Macao Tourism Industry Development Master Plan
Comprehensive Report

DIREÇÃO DOS SERVIÇOS DE TURISMO
September 2017
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CHAPTER 1
INTRODUCTION
1. INTRODUCTION

1.1 PROJECT BACKGROUND AND IMPORTANCE

Planning Background

1 Task Defined

A Tourism Industry Master Plan is an essential strategic tool to help a destination build and manage its tourism economy. Macao’s need for a master plan has been identified to ensure that the destination’s development and growth are in line with the long-term vision for Macao as a “World Centre of Tourism and Leisure”.

2 Background

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

With continuous growth of visitors from different parts of the world, the tourism industry of Macao has significant development potential. However, the city faces constraints in limited land, human resources and other areas. To support the Macao SAR Government’s vision to become a “World Centre of Tourism and Leisure”, Macao Government Tourism Office (hereinafter as “MGTO”) initiated the “Macao Tourism Industry Development Master Plan” project in 2015. The objective was to carry out a comprehensive study and to provide a guideline for the development of Macao’s tourism industry for the next 15 years, from the point of initiation, through to 2030.

This Master Plan covers many aspects in tourism development, including studies on tourism products, source markets, service quality and regional cooperation etc.

3 Positioning Macao as a World Centre of Tourism and Leisure

In 2011, the “12th Five-Year Plan for Economic and Social Development of the People’s Republic of China” (“the 12th Five-Year Plan”) has announced the Central Government’s support for positioning Macao in becoming a “World Centre of Tourism and Leisure”. In 2016, the “13th Five-Year Plan for Economic and Social Development of the People’s Republic of China” (“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 is currently positioning itself as a “World Centre of Tourism and Leisure” to in line with the current trends and the SAR Government’s strategy of economic diversification. This study aims to understand the current tourism situation of Macao and propose different strategies, planning proposals and action plans to develop Macao into a “World Centre of Tourism and Leisure”. These strategies includes promoting the city into a world recognised city and a hub that brings together diversified tourism products, unique culture and heritage, quality service, marketing strategy, smart technology and sustainable development all within a livable city.

“Macao Tourism Industry Development Master Plan” is a plan for building and managing a tourist destination economy.
1. INTRODUCTION
1.1 PROJECT BACKGROUND AND IMPORTANCE

Planning Background

To support the Macao SAR Government’s involvement in the Central Government’s “Belt and Road” Initiative and to become part of the development of a city cluster in the Guangdong-Hong Kong-Macao Greater Bay Area, MGTO initiated the compilation work of the “Macao Tourism Industry Development Master Plan”, to fully leverage Macao’s position and function in the scope of the national development. Macao can be developed as the core city in the region and its strength as a tourist destination.

4 “Belt and Road” Initiative

Initiated in October 2013 by the President of the People’s Republic of China, Xi Jinping, the “Belt and Road” Initiative provides a visionary blueprint for global economic development. The “Belt and Road” routes cover more than 60 countries and regions from Asia to Europe via Southeast Asia, South Asia, Central Asia, West Asia and the Middle East. It is expected to bridge the countries through infrastructure investment and thus accelerate economic growth. The provision of easy access strengthens the connection between Macao and the world which stimulates tourism growth and opening up to more source markets. This will enable Macao to explore opportunities through tourism cooperation with both international and national partners.

5 Development of the Guangdong-Hong Kong-Macao Greater Bay Area

In October 2016, Chinese Premier Li Keqiang pledged support from the Central Government and announced there will be 19 new measures and policies to favour Macao, aimed at making better use of its position as a “World Centre of Tourism and Leisure” and a “commercial and trade cooperation service platform between China and Portuguese-speaking countries”.

In March 2017, Chinese Premier Li Keqiang proposed in the annual “Government Work Report” to formulate the “Guangdong-Hong Kong-Macao Greater Bay Area City Cluster Development Plan”.

