and Key Indicators



Review and Revision of Growth Scenarios and Key Indicators

Taking reference of the methods applied by the International Monetary Fund, the World Tourism Organization, and China Tourism Academy to predict the tourism development in the post-pandemic era, this review, with five years as a review period, employs the ARIMA model to predict the basic conditions and indicators of Macao tourism industry in 2025.

However, in light of the fact that tourism is susceptible to external factors and the pandemic control and prevention measures adopted across the globe also pose uncertainties to the industry, the predictions in this report are based on predicable factors, such as the change in people’s willingness to travel, the attractiveness of tourism products and services, etc. Changes resulted from a sudden outbreak, including travel restrictions, changes in entry/exit policy, pace of economic recovery, and vaccine effectiveness, are not being taken into account. Therefore, the relevant data may still be subject to change.

Forecast of growth scenarios and key indicators are presented as follows:

Key Indicators of the Tourism Industry			
	2019	2020	2025
Item	Actual Figure	Actual Figure	Prediction Range and Trend
Total Number of Visitor Arrivals	39,406,181	5,896,848	36 million - 41 million
Visitors’ Non-gaming Spending (MOP in billion)	64.08	11.94	Return to pre-pandemic level
Average Length of Stay of Overnight-stay Visitors (Days)	2.2	2.8	2.5 - 2.9
Percentage of Overnight-stay Visitors (%)	47.3	47.9	Maintain stable growth
Number of Hotel Rooms	41,148	41,884	46,800 - 53,800
Number of Employees in Tourism-related Industries *	203,200	N/A*	Return to pre-pandemic level
Hotel Occupancy Rate (%)	90.8	28.6	Return to pre-pandemic level
Per capita Spending of Visitors (MOP)	1,626	2,025	Maintain stable growth

* Latest update about tourism satellite account data: 2019



7. Conclusion and Prospect

Conclusion and Prospect

The development of a World Centre of Tourism and Leisure: With the successive promulgation of the *Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area* and the national “Fourteenth Five-Year Plan”, Macao’s urban development positioning as the World Centre of Tourism and Leisure has become clearer. At the same time, factors such as the COVID-19 pandemic, the national dual-circulation development pattern, the trend of online transformation, and the deepening of public-private collaboration have brought about immense changes to the internal and external environment pertaining to the development of Macao’s tourism industry. Our review, together with the deepening of the content of the Master Plan and adjustments to the action plans in due course, enable the development priorities and strategies to align with the latest development trends and needs.

Review of implementation: Since the issue of the *Master Plan*, the government, industry and associations have worked together with residents to achieve phased results in the development of tourism products and services, building of destination image, application of innovative technology and cross sectoral and industrial cooperation, constantly keeping up with the level of the world’s leading tourism city. As at the end of 2020, among the 69 short-term action plans proposed in the *Master Plan*, a total of 62 have reached the objective, and 22 medium- and long-term action plans have been carried out in an orderly manner. In addition, the SAR Government has conducted in-depth studies on the United Nations Sustainable Development Goals in recent years and has done a lot of work on relevant requirements and guidelines to achieve the goal of urban sustainable development.

The development prospects of tourism in the post-pandemic era: The sudden COVID-19 pandemic has severely impacted the global tourism industry. In particular, it has exposed the problems of a simple industrial structure dominated by the gaming sector and insufficient diversification of source markets in Macao. On the other hand, the “contactless” service model triggered by the pandemic, the evolution and iteration of information technology, and the promotion of online live streaming and social platforms have all provided new ideas for Macao to enrich its tourism product portfolio, improve its service quality, and increase its international reputation and influence. As the pandemic situation is basically stable, the government, industry and residents are cautiously optimistic about the recovery and development prospects of Macao tourism industry, and actively promote the construction of a World Centre of Tourism and Leisure.

