



澳門旅遊業發展總體規劃

Macao Tourism Industry Development Master Plan

Summary Report



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

September 2017

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FOREWORD

The tourism industry has always been one of the most important industries driving economic progress in Macao. Ever since the establishment of the Macao Special Administrative Region (Macao SAR), the Central Government has been showing its full support to Macao. In particular, special emphasis has been placed on the development of the city's tourism industry, which has been a catalyst for continued growth over the last decade.

The Belt and Road initiative of the Central Government and the Macao SAR's vision to become the "World Centre of Tourism and Leisure" provide local tourism industry the new opportunity of development. In 2015, the Macao Government Tourism Office (MGTO) initiated the "Macao Tourism Industry Development Master Plan" (the Master Plan) project. The objective of the Master Plan is to build and manage its tourism economy and to provide a blueprint for the future development of Macao's tourism industry over the next 15 years. The Master Plan exists under the overall framework of the "Five-Year Development Plan" (2016-2020) of the Macao SAR Government, which ensures that the tourism industry development and growth are in line with the national and the SAR Government's long-term development vision.

The study process of the Master Plan involved a variety of components, including international forums, public surveys, site visits, interviews and benchmark analyses. Beginning with a comprehensive situational assessment of all facets of Macao's tourism industry, the city's major key issues, competitive strengths, challenges and potentials, relevant strategies and planning proposals were formulated. As the tourism industry is intrinsically linked to the everyday lives of Macao's residents, an extensive two-month public consultation was held to collect opinions and suggestions from the public, industry partners and professional associations.

After two years of efforts from a multitude of different parties, the Macao Tourism Industry Development Master Plan has been finally completed in 2017. The Master Plan combines the inputs and comments from various industry stakeholders including experts in the tourism field, related government agencies, industrial partners, professional associations, and the local community. The Master Plan puts forward 8 key objectives, obtainable through 33 strategies and 91 short-, medium-, and long-term actions plans. It is a comprehensive plan that touches on all facets of the tourism industry and will serve as an organised and consolidated road map for the future development of Macao's tourism industry. The Master Plan will serve as a guideline for a variety of major subject areas, including Tourism Resources and Products System, Tourism Quality and Services System, Tourism Branding and Marketing Strategies, Tourism Industry and City Development, Tourism Carrying Capacity, Tourism and the Application of Innovative Technology, Tourism Industry Cooperation System, International and Regional Tourism Cooperation and Development.

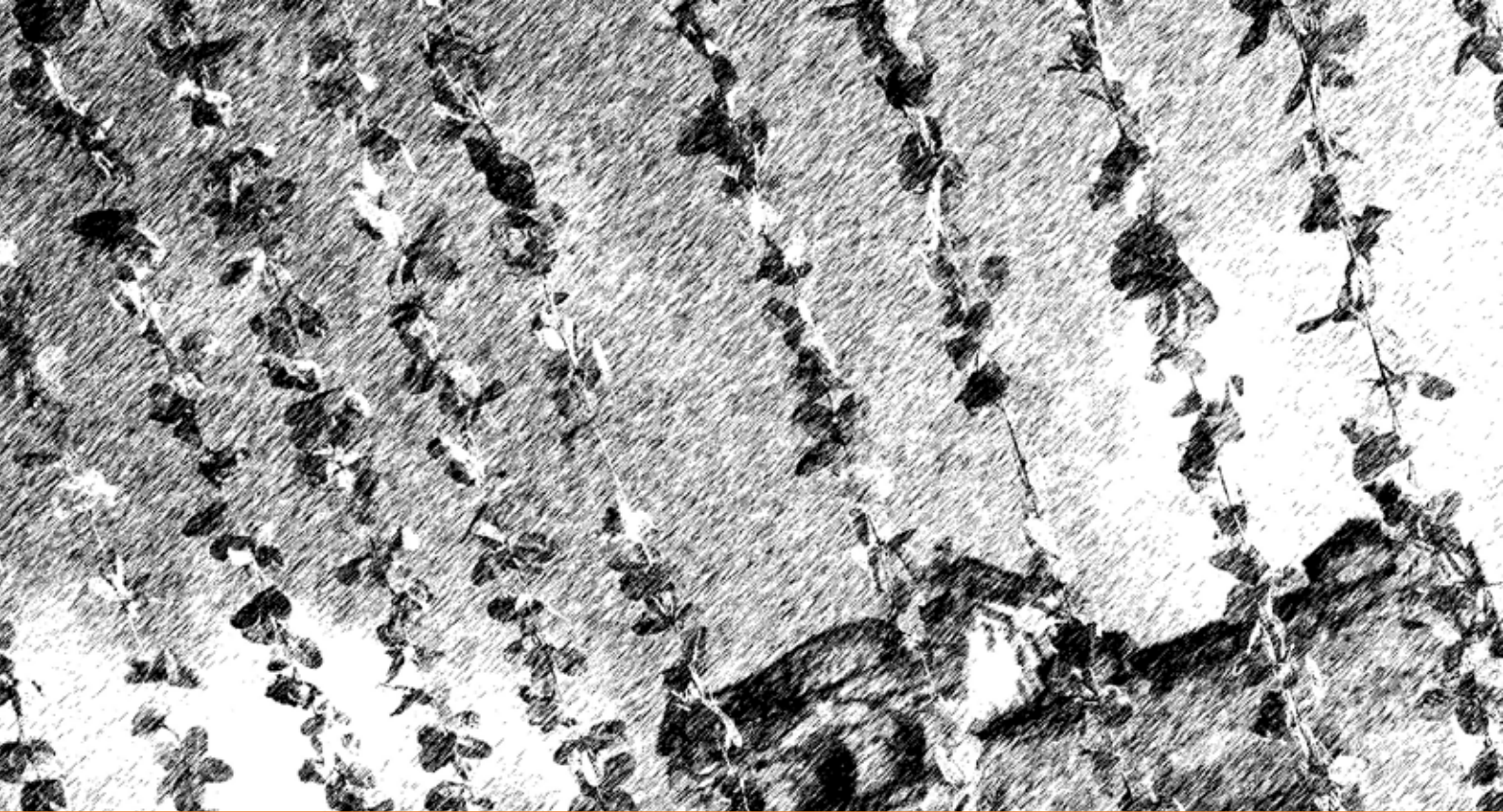
In the near future, MGTO will begin carrying out the action plans based on the objectives and planning proposals outlined in the Master Plan, to ensure the sustainable and diversified growth of the Macao's tourism industry. At the same time, the Master Plan will be constantly reviewed and improved, in accordance to the ever changing external environment. This Master Plan will help to steer tourism related developments in the city to be in line with the Macao SAR's vision to become the "World Centre of Tourism and Leisure".



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1. PLANNING BACKGROUND



PLANNING BACKGROUND

Effective Initiatives to Drive Tourism Growth for Macao

Since its early days as a trading port and historical gateway between China and Europe, Macao's tourism industry has been developed for over a century and is now one of the city's pillar industry. The unique blend of Chinese and Portuguese cultures has drawn visitors and business people from all over the world. With the opening up of travel trade, improvements in infrastructure and steady economic growth, the tourism industry in Macao has been growing exponentially.

As a result of the continuous growth of outbound tourism in different parts of the world, Macao's tourism industry has significant development

potential. However, the city faces certain constraints such as limited land, lack of human resources amongst other areas. To support the Macao SAR's vision of becoming the "World Centre of Tourism and Leisure", MGTO initiated the Macao Tourism Industry Development Master Plan Project in 2015. The objective is to carry out a comprehensive study and to provide a guideline for the development of Macao's tourism industry for the next 15 years. Presented with detailed objectives, strategies and specific action plans, this Master Plan will serve as a tool, guide and reference point for all future tourism-related development measures and to drive sustainable growth for Macao.



PLANNING BACKGROUND

Positioning Macao as the World Centre of Tourism and Leisure

In 2011, the 12th Five Year Plan for the National Economic and Social Development of the People's Republic of China announced the Central Government's support for positioning Macao as the "World Centre of Tourism and Leisure". In 2016, the 13th Five Year Plan has further reassured this positioning.

As the bridge between the East and West for mutual

understanding and cultural exchanges, Macao has developed into a world famous tourist destination. Macao's positioning as the World Centre of Tourism and Leisure is in line with the trends of our time and the SAR's strategy of economic diversification. The vision in the tourism area is to elevate the city to the next level as a world-known tourist destination with impressive tourism products and rich leisure experiences.



PLANNING BACKGROUND

Tourism Industry and Macao SAR's Five-Year Development Plan

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

In the future, Macao will strive to become a world-class tourism city where its people can enjoy international standards of living, work, transportation, tourism and entertainment, and Macao will be developed into a livable city and tourist destination which is safe, healthy, convenient, and environmentally friendly.

Under the guidance of the "Five-Year Plan", the Macao Tourism Industry Development Master Plan formulates goals and strategies in line with the SAR Government's development vision. In addition to the analysis of the current situation of Macao's tourism industry, the Master Plan proposes short-, medium- and long-term strategies which cover all relevant facets of the tourism industry. These strategies echo the development goals in the "Five-Year Plan", including "gradual formation of business environment for tourism and leisure industries", "enhancement of the overall development of the tourism industry" and "fostering new development of cultural tourism".

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

- Stable development of the overall economy
- Further optimisation of industrial structure
- Gradual formation of business environment for tourism and leisure industries
- Continual improvement of the people's quality of life
- Continuous development in culture and education
- Efficient and effective environmental protection
- Further improvement in administrative efficiency and legal governance





2. GUIDING PRINCIPLES FOR THE MACAO TOURISM INDUSTRY DEVELOPMENT MASTER PLAN

GUIDING PRINCIPLES FOR THE MACAO TOURISM INDUSTRY DEVELOPMENT MASTER PLAN

Promoting the development of “holistic tourism destination” is the new positioning under the national tourism development strategy, to achieve a full range of optimisation and upgrade in the tourism industry as well as creating integration and co-development within the region. Macao has been an open tourist destination, all the attractions are spatially well connected, which is in line with the “holistic tourism destination” development concept. Meanwhile, the Macao SAR Government continues to enrich its tourism offerings, increase efficiencies and promote

innovation with the aim of diversifying tourism products and exploring new visitor source markets.

Under the development concept of “holistic tourism destination” with the realisation of the vision of “World Centre of Tourism and Leisure”, and the ensuring of a livable and travel friendly city, the Master Plan has adopted the following guiding principles which serve as the basis in confirming the development objectives and formulating the strategies for Macao’s future tourism industry:



Business Environment for the Tourism and Leisure Industries

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



Quality Tourism

Training provision and continuous management of the tourism industry can upgrade the overall service quality. This can help to promote the industry to meet international standards. Together with the investment and construction of various integrated resort facilities, it gives the opportunity to maintain and improve the quality of tourism products.



Cultural Tourism

Elaborate the uniqueness of Macao’s history and culture, as well as create a culturally diverse destination with rich content. Continue to nurture the city’s culturally diverse and rich tourism experience for attracting the worldwide visitors and fostering development of the creative industries of the city.

A black and white photograph of a classical building facade, featuring a row of columns and windows. The image is overlaid with a solid green horizontal band across the middle. The text "3. STUDY PROCESS" is centered within this band in white, uppercase letters.