In the past years, Macao has established various cooperation framework for tourism development with cities in the Bay Area. The formulation of the “Guangdong-Hong Kong-Macao Greater Bay Area” national strategy will deepen the cooperation between Macao and the regional cities, so as to speed up the integration of industries and foster the economic growth in the Bay Area.
Positioning Macao as a “World Centre of Tourism and Leisure” was first announced by the National Development and Reform Commission at the end of 2008 in the “Outline of the Plan for the Reform and Development of the Pearl River Delta” and this positioning is also supported by the National “12th Five-Year Plan” in 2011. In early 2015, the Macao SAR Government submitted to the Central Government the Macao chapter recommendation of the National “13th Five-Year Plan”. The Chief Executive of the Macao SAR Government launched the “Committee for Development of the World Centre for Tourism and Leisure” in October 2015 for Macao to achieve the vision of “World Centre of Tourism and Leisure”.

- December 2008
  - The Outline of the Plan for the Reform and Development of the Pearl River Delta (2008-2020)
  - The outline mentioned Macao shall stand-up the positioning as a “World Centre of Tourism and Leisure”.
- March 2011
  - Framework Agreement on Cooperation between Guangdong and Macao
  - Supporting Macao to develop into a “World Centre of Tourism and Leisure” and expedite its development as a “Service Platform for Trade Co-operation between China and Portuguese-speaking Countries”.
- 2015
  - The Macao SAR Government submitted suggestions to the Central Government the Macao chapter recommendation of the National “13th Five-Year Plan” which speeded up the process of developing Macao into a “World Centre of Tourism and Leisure”, as well as a “Service Platform for Trade Co-operation between China and Portuguese-speaking Countries”.
- October 2015
  - Establishment of the “Committee for Development of the World Centre for Tourism and Leisure”
  - The Committee assists the Macao SAR Government in transforming Macao into a “World Centre of Tourism and Leisure” by conducting study and top-level design, formulating relevant strategies and coordinating the development plan of Macao for the next five years.
1. INTRODUCTION

1.1 PROJECT BACKGROUND AND IMPORTANCE

Review of Round Table Seminar: How to Build a “World Centre of Tourism and Leisure”

MGTO hosted a Round Table Seminar towards “How to Build a World Centre of Tourism and Leisure” in June 2011. Representatives related to the tourism industry were invited to express and share their ideas and suggestions at the seminar on how to achieve the goal of developing Macao into a “World Centre of Tourism and Leisure” parameters, overall planning and concrete measures towards this positioning.

Chief Executive’s 2012 Policy Address: Characteristics of a “World Centre of Tourism and Leisure”

A “World Centre of Tourism and Leisure” is generally defined as a renowned destination with world-class standard that offers quality public health facilities, a safe environment and a good ecosystem, a place for healthy living, happiness, entertainment and one that offers opportunities for business and other purposes.

Review of PATA/ Macao Task Force Report on Macao Tourism Positioning: Towards a World Centre of Tourism and Leisure

Pacific Asia Travel Association (PATA) published a Macao Task Force Report in 2012, which suggested an overall positioning of Macao as:

“An accessible and diversified world-class urban tourism destination in the Pearl River Delta Region”

1. INTRODUCTION
1.1 PROJECT BACKGROUND AND IMPORTANCE

The PATA/ Macao Task Force Report recommends 10 strategies to achieve the desired positioning as a “World Centre of Tourism and Leisure”.

1. Develop a Comprehensive Macao Tourism Master Plan
2. Make Macao accessible to the world
3. Reposition Macao as a world-class and diversified tourism destination
4. Identify and invest in market growth segments and new marketing/branding strategy
5. Use business events as the platform for growth and cooperation between Macao and Pearl River Delta
6. Diversify Macao’s tourism products
7. Improve tourism quality standards
8. Ensure adequate human resource capacity
9. Adopt a sustainable tourism development approach
10. Create an umbrella Destination Management Organisation (DMO)

1. INTRODUCTION
1.1 PROJECT BACKGROUND AND IMPORTANCE

Tourism Industry and the Five-Year Development Plan of the Macao Special Administrative Region

In order to achieve the goal of transforming Macao into a “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. The Macao SAR Government has also compiled “the Five-year Development Plan of the Macao Special Administration Region (2016-2020)” (hereinafter as “the Five-Year Plan”) with the goal to stabilise the economic growth, expedite the city’s transformation into a “World Centre of Tourism and Leisure”, and improve the livelihood of local residents.