Extend the tourism industry chain to promote a moderately diversified economy: “Tourism +” uses tourism as a carrier to drive the development of emerging industries such as sports, MICE, comprehensive health, education services, and cultural creativity, and is one of the main measures to promote a moderately diversified economy in Macao. The addition of new industry elements can also supplement and enrich existing tourism products, thereby attracting more tourists to Macao and extending their stay. In the future, Macao will continue to explore the cross-border integration of “Tourism +”, strive to enrich the form of the tourism industry and promote the common development of leisure tourism and various emerging industries.

Regional tourism cooperation opens a new chapter: The development of Macao’s tourism industry is closely related to Hengqin, the Guangdong-Hong Kong-Macao Greater Bay Area and the countries along the “Belt and Road” Initiative. In the future, based on common tourism resources and historical and cultural backgrounds, Macao will deepen regional tourism cooperation in various aspects such as system and mechanism, infrastructure, publicity and promotion, tourism cooperation and “Tourism +” industry synergy, so as to achieve the development vision of “regional mutual benefit and win-win cooperation”.

Conclusion and Prospect

Speed up the development of smart tourism: Strengthening the application of IT to create a smart tourism destination is one of the important strategic measures for Macao to build a World Centre of Tourism and Leisure. Innovation and transformation need to be carried out at multiple levels from planning, management to implementation throughout the process. In addition, collaboration and exchange of information between public and private sectors should also be emphasized. In the future, Macao will actively learn from the successful experience of smart tourism destinations at home and abroad to promote its construction of smart tourism, continue to enhance the tourist experience through smart tourism applications and improve the efficiency of supervision, so as to build a comprehensive smart tourism ecosystem.

Sustainable development of tourism: The COVID-19 pandemic has provided an important time window for Macao to re-examine its tourism carrying capacity, establish visitor flow monitoring and response measures and improve infrastructure. In the process of Macao tourism industry gradually returning to its pre-pandemic level, its development must be balanced with the local natural resources, the residents' quality of life and social development. In the future, the government and the tourism industry will work hard to reduce the negative impact brought by the development of the tourism industry, proactively implement the United Nations Sustainable Development Goals, and allow the tourism industry to truly benefit, facilitate and serve the people.

Implementation of the adjusted *Master Plan*: The adjusted *Master Plan* revised relevant action plans and key performance indicators based on the latest development and trends in the tourism industry. In the future, it is necessary to continue to conduct annual assessment, review again at the appropriate time, and adjust the focus and direction of work in due course. The review and implementation of future planning recommendations still require the cooperation of relevant government departments, enterprises and residents to overcome different difficulties and obstacles and accelerate the realization of the overall strategic goal of building Macao into a World Centre of Tourism and Leisure.

Flexible response to crises and challenges: Although the pandemic situation in Macao has stabilized, the global pandemic prevention and control situation is still severe, which has brought many uncertainties to the development of Macao's tourism industry. The flexible use of innovative safety technologies and the strengthening of public-private collaboration can effectively reduce the negative impacts of emergencies on Macao's tourism industry. In the future, Macao will continue to track and analyze the basic data of the tourism industry, quickly identify various opportunities and challenges, and adjust the strategies, indicators and related action plans in the *Master Plan* in due course to continuously enhance the overall crisis response capability of Macao's tourism industry.

Outlook to a bright future: After more than ten years of endeavor, Macao has entered the stage of comprehensive development of the "World Centre of Tourism and Leisure". Along with the rapid development of Macao's tourism industry and the city's infrastructure construction, the economic and industrial structure and cross-departmental cooperation models have been further optimized, the interconnectivity between Macao and the surrounding areas and its international reputation and influence have also been effectively improved. Although there are bound to be different challenges in the future development process, the government, tourism industry and residents will proactively respond to and seize opportunities to jointly contribute to the prosperity and development of the tourism industry and the city as a whole.