3. STUDY PROCESS

STUDY PROCESS

The compilation of the Macao Tourism Industry Development Master Plan involves different processes, including site visits, international forums, interviews with key stakeholders, the two-month public consultation amongst other inputs. Starting with a comprehensive situational assessment of all

facets of Macao's tourism industry, the key issues, competitive strengths and challenges are identified, and the relevant strategies and planning proposals are formulated and presented. The overall process was organized into three phases, and the key actions and deliverables are as follows:



STUDY PROCESS

Phase II

Public Consultation and Stakeholders' Inputs

1. Public Consultation and Consolidation of Public Inputs (1,185 Public Responses)
2. Stakeholder Workshops
3. Site Visits (9 Sites / Attractions)
4. International Forum (8 Experts)
5. Interviews with Government Departments and Stakeholders (18 Interviews)
6. In-depth Study of International Best Practices (63 Cases)
7. Surveys (500 Visitors)
8. Experts Panel Review (4 Experts)

Key Deliverables

Macao Tourism Industry Development Master Plan
- Consultation Paper
Phase 2 Report



Phase III

Final Consolidation and Recommendation

1. Interviews with Government Departments and Stakeholders (18 Interviews and 42 Responses)
2. Experts Panel Review (6 Experts)

Key Deliverables

Compilation Report of Public Opinions
Macao Tourism Industry Development Master Plan
- Comprehensive Report
- Specific Topic Reports
- Summary Report

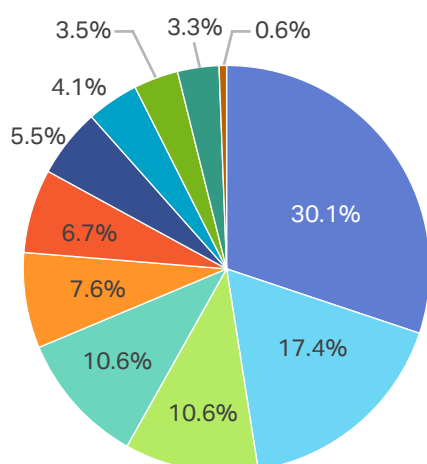


STUDY PROCESS

Public Consultation

Among the various study methodologies of the Master Plan, the public consultation was one of the most critical inputs to the study. The public consultation was conducted from 23rd May to 22nd July, 2016. Suggestions and comments of the public, including different stakeholders, industry participants and members of the local community were collected through various methods, including consultation sessions, roadshows, website, etc. Upon completion of the public consultation, public inputs were reviewed and analysed to provide strategies and proposals for ensuring the sustainable development of the tourism industry.

A total of 1,185 responses was collected in the public consultation, which was further classified into 11 categories. The majority of the comments relate to 4 categories: tourism resources and products, city development, visitor source markets and target segments, and tourism quality and service.



Public Consultation Responses by Topic

Tourism resources and products	30.1%
City development	17.4%
Visitor markets and target segments	10.6%
Tourism quality and service	10.6%
Others	7.6%
Marketing and promotion	6.7%
Tourism management	5.5%
Tourism development strategies	4.1%
Tourism branding and city positioning	3.5%
Regional tourism cooperation	3.3%
Current tourism development condition	0.6%



STUDY PROCESS

International Forums

There were two international forums held in Phase 1 and Phase 2 respectively, with the purpose of generating ideas and feedback from international experts, tourism related government departments and organisations with in-depth knowledge of the tourism industry in Macao. Through brainstorming, exchange of ideas and sharing, the international forums provided the opportunity to develop effective strategies and action items which are beneficial to the future development of Macao's tourism industry.

International Forum I :

Organized on 10th September, 2015, this international forum targeted to explore the potential and development direction of Macao's tourism industry, and the opportunities and challenges of positioning Macao as the "World Center of Tourism and Leisure". The forum invited experts from different tourism areas, including tourism resources and products, transportation and infrastructure, tourism branding and marketing, innovative technology and regional cooperation. Some of the major issues discussed during the first forum included:

- Goals and key performance indicators of "World Center of Tourism and Leisure";
- Development of the preliminary planning proposals and action items.



International Forum II :

The second international forum was held on 25th-26th February, 2016 and invited the participation of visiting international experts, tourism-related government departments and industry organizations to explore different development scenarios and the corresponding strategies and implementation actions. This forum also conveyed the importance of effective cooperation among different departments and sectors. While many key topics were discussed over the two days, the focal of the second international forum were to:

- Explore the variation in terms of products, city development, branding, marketing, regional cooperation and requirement to tourism service quality in different development scenarios;
- Discuss the implementation of best practices and solutions;
- Formulate the framework for key performance indicators for future development of Macao.

STUDY PROCESS

Survey

To better understand the perceptions and satisfaction levels of the Macao's tourism industry, in the perspective of both local residents and visitors, two sets of visitor surveys (conducted by face-to-face interviews) and one resident survey (by telephone) were compiled during the study process. Combining the survey results and internal assessments of Macao's current tourism environment, recommendations for further improvement have been put forward in the Master Plan.

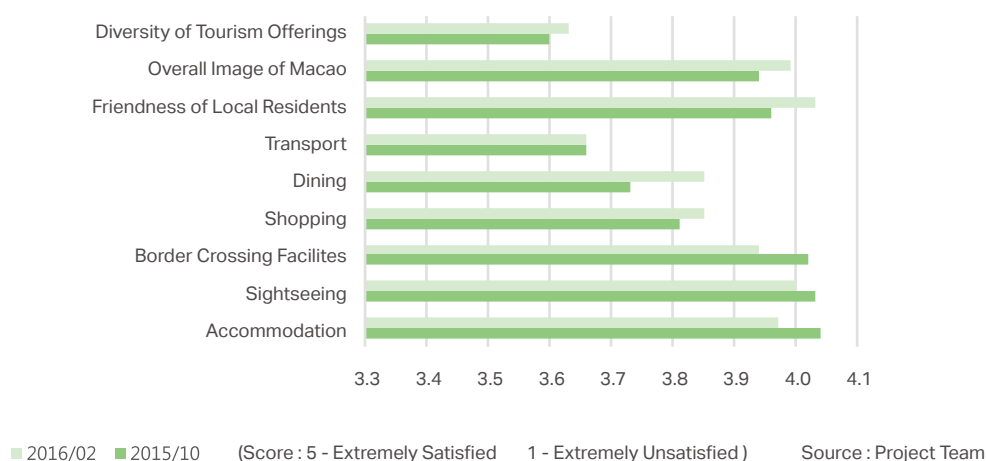
Visitor Survey

The two sets of visitor surveys were conducted from 8th to 17th October 2015 and from 12th to 20th February 2016. In order to capture a fair picture, the first survey was conducted during the off-peak season while the second was conducted during the peak tourist season. The surveys were conducted by distributing questionnaires to randomly sampled visitors set aged 18 and above at major ports of departure. A total of 500 valid responses were collected from each of the two survey periods. The goal of the survey was to understand visitors' travel behaviours, experiences and perceptions towards tourism in Macao, satisfaction levels and demands. The insight provided by the surveys would raise key issues and facilitate discussion for improvement of service quality and the standard of Macao's tourism.

Key Findings:

- In general, visitors were satisfied with their travel experience in Macao. Satisfaction levels were particularly high in fields such as accommodation, tourism attractions and border check points.
- The result shows that visitor satisfaction levels ranked lowest in the areas of transportation and the diversity of tourist offerings in the city. This indicates room for improvement in the transport infrastructure and highlighted the importance of diversified tourism products.
- Other major issues raised by visitors pertained mostly to the high level of crowds at major attractions, and the perceived high cost of hotels and restaurants. These are additional issues that require attention and actions to mitigate.

Visitor Survey - Satisfaction Levels towards Tourism Service Quality in Macao



STUDY PROCESS

Survey

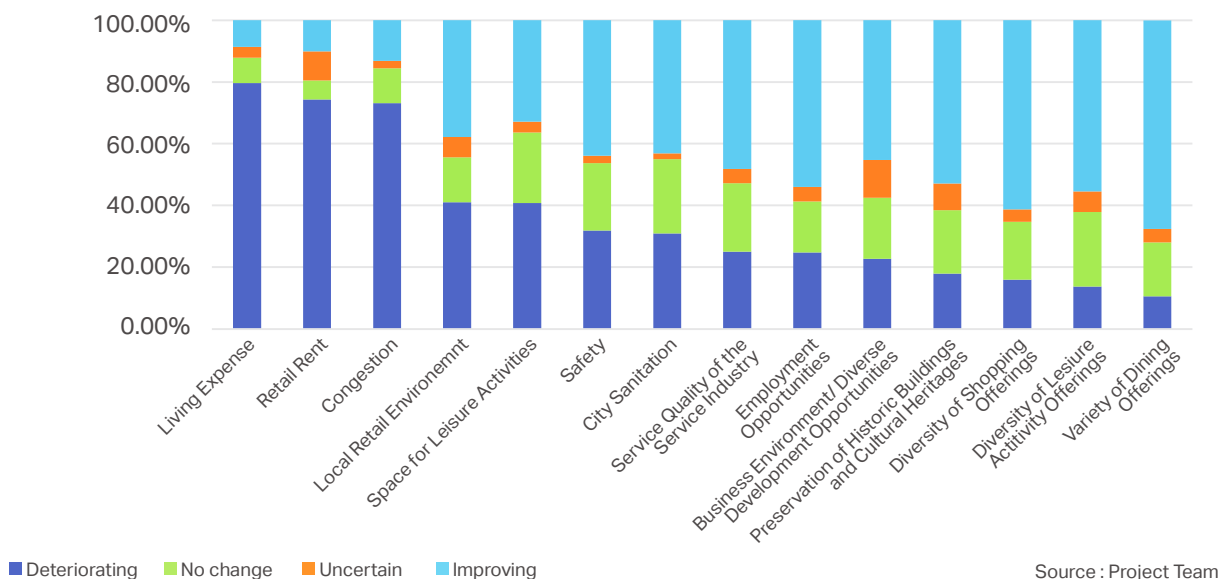
Resident Survey

The resident survey was conducted by phone interviews from 31st July to 1st August in 2015, with a total of 508 valid responses collected. The objective of the resident survey was to determine the viewpoints of local residents on five specific tourism-related issues. These issues revolved around the impact of tourism on living, traveling, working, transportation and entertainment in Macao and how they have affected their everyday lives, both for better or for worse.

Key Findings:

- The majority of residents supported Macao's positioning as the World Center of Tourism and Leisure, and many of them were personally proud of the city's achievements to date. Local residents were also generally satisfied with the current tourism development of Macao.
- A total of 14 indicators were investigated in order to determine the effect of the tourism industry on local residents. The top three issues that were raised were inflating living costs, high levels of retail rent and traffic congestion.
- The most frequent complaint was that of increased traffic and congestion due to growing tourism in the city. Many residents felt that this was an area that requires significant improvement should the vision of developing Macao into the World Center of Tourism and Leisure be realized. It was commonly suggested that the public transport network should be improved to meet the demands from both the residents and visitors. Additionally, respondents also expressed concerns over issues like ever growing visitor arrivals, inadequate traffic control in tourist hotspots, room for improvement for border crossing facilities and lack of diversities in attractions and activities.
- It was also noted that service quality should be improved, in particular towards the service providers in certain sectors, such as tour guides and taxi drivers.

Resident Survey – Perception of Impact from Tourism



Source : Project Team

STUDY PROCESS

The Master Plan is developed with four key processes. With the extensive situational analysis and valuable inputs from the experts and stakeholders, the key issues on the global and Macao tourism trends were identified. The local community and related stakeholders played an important role. Sufficient communication with the stakeholders and collection of their recommendations were ensured thorough the study process. The identification of key issues brought out the important objectives which are specified in the case of Macao, followed by the development of strategies and action plans which facilitate the implementation to achieve the vision of becoming the World Centre of Tourism and Leisure in tourism area.



Macao as the World Centre of Tourism and Leisure





4. COMPREHENSIVE ANALYSIS



COMPREHENSIVE ANALYSIS

Key Issues in the Tourism Industry of Macao

Through accessing the underlying environment of Macao's tourism industry and incorporating recent and future trends in the global tourism landscape, together with the findings from interviews with stakeholders, international forum and advice from tourism industry experts, 10 key issues pertaining to the tourism industry were identified.



COMPREHENSIVE ANALYSIS

1. Balancing between Tourism and Social Development

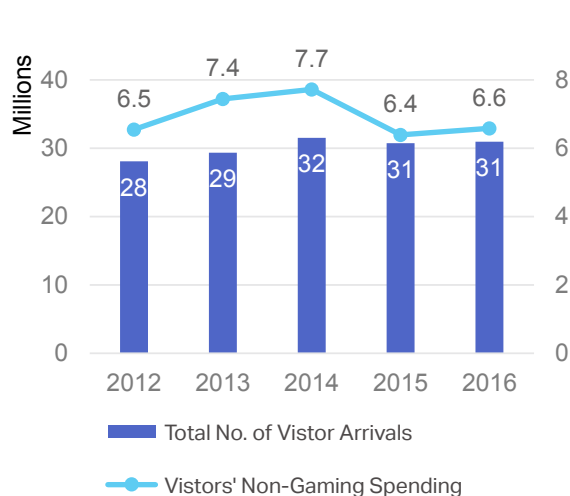
Tourism industry development can have both benefits and negative impacts:

Inbound tourism can bring in numerous positive impacts to the local community, including economic benefits such as employment opportunities, business growth, tax revenue and funding for public programmes. There are also social benefits in having a strong tourism industry which include cultural exchange and opportunities for personal skill development. However, the influx of visitors can also lead to competition over resources and facilities, high living cost, crowdedness amongst a host of other issues.