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

Under the guidance of the “Five-Year Plan”, the “Macao Tourism Industry Development Master Plan” formulates future goals and strategies to in line with the SAR Government’s development vision. In addition to the analysis of the current situation of Macao’s tourism, the Master Plan proposes short, medium and long term strategies for the tourism product system, source markets, tourism branding and positioning, as well as tourism and urban development.

These strategies echo the development goals in the “Five-Year Plan”, including the development directions of “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 SAR Government’s “Five-Year Plan”

- Stable development of the overall economy
- Further optimisation of industrial structure
- Gradual formation of business environment for tourism and leisure industries
- Continuous improvement in people’s quality of life
- Continuous development in culture and education
- Efficient and effective environmental protection
- Further improvement in administrative efficiency and legal governance
1. INTRODUCTION
1.1 PROJECT BACKGROUND AND IMPORTANCE

Guiding Principles of the 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 “Macao Tourism Industry Development 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 Tourism and Leisure Industries

Offering diversified products and experiences for a wide variety of visitors, and 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 an 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. The investment and construction of various integrated resort facilities give opportunity to maintain and improve the quality of tourism products.

Cultural Tourism

To elaborate the uniqueness of Macao’s history and culture, as well as to create a culturally diverse destination with rich content. Continuing to nurture the city’s culturally diverse and rich tourism experience will attract the worldwide visitors and foster the development of the creative industries of the city.
1. INTRODUCTION
1.1 PROJECT BACKGROUND AND IMPORTANCE

Macao’s Vision

Macao - World Centre of Tourism and Leisure

World
World Recognition

Centre
A Destination Hub

Tourism
Hospitality, MICE, Events, Gaming & Entertainment, Cultural Experience, Shopping

Leisure
Quality of Life, Dining, Sport, Cultural Heritage
1. INTRODUCTION
1.2 PROJECT SCHEDULE AND PROCESS

The “Macao Tourism Industry Development Master Plan” is developed into three phases, each with the following key processes and deliverables:

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1. INTRODUCTION

1.3 INTERNATIONAL FORUMS

Two international forums were held in Phase I and Phase II respectively, inviting international experts, tourism related government departments and associations with in-depth and targeted discussion upon tourism development in Macao. Through brainstorming, exchange of ideas and sharing, the international forums provided opportunity to develop effective strategies and action plans which are beneficial to the future development of the Macao tourism industry.

**International Forum I**

Organised on 10 September in 2015, this forum targeted to explore the potential and development direction of the Macao’s tourism industry, and the opportunities and challenges of positioning Macao as the “World Centre of Tourism and Leisure”.

The forum invited nine international, Mainland China and Hong Kong experts. The line-up of experts included Professor Lin Jiang, Head of Public Finance and Taxation Department of Lingnan College at Sun Yat-Sen University, Alastair Morrison, expert in tourism marketing and branding, Dain Simpson, with expertise in forecasting trends and tourism product analysis, Bill Calderwood, expert in national tourism development, Dr. Jason Ni, Assistant Professor of Department of Architecture and Civil Engineering at City University of Hong Kong, Tom Farney and Eric Rankin, experts of innovative technology in destination management and Christian Low, expert in tourist destination design.

The major contents of the forum include:

- Goals and KPIs of a “World Center of Tourism and Leisure”;
- Development of the preliminary planning proposals and action plans.
1. INTRODUCTION
1.3 INTERNATIONAL FORUMS

**International Forum II:**

The second International Forum was held on 25-26 February 2016, inviting eight international, Mainland China, Hong Kong and Macao experts to deliver speeches on specific topics and exchange ideas with MGTO, tourism related government departments and professional organisations through group discussions.