List of Review Team

Commissioning Entity	Macao Government Tourism Office
Review Study Team	Deloitte Advisory Services Limited

Acknowledgement

The review of the *Macao Tourism Industry Development Master Plan* has received the participation and support of many tourism industry stakeholders. The Macao Government Tourism Office would like to deliver gratitude to the organizations and government departments that provided assistance and recommendations in the planning process.

Government Entities/Advisory Committees	
Public Administration and Civil Service Bureau	Municipal Affairs Bureau
Economic and Technological Development Bureau	Gaming Inspection and Coordination Bureau
Labour Affairs Bureau	Macao Trade and Investment Promotion Institute
Monetary Authority of Macao	Science and Technology Development Fund
Statistics and Census Service	Consumer Council
Permanent Secretariat of Forum for Economic and Trade Co-operation between China and Portuguese-speaking Countries (Macao)	Unitary Police Service
Public Security Police Force	Education and Youth Development Bureau
Cultural Affairs Bureau	Sports Bureau
Health Bureau	Cultural Industry Fund
Macao Institute for Tourism Studies	Land, Public Works and Transport Bureau
Marine and Water Bureau	Environmental Protection Bureau
Transport Bureau	Civil Aviation Authority
Macao Post and Telecommunications Bureau	Infrastructure Development Office
Talents Development Committee	Tourism Development Committee

Note: Sorted by Macao SAR Government Portal order

Acknowledgement

Expert Representatives	
Fong Ka Chio	Tong Kai Chung
	Fanny Vong Chuk Kwan
Industry Organizations	Professional Groups/ Associations
East Asia Airlines Limited	Macao Chamber of Commerce
Galaxy Entertainment Group Limited	Macao Federal Commercial Association of Convention & Exhibition Industry
Melco Resorts & Entertainment Limited	Macao Cross-border E-Commerce Industry Association
MGM China Holdings Limited	Macao Retail Management Association
Sands China Limited	Macao Economic Association
Shun Tak China Travel — Companhia de Gestão de Embarcações (Macau)	The Industry and Commerce Association of Macau Northern District
SJM Resorts, S.A.	Macao Development Strategy Research Centre
Wynn Resorts (Macau), S.A	Macao Productivity and Technology Transfer Center
Yuet Tung Shipping Co., Ltd	Macao Youth Federation
	Macao Urban Planning Institute
	General Union of Neighbourhood Associations of Macao

Note: Sorted by alphabetical order of Portuguese or English name

In addition to the above organizations/ associations, the Macao Government Tourism Office would like to express the gratitude to the citizens, departments, entities and organizations that have contributed feedback through various channels during the preparation of the report in the review period.

Terms of Use and Disclaimer

• Copyright

The *Macao Tourism Industry Development Master Plan - Review Report* is published by the Macao Government Tourism Office (MGTO). The copyright and other rights to all materials in this report shall be owned by the Macao Government Tourism Office or the data providers. Without the permission of the MGTO, all or part of the data in the report, including but not limited to all texts, data, signs, images, maps and pictures, are not allowed to be reprinted, reproduced, or published.

• Limited License

Any organization or individual who needs to quote any content in this report must indicate the MGTO as the data source, and shall not use the data to mislead or deceive anyone in any way.

• Disclaimer

The MGTO has made every effort to ensure the accuracy and completeness of the information and content in this report, but it makes no express or implied guarantee for the accuracy or completeness of the data. If there are any errors or omissions in the data, the MGTO will not bear any responsibility.

• Major version

The review report is available in Chinese, Portuguese and English. If there is any conflict or inconsistency between the versions, the Chinese version shall prevail.

Title: Macao Tourism Industry Development Master Plan – Review Report
Publisher: Macao Government Tourism Office
Editor: Organisational Planning and Development Department
Review Entity: Deloitte Advisory Services Limited
Edition date: November 2021
(Not for sale)
ISBN 978-99965-62-43-3



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

ISBN 978-99965-62-43-3



9 789996 562433