Current Situation, Opportunities and Challenges

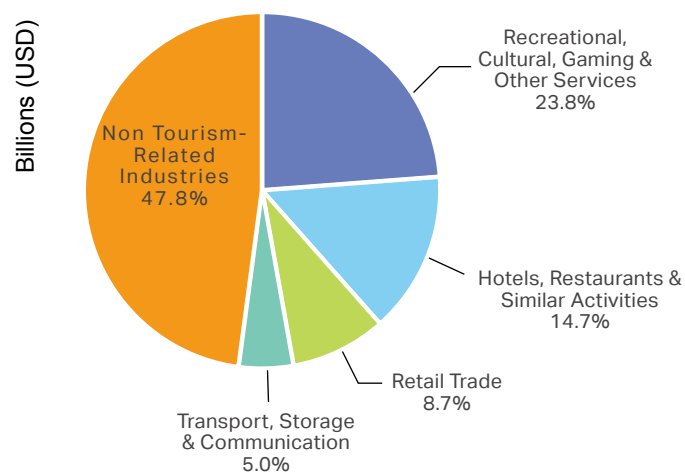
- With annual visitor arrivals at around 30 million, Macao is receiving a substantial amount of visitor spending which is an important source of tax revenue, and indirectly leads to more funding for different enhancement programmes.
- The local community is benefitting from the rapid tourism growth. The tourism industry provides a wide range of employment opportunities, where the industry alone accounts for more than 50% of all jobs in Macao.
- With the continuous growth of tourism, local populations who are participating in the industry can receive self-development opportunities through training, skills upgrading and programmes.
- Despite the various benefits brought by tourism development, there is a growing concern that tourism is also causing problems like site crowdedness, transportation congestion and deteriorating quality of life.

Total No. of Visitor Arrivals and Vistors' Non-Gaming Spending in Macao (2012-2016)



Source: Statistics and Census Service

Employed Population by Industry in Macao (2016)



Source: Statistics and Census Service

COMPREHENSIVE ANALYSIS

2. Harnessing the Surge in Regional Tourism

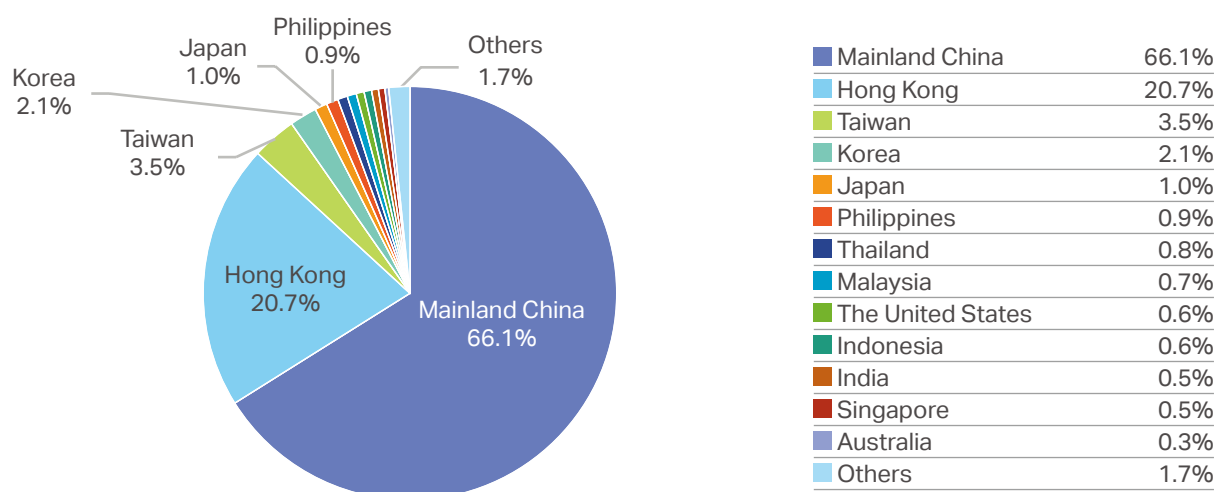
Regional tourism is increasing, there is opportunity for Macao to harness these new source markets:

Following the recovery of global economies and an increase in disposable incomes, Asia has become a fast growing outbound tourism market. The introduction of low-cost carriers has made short-haul travels more favorable and has further facilitated regional tourism in Asia. Macao should seize on the opportunity and proactively develop outreach strategies for these emerging markets.

Current Situation, Opportunities and Challenges

- According to the Pacific Asia Travel Association (PATA), the Asia Pacific region will experience a continual growth in tourism arrivals, with over 60% of them are regional travellers from the Asian source markets.
- Macao is a regional tourism hub, over 90% of the total visitors are from Asian countries. The growth in regional tourism indicates a significant opportunity for Macao's tourism industry.
- Macao has its own Overseas Representatives in various source markets to provide customized marketing support and timely responses to any market changes. In the future, the role of these representatives should be strengthened in order to further promote regional travels to Macao.
- As a response to the surge in regional tourism, additional border crossing facilities are being constructed or upgraded so as to achieve seamless connectivity between Macao and its neighbouring cities. Of paramount importance is the Hong Kong-Zhuhai-Macao Bridge which will drastically improve Macao's accessibility, from Hong Kong and other cities in the Pearl River Delta region.
- The ongoing expansion of the Macao International Airport gives potential for the city to expand its air connectivity within the region.

Visitor Arrivals by Source Markets to Macao (2016)



Source: Statistics and Census Service

COMPREHENSIVE ANALYSIS

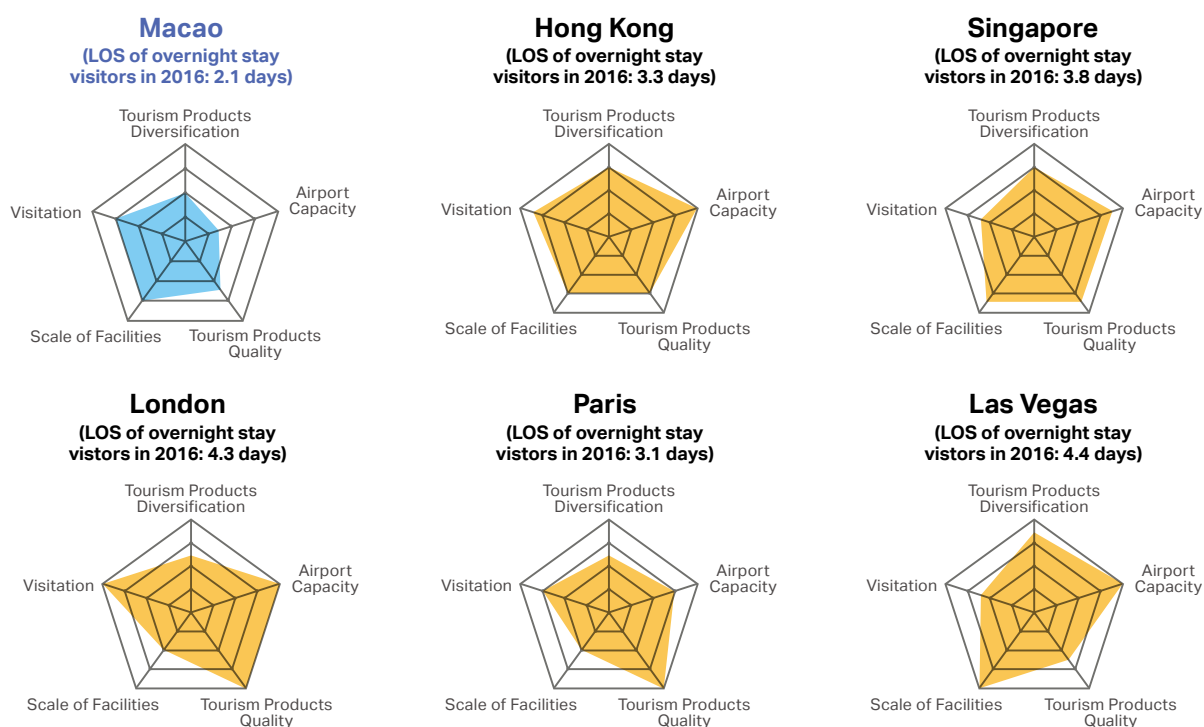
3. Responding to the Growing Competition in Tourism

Competition in the tourism industry is rising:

As more countries are relaxing visa applications, building transportation infrastructure and undertaking active marketing and product development, Macao is faced with greater competition from these rising competitive destinations. Visitors from Mainland China, which is the major source market to Macao, are showing a shift in preference towards international travels. The development of large scale integrated resorts in other regional destinations has also further intensified competition.

Current Situation, Opportunities and Challenges

- Compared with other world-class tourist destinations, such as Hong Kong, Singapore, London, Paris and Las Vegas, the average length of stay for overnight stay visitors to Macao is relatively low. Macao needs to learn from other world famous tourism cities, especially in the area of tourism product diversification, in order to retain the visitors and extend their length of stay.
- For a destination to be considered competitive, high service quality is to be expected. Currently, Macao has a QTSAS* program to encourage enhancement of service quality in the tourism industry. A continual expansion of the scheme would be beneficial for further improvement.
- The use of new technologies for marketing and product development can help to differentiate Macao from its competitors. Macao needs to continually update its utilisation of technologies to facilitate effective tourism development.
- Macao is continually establishing networks with regional and international partners which could increase the international exposure of Macao tourism and increase the city's competitiveness.



*QTSAS represents the "Quality Tourism Services Accreditation Scheme" launched by the Macao Government Tourism Office.

Source: Project Team

COMPREHENSIVE ANALYSIS

4. Increasing the Value of Tourism

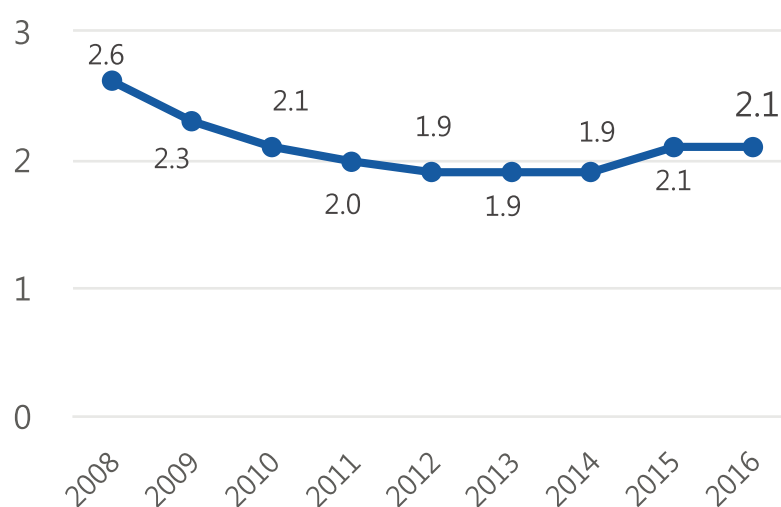
Rich tourism offerings can increase visitors' intention to stay:

The improvement in transportation has made it easier for people to travel, but this has also resorted in the increased popularity of short-haul and short-stay travels. In order to maximise the value of tourism, one key strategy would be to extend the visitors' length of stay by developing diverse entertainment facilities and services in order to provide sufficient content for a multi-day itinerary.

Current Situation, Opportunities and Challenges

- Macao's average length of stay has shown a downward trend in recent years, despite the decline has stabilised in 2013-2014 and showed a slight upward rebound from 2015.
- Overnight stay visitor per-capita spending in Macao was MOP 2,681 in 2016, which is lower compared with other international tourist destinations such as London, Paris, Las Vegas, Hong Kong and Singapore. Currently, Macao is proactively developing new products and marketing approaches to develop the city as a multi-day destination, with the purpose to increase visitor spending during their stay in Macao.
- Macao has abundant tourism resources with a mix of cultures, luxury, leisure and entertainment which indicate Macao's potential on developing diversified products and extending visitors' travel duration.
- Macao has multiple large scale integrated resorts with live performances, shopping, and dining, which provide visitors with multi-dimensional entertainment and cultural experiences.