The line-up of experts included Kevin B. Murphy, Past Chairman of the Pacific Asia Travel Association (PATA) Executive Board, Professor Lin Jiang, Head of Public Finance and Taxation Department of Lingnan College at Sun Yat-Sen University, Bill Calderwood, expert in national tourism development, Dr. Jason Ni, Assistant Professor of Department of Architecture and Civil Engineering at City University of Hong Kong, Tom Farney and Eric Rankin, experts of innovative technology in destination management, Professor Davis Fong, Director of Institute for the Study of Commercial Gaming, as well as Associate Professor of Hospitality and Gaming Management Programme at University of Macau and Dain Simpson, with expertise in forecasting trends and tourism product analysis.

This international forum explored different development scenarios and the corresponding strategies and implementation actions. It also conveyed the importance of effective cooperation among different departments and sectors. The major contents of the forum include:

- Explore the variation in terms of tourism 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 the future development of Macao tourism.

*Image Source: Macao Government Tourism Office*
1. INTRODUCTION
1.4 SURVEY

To better understand the perceptions and satisfaction levels surrounding 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 “Macao Tourism Industry Development Master Plan”.

Visitor Survey

Two sets of visitor surveys were conducted from 8 to 17 October 2015 and from 12 to 20 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 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 in each survey. 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, tourist attractions and border check points.

• The result shows that visitor satisfaction levels ranked lowest in the areas of transportation and the diversity of tourism product 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 the areas that require attention and actions to mitigate in the tourism development of Macao.

Source: Visitor Survey conducted and arranged by the Project Team
1. INTRODUCTION
1.4 SURVEY

Resident Survey

The resident survey was conducted by phone interviews from 31 July to 1 August 2015, with a total of 508 valid responses collected during the period. 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 it has affected their everyday lives.

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. 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 impact of 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 the growing tourism in the city. Many residents felt that this was an area that requires significant improvement should the vision of developing Macao into a “World Centre of Tourism and Leisure” be realised. It was commonly suggested that the public transport network should be improved to meet the demands from both 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, entertainment and leisure activities.

• It was noted that service qualities should be improved, in particular towards the service providers in certain sectors, such as tour guides and taxi drivers.

Source: Resident Survey Conducted and Arranged by the Project Team
Public consultation was a critical study process of the Master Plan. The consultation was conducted from 23 May to 22 July 2016. A series of promotion were conducted to increase public involvement in the consultation. The methods for promoting public consultation were as follows:

- **Roadshows**: Conducted in 6 main city locations
- **Bus advertising**
- **Official website**
- **Newspapers advertising**
- **Public consultation paper and flyers**
- **Street and lamp-post banners**
- **TV broadcasting**
- **Radio broadcasting**

### Roadshows Period

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<td>26 May – 16 June, 2016</td>
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<td></td>
<td>23 June – 22 July, 2016</td>
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<tr>
<td>Open area adjacent to the Garden of Flower City, Taipa (near Rua de Seng Tou)</td>
<td>23 May – 4 June, 2016</td>
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<tr>
<td>Tap Seac Square</td>
<td>16 June – 27 June, 2016</td>
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<tr>
<td>Rotunada Carios da Maia (Three Lamps District)</td>
<td>28 June – 8 July, 2016</td>
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<td>Amizade Square</td>
<td>9 July – 22 July, 2016</td>
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*Image Source: Macao Government Tourism Office*
1. INTRODUCTION
1.5 PUBLIC CONSULTATION

In order to provide a better understanding, consultation paper and leaflets were produced to introduce the Master Plan to the general public. The consultation paper was composed of five major sections:

1) Planning background;
2) Baseline analysis and challenges;
3) Guiding principles for the Macao Tourism Industry Development Master Plan;
4) Goals and strategies; and
5) Scenario forecast and evaluation.

*Image Source: Macao Government Tourism Office*
Six public consultation sessions and exchange sessions were held to gather opinions from tourism stakeholders. The participants included tourism related government departments, industry, professional organisations, consultation committees, educational institutions and the general public. The detailed information for each session is listed as below.