Average Length of Stay – Overnight Stay Visitors (2008-2016)



Source: Statistics and Census Service,
Public Security Police Force

● Average Length of Stay of
Overnight Stay Visitors (Days)

COMPREHENSIVE ANALYSIS

5. Utilising Innovative Technology

The advancement of technology has huge implications on the tourism industry:

Technology is playing a paramount role in the tourism industry as it is involved in almost every facet of a trip from researching itineraries to making bookings, as well as boosting marketing effectiveness and operation efficiency. As visitors are becoming increasingly tech-savvy and more reliable on technology, transforming Macao into a smart tourist destination is crucial to respond to the trend.

Current Situation, Opportunities and Challenges

- Currently, the MGTO website is available in 15 languages to cater the needs of different tourism source markets. Three related mobile apps are also available to download for easier access to information. Additionally, government bodies and other tourism entities in Macao provide their own apps to facilitate quick and convenient information searching for visitors.
- The “Wi-Fi Go” program launched by the Macao SAR Government has provided free wireless internet access in about 200 public hotspots. A continuous expansion on the service coverage and upgrade in quality is needed to facilitate those plans of enhancing visitor experience.
- The application of innovative technology in tourism facilities, attractions and street signage has begun to develop.
- Cashless payment and smartcards are not widely practiced by visitors in Macao. There is room for development and improvement to encourage more convenient transaction means.
- Currently, Macao has no integrated system managing all the travel related information. A world-class destination needs to develop a centralized platform to enhance operational efficiency and visitor experience.



COMPREHENSIVE ANALYSIS

6. Spurring Diversity of Tourism Products

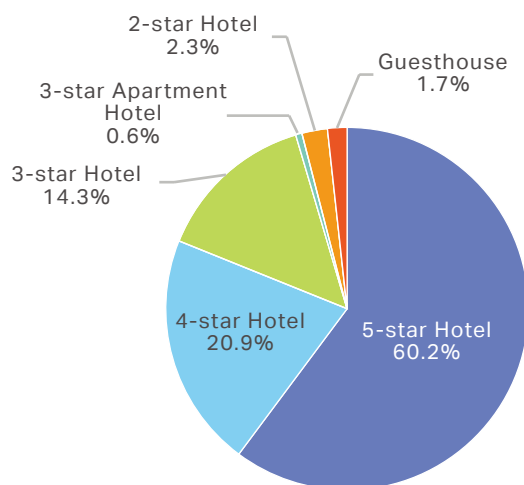
Visitors are becoming increasingly well-travelled and destinations need to provide a complete experience to remain competitive on the global stage:

With globalisation taking off, high expectation from visitors is a driving force for destinations to constantly improve and provide unique experiences. The ability to showcase multi-dimensional experiences with a mix of hospitality, shopping, dining, and distinctive cultural and entertainment options is crucial for a destination to maintain its competitiveness and attract repeat visitors.

Current Situation, Opportunities and Challenges

- The UNESCO World Heritage site and the sea area recently under administration of Macao provide a foundation for diversifying tourism products.
- At present, the tourism products provided by Macao mainly include culture, MICE, gaming, shopping, and festivities. Among these, the World Heritage site and integrated resorts are the most popular attractions. In the meantime, Macao is undergoing a process to broaden its selection of tourism products.
- The accommodation option in Macao is dominated by 5-star hotels. A share of around 60% of total hotel rooms indicates an imbalance of hotel and lodging facilities.
- According to ICCA statistics, Macao is lagging behind other regional competitors in Asia in terms of number of meetings.
- Macao lacks a portfolio of diversified shopping centers and large scale family-oriented attractions. Stronger development projects and marketing campaigns are needed to enrich Macao's tourism offerings.

Hotel Rooms Available by Hotel Classification



Source: Macao Government Tourism Office

Top 10 Asia Pacific & Middle East Rankings by No. of Meetings, 2016

Rank	City	No. of Meetings
17	Macao	37
1	Singapore	151
2	Seoul	137
3	Bangkok	121
4	Beijing	113
5	Hong Kong	99
6	Tokyo	95
7	Taipei	83
8	Shanghai	79
9	Kuala Lumpur	68
10	Sydney	61

Source: ICCA Statistics Report, 2016

COMPREHENSIVE ANALYSIS

7. Effective Utilisation of Land Resources

The proper management of land can help in the sustainable development of the tourism industry and ensure sufficient area is maintained for Macao's residents:

Land is a crucial resource for the tourism industry as it supports the construction of tourism facilities, transportation and infrastructure. Macao has a relatively small land area but welcomes a large volume of visitors, therefore the proper management of land use is vital.

Current Situation, Opportunities and Challenges

- Compared with other international tourist destinations, Macao has limited land resources, with a total footprint of just 30.5 sq.km. Over 30 million visitors per annum have a significant impact on the overall urban environment of the city.
- The Macao peninsula is surrounded by ample water resources. However, most of the waterfront spaces in Macao is currently underutilised. Proper development of these areas can create more leisure spots for both residents and visitors.
- Redevelopment of the old town area is an effective way to optimise the use of limited land resources.
- Land reclamation has been an important step forward for Macao in the recent years, allowing the city to expand its land resources. The total reclamation area is planned of 3.5 sq.km with around 12% designed for multipurpose use of tourism, culture and leisure by residents and visitors.
- With limited land resources, Macao needs to balance the land use to allow all the industries and parties to benefit from the development and be enjoyed by both local communities and visitors.



COMPREHENSIVE ANALYSIS

8. Managing Overcrowded Tourism Areas

The proper management of crowded tourism areas can lead to a more positive visitor experience and contribute to long term sustainability:

Popular tourism sites often face very high volume of visitors and vehicular traffic, which could have negative bearing on the site's physical wellbeing. Overcrowding can also impact the site environment, visitor experience, welfare of residents living in the neighborhood, and security and safety. Proper site management to monitor and control crowds is an important measure.

Current Situation, Opportunities and Challenges

- Overcrowding at tourism sites has been identified as one of the key issues that Macao is facing. Visitors in Macao usually congregate in a few popular spots which have led to overcrowding at certain 'must-see' areas.
- The Ruins of St. Paul's, Senado Square, and the border points experience the highest forms of overcrowding. Real time crowd control measures are occasionally required during periods of elevated visitation.
- The district of A-Ma Temple and Taipa Downtown are areas which have seen a growing trend in overcrowding, following the continual rise in visitor arrivals to Macao.
- Overcrowding is most severe during high travel seasons, such as weekends, holidays, festivals and events.
- Deploying high-technology means can facilitate to effectively monitor and respond to crowd control measures. In the future, Macao should explore the appropriate means and tools to enhance site management practices.



COMPREHENSIVE ANALYSIS

9. Reducing the Environmental Impact of Tourism

The tourism industry can have a profound impact on the environment:

Tourism is a consumptive industry. The daily operation of transport vehicles, accommodation, tourism facilities and services require a vast amount of electricity and water. These industries also generate significant amounts of environmental emissions and waste. As visitors are becoming more aware of their environmental footprint and the green image of a destination, applying environmental practices is vital for a destination to stay competitive and maintain sustainable long-term growth.

Current Situation, Opportunities and Challenges

- Macao has various schemes addressing the environmental impacts caused by the industry, including the 'Green Hotel Award' which encourages local hotels to improve their environmental performance.
- In 2016, 27 hotels were awarded 'Green Hotel' status, accounting for around 25% of the total number of hotels in operation and 37.6% of the total number of hotel rooms.
- The 'Environmental Protection and Energy Conservation Fund' is promoted to further enhance the environmental standard of the industry by providing funding and support for green initiatives.
- The emission standards of tourism vehicles are continually reviewed and enhanced in order to reduce carbon emission and to ensure that the air quality in Macao.
- Macao has been undertaking construction and upgrading projects for solid waste and wastewater treatment facilities to enhance the city's carrying capacity on handling rising tourism waste.
- Upgrades of wastewater treatment plants, which is necessary to limit the discharge of liquid pollutants and to protect the natural environment.



COMPREHENSIVE ANALYSIS

10. Cooperating with industry stakeholders

Successful tourist destinations excel at cooperation, both at the local and regional levels:

Tourism is a highly complex activity which involves different parties to drive performance. As each party has its own responsibility and function, cooperation and collaboration between stakeholders and the destination as a whole is important. Clear communication can lead to efficiency and the delivery of high quality tourism products and service.

Current Situation, Opportunities and Challenges

- In Macao, there are several committees which support the development of the tourism industry. Some of these committees are directly involved while some others have an indirect approach. Some of the key committees include the “Committee for Development of World Centre of Tourism and Leisure”, “Tourism Development Committee”, “Cultural Heritage Committee”, “Urban Planning Committee”, “Committee of Cultural Industries”, “Committee for the Development of Conventions and Exhibitions”, etc.
- The Tourism Development Committee acts as the bridge between the government bodies and the industry stakeholders. However, the Committee serves as an advisory role and has no authoritative power over the industry.
- The tourism development of Macao covers many sectors including culture, sports, urban planning, transport, technology, security and others. In the future, collaboration between departments should be enhanced, so as to deliver more efficient destination management.
- In terms of regional cooperation, Macao has been signing agreements and participating in various schemes with different cities in Mainland China, such as the Pan-Pearl River Delta, and Guangdong-Hong Kong-Macao, to promote mutually beneficial cooperation between these regional partners.
- National tourism policies provide Macao the opportunity to enhance its regional development. The Belt and Road initiative bridges the Asian and European countries and regions through infrastructure investment, which enables Macao to enjoy added connectivity and accessibility from other markets. Additionally, the “Guangdong-Hong Kong-Macao Greater Bay Area” development will also seek to enhance Macao’s collaborations with its nearby cities, in line with the goal to develop Macao as one of the multi-destination cities.
- At the international level, Macao’s participation in various international tourism organisations, including the World Tourism Organization, Pacific Asia Travel Association, APEC Tourism Working Group and World Tourism Cities Federation has enhanced Macao’s participation in international tourism affairs and the opportunity to cooperate and exchange with other world-class destinations as well as to continuously increase Macao’s presence in the international tourism arena.





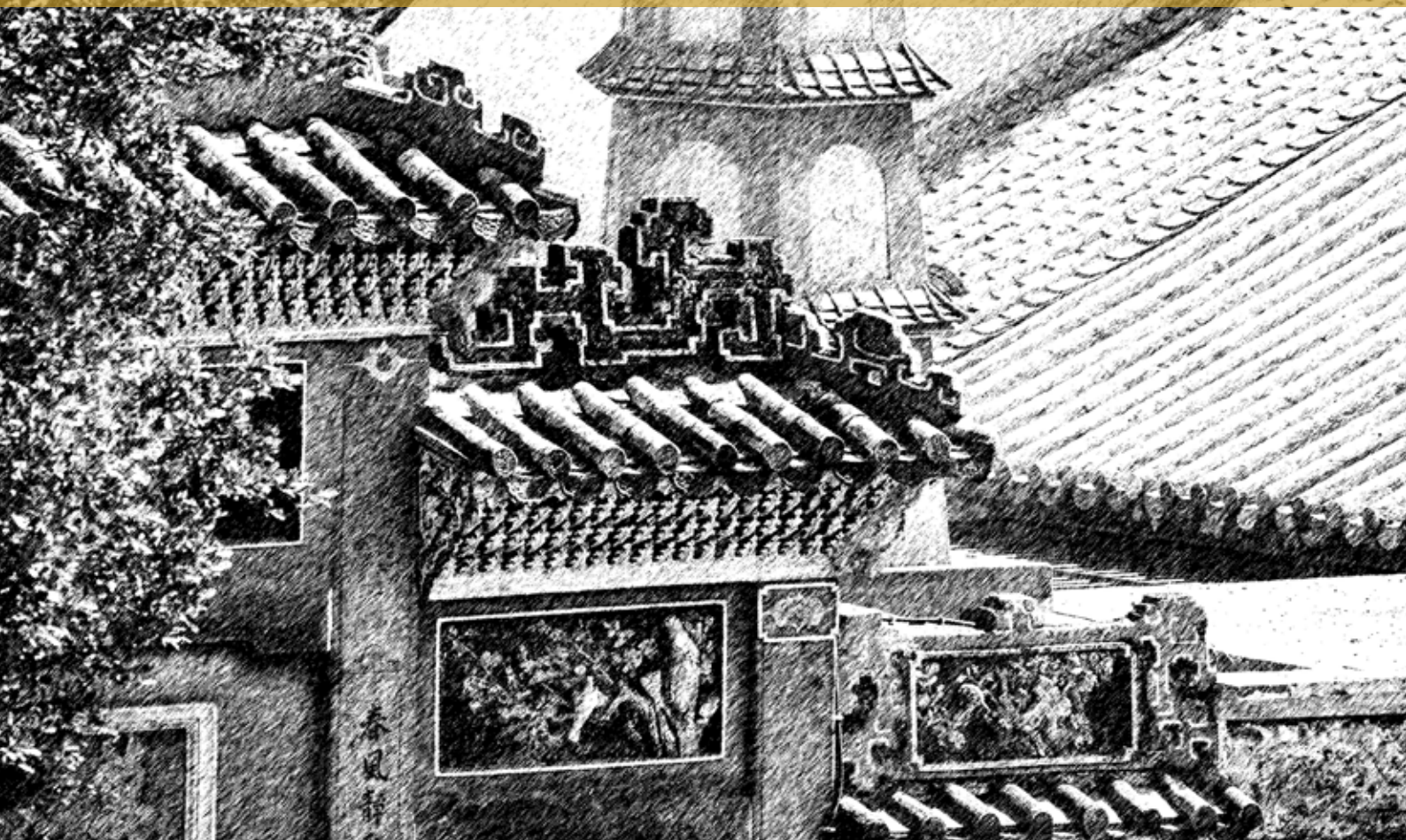
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5. KEY OBJECTIVES AND STRATEGIES



KEY OBJECTIVES AND STRATEGIES

Recognizing the key aspects in Macao's tourism industry, eight key objectives and relevant strategies have been identified to enable Macao to propel itself as a world-class tourist destination. These key objectives are aiming to leverage the industry's

potentials and opportunities, as well as to address the challenges found in each specific area, so as to achieve the vision of developing Macao into the World Centre of Tourism and Leisure.



KEY OBJECTIVES AND STRATEGIES

Objective 1: Diversify Tourism Products and Experiences

The goals of this objective are to increase the percentage and extend the length of stay of overnight stay visitors; to rebuild the image of Macao as a world-class tourist destination; to further foster sustainable tourism development in the future; and to improve the residents' quality of life.



Introduce New Tourism Elements

Introducing new tourism elements by utilising potential development areas and the defined maritime areas for marine tourism and a vibrant waterfront environment.

Develop Iconic Tourism Products

Introducing distinctive tourism facilities, events and festivals to showcase the unique attractiveness of Macao and make it stand out from other international tourist destinations.

Enrich Visitors' Experience

Enriching visitors' experience by diversifying tourism products through cultural programmes and classes, educational tours, and immersive information systems.

Expand Tourism Related Offerings

Attracting a worldwide audience by offering varied tourism accommodation and retail options to accommodate different visitor demands.

KEY OBJECTIVES AND STRATEGIES

Objective 2: Improve Service Quality and Skills

Industry professionals and related tourism industry personnel are critically important for the successful development of Macao's tourism industry. Macao needs to continuously improve its service quality and efficiency, and enhance visitor convenience to make itself a world-class tourist destination.



Enhance Skills Development in Tourism Industry

Maintaining an on-going skills development for different personnel in the tourism industry to enhance the overall service quality; encouraging international exposure and self improvement.

Enhance Service Standards of Tourism Industry

Continuously promoting quality tourism with the implementation and expansion of the current Quality Tourism Services Accreditation Scheme (QTSAS) to other tourism sectors.

Establish an Integrated Tourism Quality Assurance System

Integrating various aspects of standards and regulation of the tourism industry with the end goal of enhancing service quality and achieving visitors satisfaction.

KEY OBJECTIVES AND STRATEGIES

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

Rebranding Macao as a world-class multi-day destination, with specific target on high-value markets and the smart tourism development to expand Macao's visitor source markets and enhance visitor experiences.



Attract High-value Market Segments

Implementing a visitor-centric approach to attract high-value market segments across countries to visit Macao.

Enhance the Macao's Multi-day Destination Brand Image

Macao has the potential to become a multi-day destination with a wealth of good tourism resources and experiences. Effectively marketing on these resources can encourage greater exposure of Macao and extend visitors length of stay.

Support and Promote MICE Development

Strengthening the marketing strategies on the growing MICE market is beneficial to Macao's overall tourism development and to maintain its competitiveness.

Conduct Online Tourism Marketing

Employing digital marketing approaches can respond to the technology and development trend, and differentiate Macao by fully utilising its unique brand stories and tourism resources.

KEY OBJECTIVES AND STRATEGIES

Objective 4: Optimise Urban Development Model

Tourism resources, convenient travels, environmental and outer connectivity are the important factors to tourism development. Redeveloping potential areas and exploiting the new reclamation areas can provide additional tourism resources to the city. Sound road networks, environmental condition and city accessibility can deliver quality living, tourism, civic and cultural spaces for residents and visitors.



Introduce New Tourism Areas

Implementing urban redevelopment projects can provide quality living, tourism, civic and cultural spaces for residents and visitors. The development of selected spots in the new reclamation areas can be utilised for tourism, culture, leisure and open space.

Upgrade of Ground Transport

The upgrade of local transportation and enhancement of walking experience, signage and public realm can provide a pleasant ambient to the residents and visitors.

Monitor and Manage the Quality of Environment

The monitoring and management of better environmental standards from various aspects would improve the living environment of the city.

Improve Access to Macao

Better connection between Macao and other cities in the region will strengthen the city's accessibility. The direct connectivity to Hong Kong International Airport will escalate Macao's connection to more tourist source markets.

KEY OBJECTIVES AND STRATEGIES

Objective 5: Manage Macao's Tourism Carrying Capacity

Proper management on tourism carrying capacity can enhance the capability of the destination in accommodating visitors, as well as minimize negative impacts on visitors, local residents and natural environment.



Monitor Macao's Tourism Carrying Capacity

Developing regular monitoring mechanism can measure and keep track of the tourism carrying capacity and help evaluate the efficiency of implementation.

Redistribute Peak Travel Demand

Redistributing tourism demand from peak travel periods is beneficial to the use of resources and can provide pleasant visiting experience.

Relieve the Problem of Tourist Attractions Crowdedness

Identify areas of key concern and prepare site management plans can address visitor crowdedness and safety concerns.

Address the Issues of Transportation Carrying Capacity

High-priority policies are needed to address transportation issues and ensure accessibility and good quality services to both residents and visitors.

Enhance and Expand Human Resources

Sufficient and skilled labour force is a vital resource for tourism development. Proper management in human resources supports the service demand of the industry.

Reduce Environmental Impacts Caused by Tourism

Encouraging and expanding the environmental measures in the industry can spur sustainable development of the tourism industry and the destination, and minimize possible environmental impacts.

KEY OBJECTIVES AND STRATEGIES

Objective 6: Utilise Innovative Technology

Deploying appropriate innovative technologies in tourism industry can enhance visitor experience, extend visitor length of stay, optimise the overall operation of tourism industry, and ensure real time monitoring, so as to enhance reasonable utilisation of tourism resource.



Use Technology to Drive Destination Marketing Approach

Redesigning Macao's marketing website with more dynamic features and easy management interface can allow multi-level marketing and strengthen the site application.

Consolidate Tourism Information to Expand Tourism Capability

Setting up an information interchange platform and tourism database can assist tourism development and facilitate application of innovative technology.

Facilitate Smart Technology Applications

Macao has started pursuing as a smart tourism destination. Expanding coverage of technological application is essential to respond to the fast-changing trend and provide seamless experience and better monitoring and response.

Use Technology to Increase Safety and Security Level of the City

Macao's large visitor volumes have high stakes and compels the need for upgrading security systems in tourism areas for better monitoring and quicker response. Having such smart technologies secures Macao's reputation as a safe destination.

KEY OBJECTIVES AND STRATEGIES

Objective 7: Enhance Tourism Industry Cooperation

By optimizing the existing administrative procedures, refining tourism legislation and enhancing collaboration among public and private sectors, to ensure the effectiveness of tourism management and operations.



Formulate Viable and Up-to-date Tourism Law and Regulations

Legislation should be reviewed and updated as appropriate to respond to the need of tourism development.

Review the Licensing Mechanism

Exploring the feasibility of issuing provisional licenses and the means of simplifying application procedures to increase administrative efficiency in the tourism industry.

Effective Cross-department Coordination and Management

Improving communication among all departments to strengthen the collaborative efforts within different tourism aspects.

Strengthen Collaboration between Public and Private Sectors

In order to promote tourism industry development, to continually strengthen the communication and coordination between public and private sectors is essential to achieve the mutual development goal.

KEY OBJECTIVES AND STRATEGIES

Objective 8: Enhance Macao's Position as a Core Tourism City in the Regional and International Tourism Community

The objective is to foster regional partnership and international participation in order to improve Macao's tourism performance and enhance its position as a world-known destination.



Achieve Active Government Cooperation

Strengthening and extending mutually beneficial ties between Macao and its regional and international partners.

Provide Better Transport Connectivity and More Convenience for Visitors

Improving border connectivity and visa facilitations to respond to the rising number of visitors.

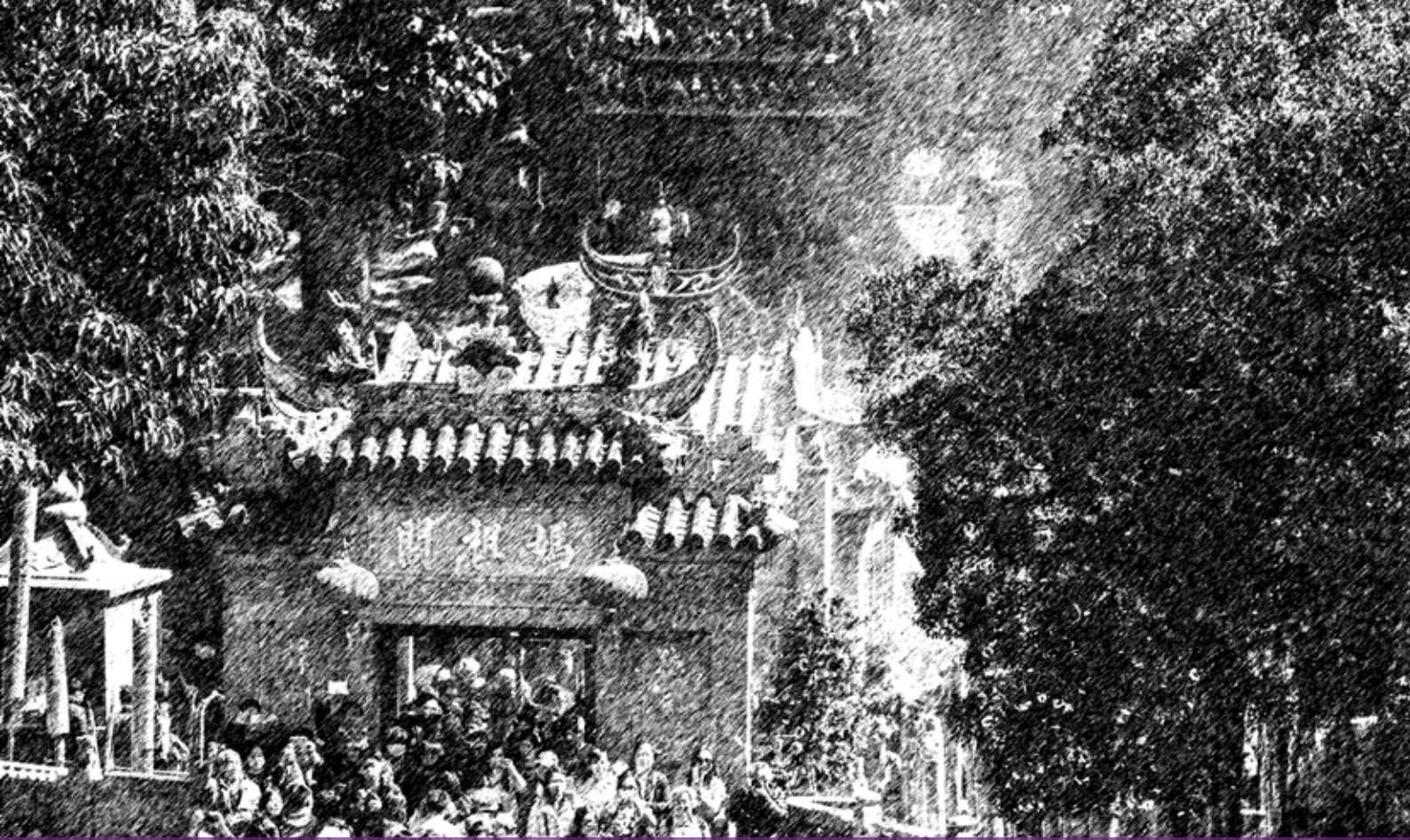
Provide Cross-boundary Tourism Products and Events

Cooperating with regional partners to develop on-going cross-boundary tourism products and events.