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<th>Consultation Sessions</th>
<th>Date</th>
<th>No. of Attendees</th>
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<td>Public Consultation 1</td>
<td>28 May, 2016</td>
<td>&gt;60</td>
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<tr>
<td>Public Consultation 2</td>
<td>11 June, 2016</td>
<td>~70</td>
</tr>
<tr>
<td>Special Consultation Session (Conselho Consultivo de Serviços Comunitários)</td>
<td>17 June, 2016</td>
<td>13</td>
</tr>
<tr>
<td>Exchange Session 1 (Industry and professional organisations)</td>
<td>18 June, 2016</td>
<td>56</td>
</tr>
<tr>
<td>Consultation Committee Session (Tourism-related Consultation Committee)</td>
<td>4 July, 2016</td>
<td>40</td>
</tr>
<tr>
<td>Exchange Session 2 (Industry and professional organisations)</td>
<td>9 July, 2016</td>
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Image Source: Macao Government Tourism Office
1. INTRODUCTION
1.5 PUBLIC CONSULTATION

The various public communication sessions brought in a total of 1,185 responses; the majority of these were from consultation sessions, emails and written comments.

Eleven categories were identified after consolidating the 1,185 responses:

1) Tourism Resources and Products
2) City Development
3) Visitor Source Markets and Target Segments
4) Tourism Quality and Service
5) Issues Related to the Consultation Paper
6) Marketing and Promotion
7) Tourism Management
8) Tourism Development Strategies
9) Tourism Branding and City Positioning
10) Regional Tourism Cooperation
11) Current Tourism Development Condition

The majority of the comments relate to four categories: Tourism Resources and Products (357 comments); City Development (206 comments); Visitor Source Markets and Target Segments (126 comments); and Tourism Quality and Service (125 comments). MGTO organised and analysed the public input to integrate into the Master Plan, so as to propose strategies and suggestions for the sustainable development of Macao tourism.
1. INTRODUCTION
1.6 PROJECT TOPIC AREAS

Having reviewed the situation of Macao tourism, eight specific topics covering all facets of the tourism industry in Macao have been identified and studied:

1. **Tourism Resources and Products System**: This chapter discusses all facets of cultural, historical, current status, natural resources and products of tourism, including the full range of visitor services, businesses and events. New programmes and developments to diversify tourism are suggested for future implementation.

2. **Tourism Quality and Service System**: This chapter discusses quality systems, human resources and skills training. It explores the measures to improve service quality of the industry.

3. **Tourism Branding and Marketing Strategies**: This chapter describes all facets of market trends, target markets, marketing programmes and brand message, while providing suggestions on upgrading marketing systems and promoting branding message.

4. **Tourism Industry and City Development**: This chapter covers the development of the city, potential areas for rejuvenation and development, as well as environmental improvement.

5. **Tourism Carrying Capacity**: This chapter evaluates current and future capacity forecasts for transportation, border points, tourist services and society in general to handle the increases in visitors.

6. **Tourism and the Application of Innovative Technology**: This chapter discusses a wide range of new technology for industry management, security, tourism marketing and promotion, and smart tourism.

7. **Tourism Industry Cooperation System**: This chapter covers a review of tourism-related laws, tourism industry cooperation issues, and recommends changes in legislation, and methods to improve cooperation, as well as information-sharing systems.

8. **International and Regional Tourism Cooperation and Development**: This chapter explains key issues identified for regional cooperation, joint activities and events with regional cooperating cities. It also gives recommendations to raise the profile of Macao in the international tourism community.
1. INTRODUCTION

1.7 PROJECT APPROACH

The study of the “Macao Tourism Industry Development Master Plan” followed five key steps, starting with a situational assessment of all facets of the tourism industry. This assessment led to the identification of key issues, competitive strengths and gaps. Extensive efforts were made to get public and experts reviews and inputs through international forums, public consultation, department interviews and solicitation of comments and suggestions.

Based on these five steps, key objectives and strategies were created. These strategies led to the corresponding planning proposals and action plans for implementation.
CHAPTER 2
MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.1 INTRODUCTION

This chapter presents several key issues and trends in the global tourism environment. These issues have direct or indirect impact on Macao and Macao's goal of becoming the World Centre for Tourism and Leisure.