Enhance and Strengthen Macao's Image as a Tourist Destination

Continuing the participation in the major international tourism organisations and the pursuit of international awards in order to elevate Macao's tourism position.





6. ACTION PLANS



ACTION PLANS

In order to meet the Master Plan's objectives and reflect the key issues identified in Macao's tourism industry, appropriate action plans need to be developed and implemented in a reasonable scale and timeframes. Action plans in eight specific areas are formulated based on world-class examples and localized with Macao's situation and feedbacks gained from the general public and stakeholders. They are further integrated with policies, measures and task plans of respective government agencies to ensure the feasibility of the Master Plan. The action plans are structured as follow:

Tourism Resources and Products System

Tourism resources and products are one important factor to tourism development. Diversified experiences allow destination to maintain its appeals and competitiveness.

Tourism Quality and Service System

Tourism is a service oriented industry. Service quality affects social perception and experience of visitors, and is a key determinant to a successful destination.

Tourism Branding and Marketing Strategies*

Marketing and promotion is a key way to present the destination to prospective visitors, with successful branding to help it to stand out among competitors.

Tourism Industry and City Development

Development of tourism and the city as a whole has an inseparable relationship. A healthy tourism development should be able to bring about positive impacts that will benefit the whole society and community.

Tourism Carrying Capacity

Tourism carrying capacity indicates the ability of a destination to accommodate visitors and provide pleasant visiting experiences without harming the environment, and the local quality of life.

Tourism and the Application of Innovative Technology

As the world is becoming technologically advanced, the use of innovative technologies in tourism industry is a revolutionary step to respond to the trend, enhance efficiency, and cater to the more technology aware visitors.

Tourism Industry Cooperation System

Tourism development involves various aspects, establishing good coordination and cooperation between different organisations and parties is a way leading to effective management and successful implementation.

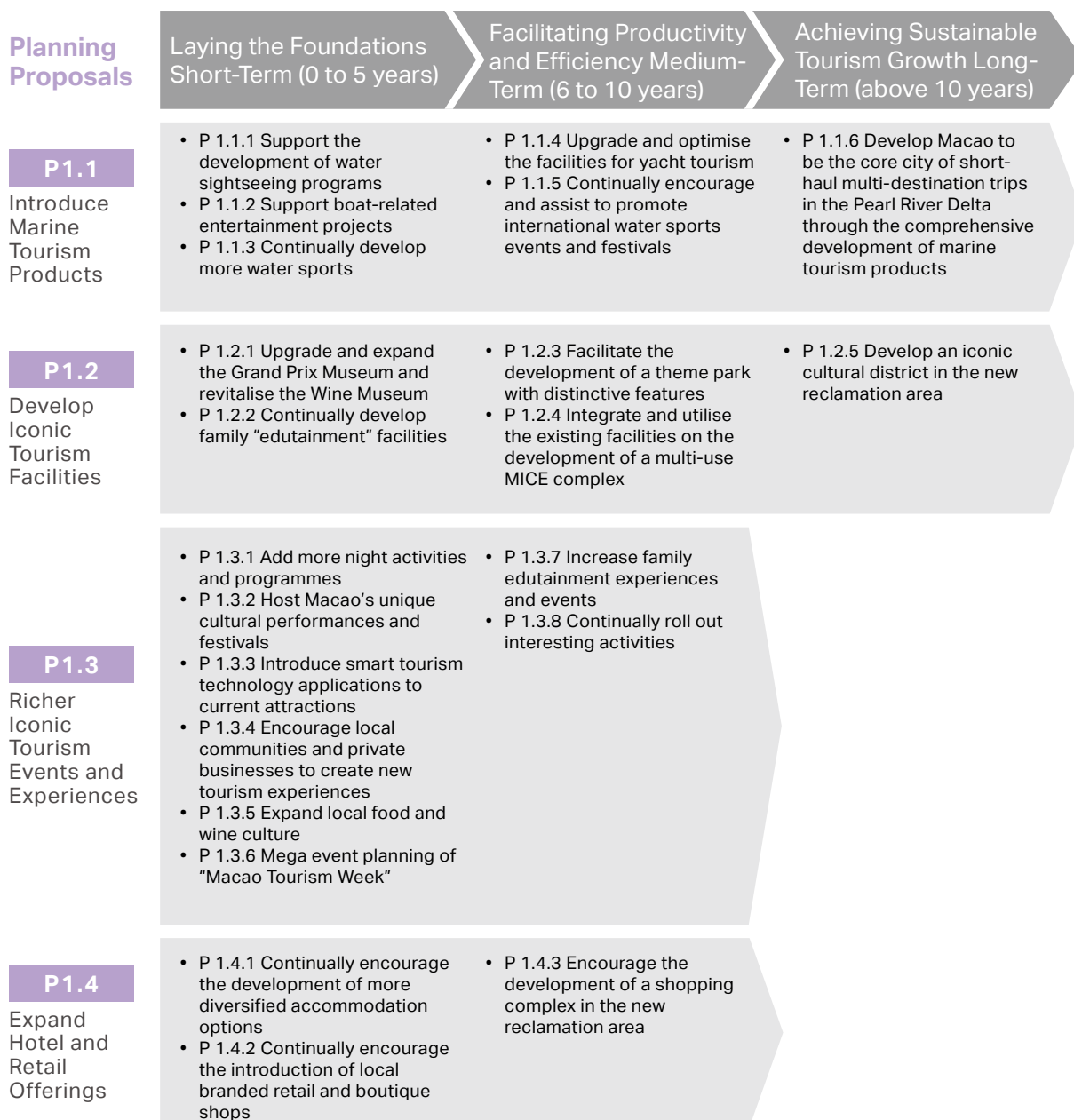
International and Regional Tourism Cooperation and Development

Effective regional and international cooperation is beneficial to approaching new opportunities in tourism industry, and escalating the destination's position and reputation in the world.

*For strategies related to Branding and Marketing, it is supported by 4 implementation strategies.

ACTION PLANS

1. Tourism Resources and Products System



ACTION PLANS

2. Tourism Quality and Service System

Planning Proposals

P2.1

Skills and Workforce Development for Career Path Planning

Laying the Foundations
Short-Term (0 to 5 years)

- P 2.1.1 Promote Macao skills and workforce development for career path planning
- P 2.1.2 Continued forecast of industry skills and workforce development – tourism industry
- P 2.1.3 Formulate international skills and training development programme – tourism industry
- P 2.1.4 Study of the demand and policy for non-resident workers for Macao's tourism industry

Facilitating Productivity and Efficiency
Medium-Term (6 to 10 years)

- P 2.1.2 Continued forecast of industry skills and workforce development – other industries (on-going action)
- P 2.1.3 International skills and training development programme (on-going action)

P2.2

Implement a Learning Management System for Integrated Tourism Quality Assurance

- P 2.2.1 Set up and build the content and skills development curriculum in the Learning Management System (build specific training programme for specific sectors/ skills)

P2.3

Upgrade Tourism Services to International Standard

- P 2.3.1 Feasibility study of the extension of the Quality Tourism Services Accreditation Scheme (QTSAS) to other tourism sectors

- P 2.3.2 Implementation of the Tourism Volunteering Programme

ACTION PLANS

3. Tourism Branding and Marketing Strategies

Implementation Strategies

Laying the Foundations
Short-Term (0 to 5 years)

Facilitating Productivity and
Efficiency
Medium-Term (6 to 10 years)

P3.1

Enhance the Marketing for High-value Target Segments

- P 3.1.1 Market research and analytics on the target markets
- P 3.1.2 Enhanced targeted marketing campaigns for high-value market segments

P3.2

Rebrand Macao as a Multi-day Destination

- P 3.2.1 Strengthen collaboration with source markets' industry partners
- P 3.2.2 Enhance marketing promotions to share multi-day packages
- P 3.2.3 Change the brand image of Macao into a multi-day destination

P3.3

Strengthen the MICE Organisation and Marketing

- P 3.3.1 Redesign the MICE portal for increased functionality
- P 3.3.2 Develop MICE incentive programmes and packages
- P 3.3.3 Add the "Plan Your Event" function into the existing IPIM MICE mobile app
- P 3.3.4 Aggressive marketing to industries
- P 3.3.5 Build a Customer Relationship Management System (CRM)

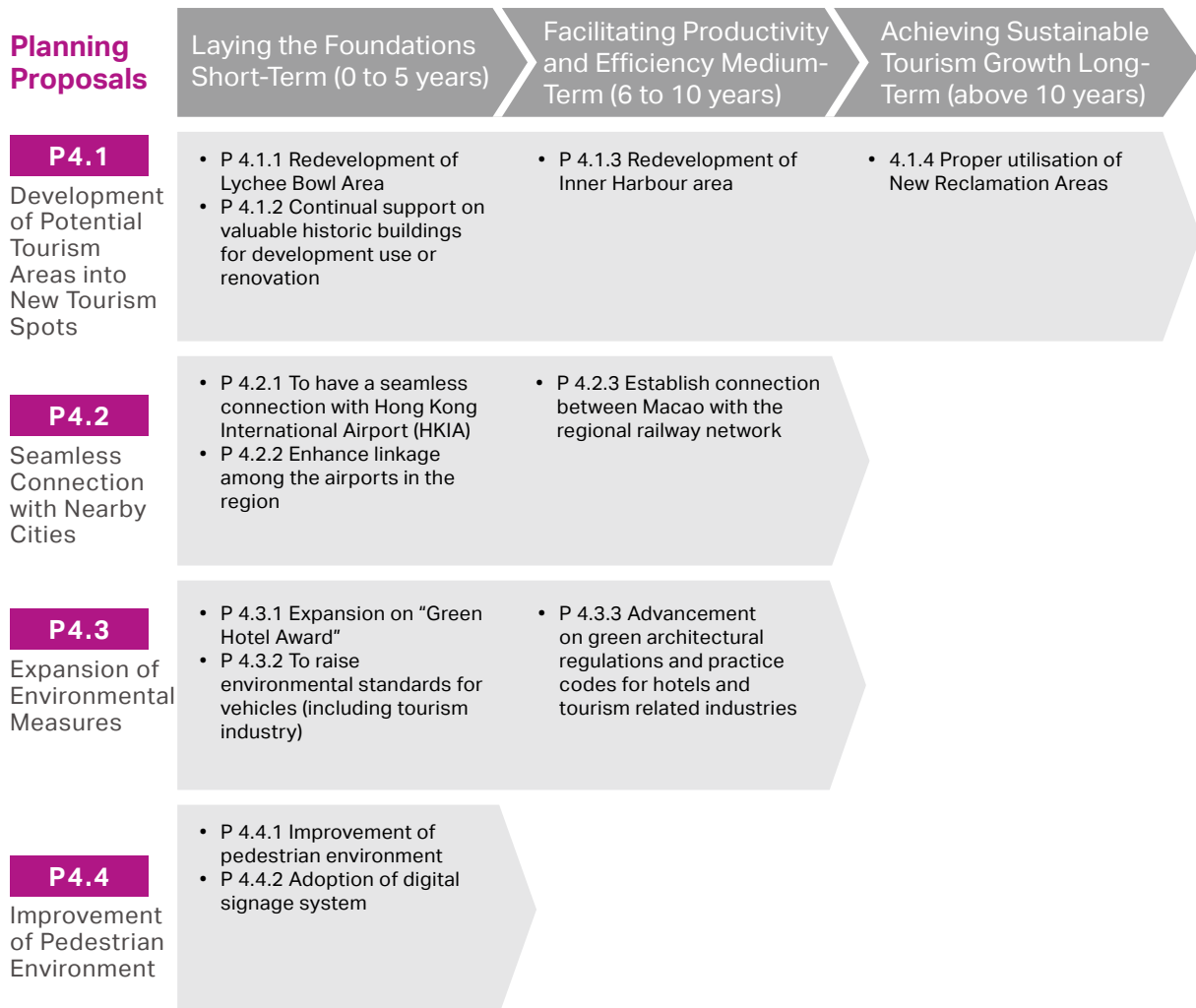
P3.4

Upgrade Online Marketing Systems and Content

- P 3.4.1 Redesign the marketing website
- P 3.4.2 Develop several advocacy programmes to support branding and mobile marketing of Macao

ACTION PLANS

4. Tourism Industry and City Development



ACTION PLANS

5. Tourism Carrying Capacity

Planning Proposals

Laying the Foundations
Short-Term (0 to 5 years)

Facilitating Productivity and
Efficiency
Medium-Term (6 to 10 years)

P5.1

Design KPI
for Monitoring
Macao's Tourism
Carrying
Capacity

- P 5.1.1 Expand the annual Tourism Carrying Capacity (TCC) reports to include more KPIs on monitoring the carrying capacity

P5.2

Site
Management of
Crowded Tourist
Attraction Areas

- P 5.2.1 Augment the "Protection and Management Plan of the Historic Centre of Macao" with management measures on the tourist attractions carrying capacity
- P 5.2.2 Implement site management plan and develop corresponding strategies for the crowded tourist attractions

P5.3

Policies for
Transportation
Improvements

- P 5.3.1 Prepare an assessment on visitor traffic and transportation capacity at tourism hotspots
- P 5.3.2 Implement taxi service improvement policy
- P 5.3.3 Effective management on tourism use vehicles
- P 5.3.4 Increase the usage rate of Cotai Checkpoint
- P 5.3.5 Support the project of Light Rapid Transit System (LRT) and the extension to all border crossing points

P5.4

Encourage
Tourism Waste
Reduction and
Recycling

- P 5.4.1 Encourage proactive solid waste recycling in hotels
- P 5.4.2 Expand solid waste recycling system to high tourism traffic areas
- P 5.4.3 Conduct a feasibility study on constructing a wastewater recycling plant
- P 5.4.4 Upgrade and optimise the treatment process of wastewater treatment plants

ACTION PLANS

6. Tourism and the Application of Innovative Technology

Planning Proposals

P6.1

Set-up a Tourism Information Interchange Platform to Facilitate Content and Industry Management with Innovative Technology

Laying the Foundations Short-Term (0 to 5 years)

- P 6.1.1 Set up a tourism information interchange platform
- P 6.1.2 Provide training and promotion to facilitate the use of the tourism information interchange platform

Facilitating Productivity and Efficiency Medium-Term (6 to 10 years)

- P 6.1.3 Integrate with big data of Macao smart city

P6.2

In-market Smart Tourism Technology Applications to Improve Travel Experience

- P 6.2.1 Conduct applied research on innovative technology in tourism industry
- P 6.2.2 Facilitate deployment of wider Wi-Fi use and coverage

P6.3

Expanded Tourism Security Systems through Smart Technologies

- P 6.3.1 Conduct study of a smart tourism control centre
- P 6.3.2 Employ technological means to provide real time information on crowded tourism areas
- P 6.3.3 Expand current city surveillance ("Sky Eye") to cover tourism areas

ACTION PLANS

7. Tourism Industry Cooperation System

Planning Proposals

Laying the Foundations Short-Term (0 to 5 years)

P7.1

Review Tourism-related Laws and Legislation

- P 7.1.1 Deepen the implementation of the "key points in contract between Mainland China's tour operators organising tours for mainland residents to Macao and Macao's ground receiving agents"
- P 7.1.2 Revision of Decree-Law 48/98/M to develop a new system for travel agencies and tour guides

P7.2

Refine the Licensing System

- P 7.2.1 Explore to set up a provisional licensing system
- P 7.2.2 Optimise license application procedures

P7.3

Optimise Cross-departmental Collaboration

- P 7.3.1 Expand the existing responsibilities of the Tourism Development Committee (CDT)
- P 7.3.2 Participate in developing the open data sharing system

P7.4

Enhance Public-Private Cooperation

- P 7.4.1 Optimise the role of the Tourism Development Committee (CDT) as a bridge between government and industry
- P 7.4.2 Define the corporate social responsibilities for integrated resorts and gaming concessionaires

ACTION PLANS

8. International and Regional Tourism Cooperation and Development

Planning Proposals

Laying the Foundations
Short-Term (0 to 5 years)

Facilitating Productivity and
Efficiency
Medium-Term (6 to 10 years)

P8.1

Strengthen
Regional
Government
Cooperation in
Key Issues

- P 8.1.1 Continue to promote the “Cooperative Check, One Clearance” customs clearance model
- P 8.1.2 Expand the “Free Yacht Scheme” to cover more cities

- P 8.1.3 Promote more convenient border crossing and visa policies between Macao and Hengqin

P8.2

Jointly Develop
Strategic Tourism
Products with
Nearby Cities and
Other International
Cities

- P 8.2.1 Further explore the cross boundary tourism products and promote the joint tourism marketing
- P 8.2.2 Deepen exchange and cooperation with Portuguese-speaking countries

- P 8.2.3 Organise bi-city events in the fields of culture, sports and tourism

P8.3

Enhance
International
Recognition
and Influence of
Macao

- P 8.3.1 Improve Macao’s tourism ratings and attain more tourism awards
- P 8.3.2 Proactively enhance Macao’s position and reputation in the international tourism organisations

ACTION PLANS

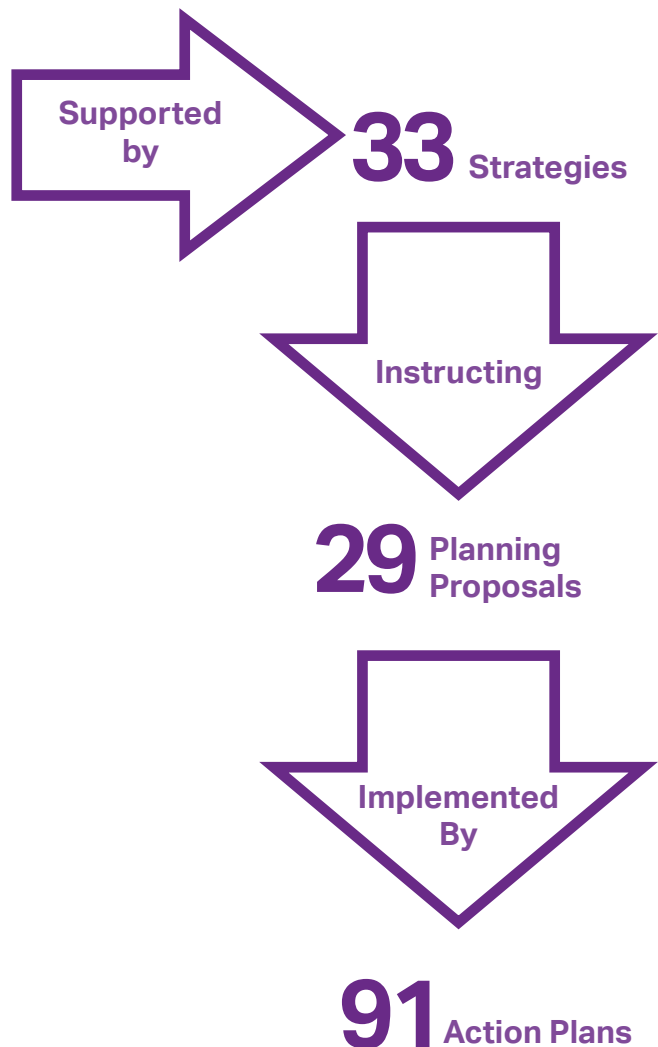
In order to achieve the vision of developing Macao as the "World Centre of Tourism and Leisure", the Master Plan covers various key topics of the tourism industry and has developed 8 key objectives which

are supported by specific strategies and action plans for the successful implementation.

1 Overall Goal: Developing Macao as the "World Centre of Tourism and Leisure"

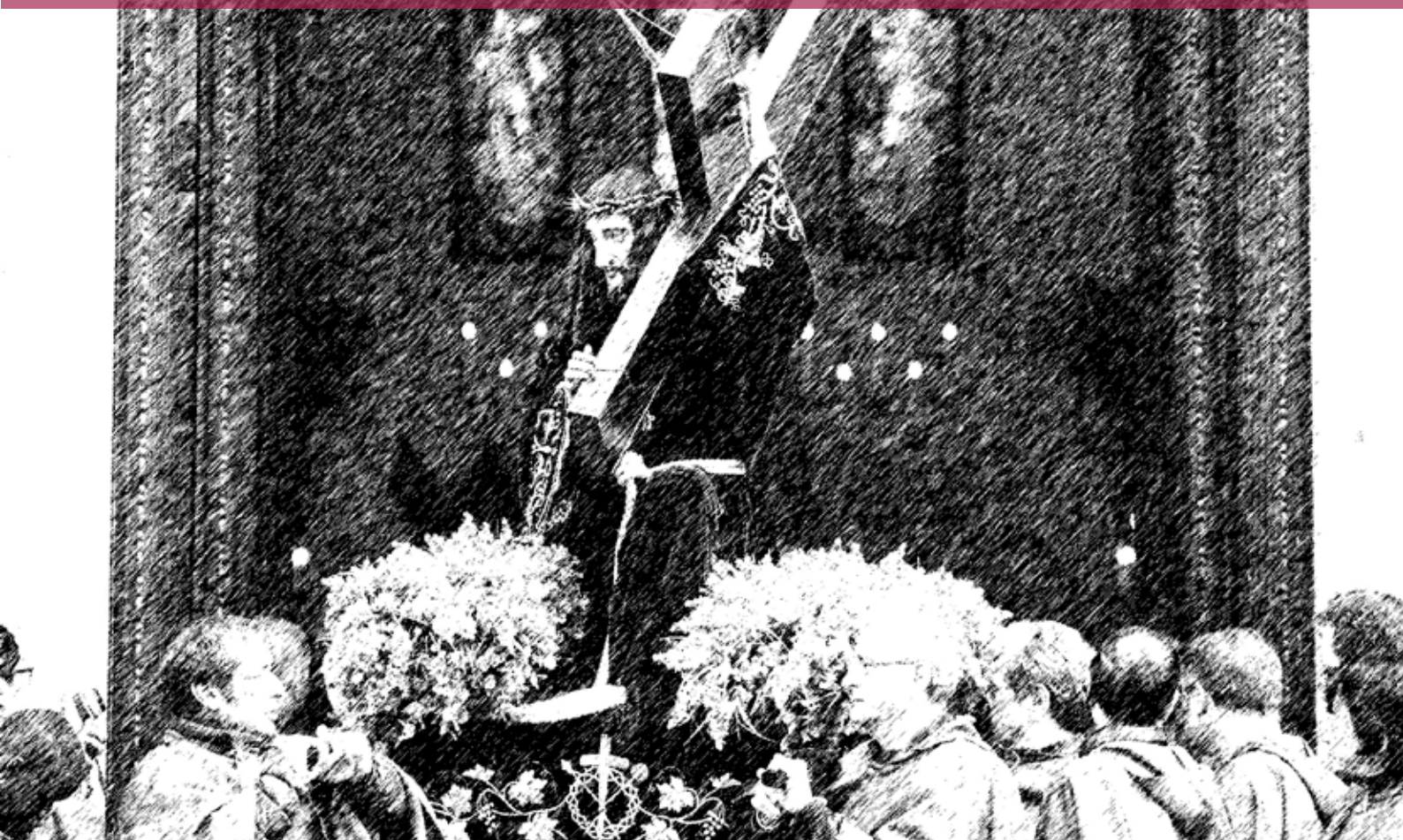
8 Key Objectives

1. Diversify tourism products and experiences
2. Improve service quality and skills
3. Rebrand Macao as a multi-day destination and expand high-value markets
4. Optimise urban development model
5. Manage Macao's tourism carrying capacity
6. Utilise innovative technology
7. Enhance tourism industry cooperation
8. Enhance Macao's position as a core tourism city in the regional and international tourism community





7. SCENARIO FORECASTS OF THE MASTER PLAN



SCENARIO FORECASTS OF THE MASTER PLAN

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

Tourism is a dynamic and susceptible industry, it is vulnerable to unpredictable external factors. The Macao Tourism Industry Development Master Plan should allow flexibility and consider priority in terms of the strategy implementation in order to respond to the actual situation. In the event that tourism is developing slower than projection, Macao should prioritise on the strategies and action items to stimulate tourism growth, which include more

aggressive marketing campaigns, exploration of new potential markets, expedite product diversification and development, optimising tourism facilities and infrastructures, and the expansion of regional and international cooperation. These strategies focus on elevating the recognition of Macao as a tourist destination as well as attracting more visitor arrivals.