The “Macao Tourism Industry Development Master Plan” has prepared eight specific reports, each of which clearly identifies key objectives and strategies. Then, it is accompanied by relevant planning proposals and action plans to achieve Macao's vision as the World Centre for Tourism and Leisure. The comprehensive report's chapter 3 to chapter 10 summarise the contents of the specific topic reports.

This chapter includes the following sections:

2.1 Introduction
2.2 Macao and Competitive Destinations
2.3 Key Issues and Trends in Tourism
2.4 Achievement of Overall Goal – World Centre of Tourism and Leisure
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.2 MACAO AND COMPETITIVE DESTINATIONS

2.2.1 GLOBAL PICTURE OF TOURISM DEVELOPMENT

The World Economic Forum published “The Travel & Tourism Competitiveness Report” in 2015. The study evaluated 141 counties and regions by 14 criteria. Although Macao is not included in the assessment, the study is an important reference for Macao and can help Macao to understand the requirements for competitive destinations.

Based on the research, top 20 destinations are listed in the adjacent table. Cities located in highlighted countries are considered as competitive tourist destinations that Macao could learn from, including:

- Paris in France
- Las Vegas in US
- London in UK
- Sydney in Australia
- Singapore
- Hong Kong SAR

### The Travel & Tourism Competitiveness Index 2015 Framework

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<tr>
<th>Travel &amp; Tourism Competitiveness Index</th>
<th>Enabling Environment</th>
<th>T&amp;T Policy and Enabling Conditions</th>
<th>Infrastructure</th>
<th>Natural and Cultural Resources</th>
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<td>Air Transport Infrastructure</td>
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<td>International Openness</td>
<td>Ground and Port Infrastructure</td>
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<td>Tourist Service Infrastructure</td>
<td>and Business Travel</td>
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<td>Human Resources and Labour Market</td>
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<td>ICT Readiness</td>
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### Top 20 of The Travel & Tourism Competitiveness Index 2015 Ranking

<table>
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<tr>
<th>Ranking</th>
<th>Country/ Region</th>
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<td>1</td>
<td>Spain</td>
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<td>20</td>
<td>Norway</td>
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2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.2 MACAO AND COMPETITIVE DESTINATIONS
2.2.1 GLOBAL PICTURE OF TOURISM DEVELOPMENT

The comparison of competitive performance by countries/regions are shown as below; each index is analysed by pillar with performing countries/regions. The factors which competitive countries/regions rate higher (5 of 7 countries/regions rate 5 or more) include business environment, safety and security, health and hygiene, human resources, ICT readiness, prioritization of travel and tourism, air transport and tourist service infrastructure. These are areas which Macao should pay particular attention in order to become a top competitive tourist destination.

The Travel & Tourism Competitiveness Index 2015 – Performance of Competitive Countries/Regions

Source: Research Team
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.2 MACAO AND COMPETITIVE DESTINATIONS

2.2.2 THE POSITIONING OF MACAO TOURISM DEVELOPMENT

The competitive cities mentioned in Tourism Development Global Picture are selected to compare with Macao for the current positioning of Macao’s tourism development, while both Mapping Diagram and Spider Diagram are applied for the comparison analysis.

**Global: London, Paris, Dubai, Las Vegas and Los Angeles**

The selected cities are all world-class tourist destinations. For the future development of Macao’s tourism industry, it is significant to learn from these cities in terms of city branding, marketing, tourism positioning and tourism products diversification.

**Asia Pacific Region: Hong Kong, Singapore, Sydney, Bangkok and Kuala Lumpur**

These cities are all the key tourist destinations in the Asia Pacific region which relatively compete with Macao in terms of tourism industry. Besides, some cities (i.e. Hong Kong and Singapore) are doing well at tourism products diversification, which are important case examples for Macao to learn from.
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.2 MACAO AND COMPETITIVE DESTINATIONS
2.2.2 THE POSITIONING OF MACAO TOURISM DEVELOPMENT

Mapping Diagram

Five cities are identified for comparison analysis as global tourist destinations, they are **London, Paris, Dubai, Las Vegas and Los Angeles**. All five cities are within the top 30 global cities in terms of international arrivals. In addition, these cities have some attributes similar to Macao:

- Las Vegas: modern city which is famous for gaming and MICE.
- Los Angeles: large-scale attractions and the leading city for American entertainment industry.
- London and Paris: cities with historic, cultural and commercial elements.
- Dubai: modern city with luxury retail and man-made attractions.