On contrary, if Macao is welcoming far more visitors than expected, the tourism development strategies should emphasise on managing and enhancing Macao's tourism carrying capacity on tourism sites, border points, transportation and environmental resources, solving the tourism-related labour shortage problem, and redistributing peak arrival demand so as to increase Macao's capacity in accommodating a high volume of visitors and minimise any negative impacts.

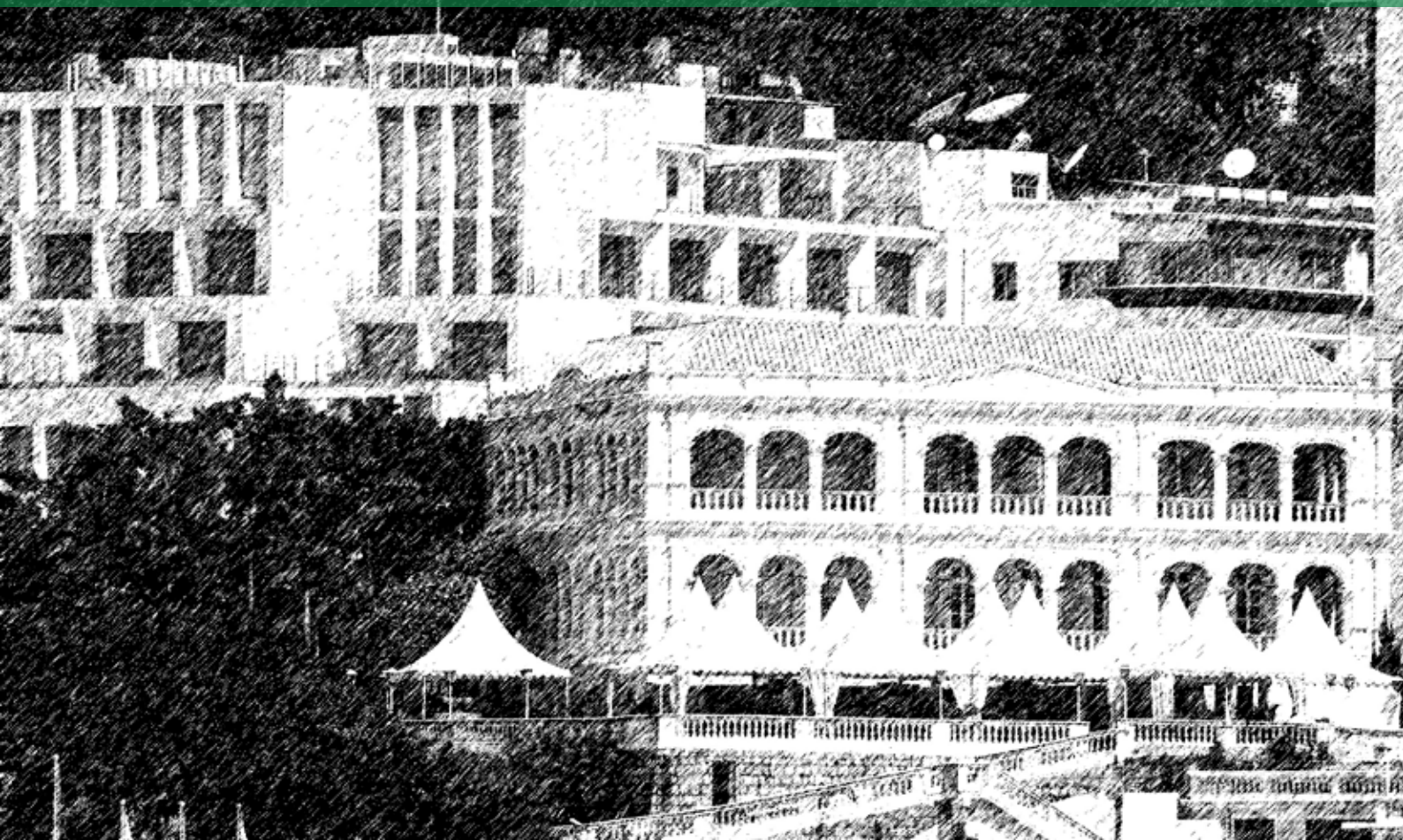
	2016	Low Visitor Growth Scenario Year 2025 Estimate	Modest Visitor Growth Scenario Year 2025 Estimate
Total Visitor Arrivals	30.95 million	33 to 35 million (1%-2% visitor growth per annum)	38 to 40 million (3%-5% visitor growth per annum)
Visitors' Non-gaming Spending	USD 6.6 billion	USD 12 to 13 billion	USD 13 to 14 billion
Average Length of Stay of Overnight Stay Visitors	2.1 Days	2.3 Days	2.3Days
Percentage of Overnight Stay	50.7%	56%	53%
Number of Hotel Rooms	37,634	48,600	51,900
Tourism Related Employment*	242,000	258,000	295,000
Hotel Average Occupancy Rate	83%	82%	84%
*Tourism related employment figures include non-resident workers who do not live in Macao			

Note: The projections of the Master Plan are based on the 2015 figures as baseline.





8. EVALUATION MECHANISM OF THE MASTER PLAN



EVALUATION MECHANISM OF THE MASTER PLAN

As time progresses, the development direction of tourism in Macao will change according to the objective environment, overall policy of the Macao SAR Government, economic policies and trends in other countries, competitiveness of nearby tourist

destinations, exchange rates and other factors. Thus, the proposed key objectives, strategies and action plans will need to be reviewed regularly and adjusted when appropriate.

Annual Review:

An annual review should be conducted with the purpose to evaluate the implementation and execution progress of the Macao Tourism Industry Development Master Plan. The regular review should include the following:

- Review the implementation and project progress of all the planning proposals and action plans as suggested in the Macao Tourism Industry Development Master Plan;
- Identify the key obstacles of action plans and consider possible solutions.

Mid-Term Review:

In addition to the annual review, a mid-term review should be conducted at a suitable time to ensure the development focus and strategies presented are reflective to the latest situation and trends of the industry. The mid-term review should include the following:

- Monitor the situation of Macao's tourism development, according to the National Tourism Policy and Plan;
- Explore and analyse the global trend and Macao's tourism situation to identify any new opportunities, challenges and constraints for further development;
- Revisit the objectives, strategies and action plans based on the evaluation result and conduct mid-term review when necessary;
- In conjunction with the results of the annual review, evaluate and adjust the action plans when necessary.



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9. FUTURE PERSPECTIVES



FUTURE PERSPECTIVES

Achieving to Become the “World Center of Tourism and Leisure”: The Macao SAR has an ambitious overall goal to become the “World Center of Tourism and Leisure”. The Macao Tourism Industry Development Master Plan is the programme of actions for achieving this goal. The tourism industry’s influence is very broad, touching many different areas including its people, enterprises and the government. The Master Plan provides a framework and action items that bring together the best efforts of the government and the society to realise this goal.

An Outlook for the Tourism Industry: Global tourism continues to rapidly expand, especially in the Asia region. The fundamental desire for visitors to see and experience different cultures and places is being fulfilled by rapid changes in information technology, and massive investments in tourism infrastructure. Macao with its unique and cherished culture and heritage blended with world-class integrated resorts has laid a solid foundation for long term development. The government, enterprises and the residents of Macao should be prudent and optimistic about the future of tourism and seek for new approaches to create win-win solutions.

Improved Tourism Industry Cooperation: Tourism is a broad and complex industry. The Master Plan stresses the importance of the improvement of cooperation between the government, organisations and industry partners. Cooperation channels include tourism research, data sharing and the enhancement of the role of the Tourism Development Committee, etc. The Master Plan calls for numerous follow-up studies on many topics including tourism products, marketing promotion, new development areas, security systems and human resources. These studies will also involve collaboration between public and private sectors in more detailed analysis, consultation and implementation.

Leading as the Holistic Tourism Destination: “Holistic Tourism Destination” is a model to promote tourism as a driver to coordinate economic and social development within the region. The “Five-Year Development Plan of the Macao Special Administrative Region” (2016-2020) has identified the concept of the gradual formation of “Business Environment for Tourism and Leisure Industries” which emphasises the role of tourism to stimulate economic growth and the development of other related industries. The two models above carry the same development concept. The “Macao Tourism Industry Development Master Plan” is formulated with the concept of “Business Environment for Tourism and Leisure Industries” as the guiding principle, and suggests a host of measures to enhance the complementation and co-development of tourism and other industries, including hotel, dining, entertainment, retail, MICE, trading, etc. In the future, with the implementation of the “Macao Tourism Industry Development Master Plan”, the Macao tourism industry will be able to carry out the development of “Holistic Tourism Destination”, to enrich its tourism offerings and to optimise and enhance other industries.

To be a Core Tourism City of the Belt and Road Initiative and the Guangdong-Hong Kong-Macao Greater Bay Area : As one of the earliest developed coastal city in Southern China, Macao has been playing an important role in the Sea Silk Road. Over the years, Macao has been developed to be a successful coastal tourism destination and can be an important role model of leisure tourism city. In the future, with the government’s active participation in the “Belt and Road Initiative”, Macao can enjoy the new opportunities for the tourism development by leveraging its extensive experience engaging in the international tourism organisations, unique cultures, historical legacy and abundant tourism resources.

Under the development of Guangdong-Hong Kong-Macao Greater Bay Area and the construction of a world-class urban cluster, the “Macao Tourism Industry Development Master Plan” suggests various strategies and action plans to strengthen regional cooperation and develop Macao as the core city in the region. Through the optimization of resources, coordination and staggered development with other regional cities, Macao can further expand the cooperation with Mainland China and Hong Kong and promote regional integration and exchanges, which create favourable conditions in building Macao as a “World Center of Tourism and Leisure”.

FUTURE PERSPECTIVES

Resilience to Overcome Challenges: The Macao Tourism Industry Development Master Plan provides a framework of objectives, strategies and action plans to be realised over short, medium and long term. There is built-in resilience to allow the flexibility to adapt to changes yet maintaining the overall objectives. As travel preferences change, dynamic marketing and social media allows for fast identification and responses to opportunities and challenges. New security technologies and a Smart Tourism Control Centre will reduce unanticipated events and threats. The Master Plan improves the resilience of Macao to cope with sudden incidents and overcome challenges.

Implementing the Master Plan: The Master Plan identifies KPI targets and many action plans to be carried out by a range of government departments and organisations. Annual reviews on KPI targets and action progress will be carried out as well as a medium-term review of the whole Master Plan and its development direction at a suitable time. The Master Plan calls for improvements in collaboration between the government departments and the private sector in order to achieve the overall goal of becoming the World Center of Tourism and Leisure. The implementation of the Master Plan will require dedicated and persistent leadership to build consensus and where necessary overcome challenges. While the Master Plan gives a clear roadmap with objectives and strategies, it takes leadership to drive tourism industry for sustainable development and growth.

A Bright Future for Future Generations: Sustainable tourism development, preserving and celebrating the uniqueness of Macao, upgrading skills, and diversifying opportunities all support the long-term success of Macao. Challenges and obstacles will certainly appear. However, as the Macao Tourism Industry Development Master Plan evolves and matures, the development of tourism industry will be a guiding light for the industry itself and the future success of Macao and its people.









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