The position of Macao and the five cities are as shown in the diagram. With a growing emphasis on tourism development and MICE, Macao can improve its position for business tourism.
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.2 MACAO AND COMPETITIVE DESTINATIONS

2.2.2 THE POSITIONING OF MACAO TOURISM DEVELOPMENT

Spider Diagram

Five indicators are concluded to assess the performance of Macao’s tourism industry with comparison with the global tourist destinations. Each indicator has specific evaluation index as shown below:

- **Visitation** (Number of total visitors and international overnight visitors)
- **Tourism Products Diversification** (Tourism products focus, visitors’ average length of stay)
- **Tourism Products Quality** (Include both tourism facilities' quality and service quality)
- **Scale of Facilities** (Number of hotel rooms and iconic attractions)
- **Airport Capacity** (Visitor arrivals via airport)

Each indicator is divided into 5 levels (Level 0-4), the higher the score, the better the performance.

In conclusion, Macao is doing well on visitation; however, it is far behind other cities in terms of airport capacity, as well as tourism products diversification and quality.
Five cities are identified for comparison analysis as tourist destinations within Asia Pacific. They are Hong Kong, Singapore, Sydney, Bangkok and Kuala Lumpur. Four of the five cities are within the top 30 global cities in terms of international arrivals. In addition, these cities have some attributes similar to Macao:

- **Hong Kong**: Asia’s financial center, modern city which is famous for shopping;
- **Singapore**: modern city which has success on diversifying tourism products;
- **Sydney**: leisure harbor city with well-preserved and developed cultural facilities;
- **Bangkok**: Mixing historical and leisure, popular among Asians;
- **Kuala Lumpur**: pre-colonial city which is leisure and historical.

The positioning of Macao and the five Asia Pacific cities are as shown in the diagram. With a growing emphasis on tourism development and MICE, Macao can improve its position on business tourism.

*Source: Euromonitor International: “Top 100 City Destinations Ranking”, 2015.*
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.2 MACAO AND COMPETITIVE DESTINATIONS

2.2.2 THE POSITIONING OF MACAO TOURISM DEVELOPMENT

Spider Diagram

The 5 indicators are applied again to compare Macao with the 5 Asia Pacific tourist destinations:

- **Visitation** (Number of total visitors and international overnight visitors)
- **Tourism Products Diversification** (Tourism products focus, visitors’ average length of stay)
- **Tourism Products Quality** (Include tourism facilities’ quality and service quality)
- **Scale of Facilities** (Number of hotel rooms and iconic attractions)
- **Airport Capacity** (Visitor arrivals via airport)

Each indicator is divided into 5 levels (Level 0-4), the higher the score, the better the performance.

In conclusion, Macao has already been one of top tourist destinations in Asia Pacific; however, it is still far behind other Asian competitors in terms of accessibility and tourism products diversification.

The future development of Macao is shown as dashed line assuming both improvements in Macao’s tourism development and increase in regional cooperation.
Both mapping diagram and spider diagram show the comparison between Macao and other global tourist destinations, the major conclusions are as below:

- Macao is doing well on visitation and has already been one of top tourist destinations in Asia Pacific; however, it has room to improve tourism products diversification and quality;
- Due to small land area in Macao, there is limited space for airport expansion which has made Macao’s air accessibility weaker than other international destinations.

The Improved Macao scenario assumes significant upgrades to tourism product diversification and quality. However, the diversification of tourism products and the development of airport capacity are still subject to land resources and air transport conditions.

The Improved Macao + Regional Cooperation scenario takes advantage of regional resources. A direct and seamless connection to Hong Kong International Airport will improve accessibility of Macao, while integrated development with Zhuhai and Hengqin can improve product diversity and quality.
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.2 MACAO AND COMPETITIVE DESTINATIONS
2.2.3 SWOT ANALYSIS OF MACAO TOURISM

**SWOT Analysis of Macao Tourism**

**Strengths (S):**
- Unique location in Pearl River Delta;
- Unique blend of Chinese and Western culture with 500 years of cultural exchange;
- High reputation as gaming destination, with integrated resorts;
- Historic Centre of Macao under the UNESCO World Heritage List;
- Famous festivals and events destination, such as Macao Grand Prix (celebrating over half century).

**Weaknesses (W):**
- Limited land and natural resources;
- Limited labour force;
- Limited carrying capacity and tourism supporting infrastructure;
- Uneven product development, money flows over reliant on casino and gaming sector, lack of tourism products diversification;
- Limited MICE function spaces;
- Relatively low capacity of airport, limited public ground transportation options.

**Opportunities (O):**
- Good opportunity to develop new reclamation areas;
- A powerful attraction to large potential Asian tourism markets;
- Future advantage from the “Belt and Road” Initiative and the development of “Guangdong-Hong Kong-Macao Greater Bay Area Urban Cluster”; especially with the completion of Hong Kong-Zhuhai-Macao Bridge will facilitate regional tourism development;
- Unique cultural background, big potential to develop cultural and heritage attractions related to arts, maritime, history, etc.;
- Leverage gaming incomes to support the development of other potential tourism products and projects.

**Threats (T):**
- Tourism competition from nearby regions, such as Hong Kong, Zhuhai, Guangzhou, Shenzhen, etc.;
- Gaming industry competition from Singapore, Malaysia, Philippines, Korea and Cambodia;
- Further controls on border crossing and money flows from PRC;
- Future labour force may be insufficient to support tourism industry;
- Residents discontent with the problems brought by unmanaged tourism growth.

Source: Macao Government Tourism Office: “Round Table Seminar: How to Build a World Centre of Tourism and Leisure”, 2011;
Project Team.
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.3 KEY ISSUES AND TRENDS IN TOURISM
2.3.1 INTRODUCTION TO KEY ISSUES

It is clear that the global tourism industry is getting more competitive, in which a comprehensive study on the key tourism issues is critical to understand the development direction for Macao.

The “Macao Tourism Industry Development Master Plan” has been an intensive and thorough process which has involved several complex layers of research and investigation in the tourism industry. During the process, complete and detailed baseline assessments were established through research and extensive interviews with stakeholders, international forums and advice from tourism industry experts. These findings have led to the identification of several key issues affecting Macao and its tourism industry.

Through understanding these ten key issues, research on best practices and future trends were conducted and have been incorporated as the basis for the development objectives, strategies, planning proposals and action plans contained within the “Macao Tourism Industry Development Master Plan”. The ten key issues, which will be explained in more details, include:

1. Balancing between Tourism and Social Development
2. Harnessing the Surge in Regional Tourism
3. Responding to the Growing Competition in Tourism
4. Increasing the Value of Tourism
5. Utilising Innovative Technology
6. Spurring Diversity of Tourism Products
7. Effective Utilisation of Land Resources
8. Managing Overcrowded Tourism Areas
9. Reducing the Environmental Impact of Tourism
10. Cooperating with Industry Stakeholders

Image Source: Macao Government Tourism Office
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.3 KEY ISSUES AND TRENDS IN TOURISM

2.3.2 BALANCING BETWEEN TOURISM AND SOCIAL DEVELOPMENT

TOURISM INDUSTRY DEVELOPMENT CAN HAVE BOTH BENEFITS AND NEGATIVE IMPACTS: Tourism can have tremendously positive effects on the local community and economy, for example visitors through their hotel, dining, retail and leisure spending, are a great source of financial benefits and employment, and beneficial to the local economic growth. Meanwhile, tourism development can stimulate cultural appreciation in the local elements. The visitor expenditures also generate tax revenue and fund government programmes for infrastructural and social improvement. On top of this, it is not unusual for many of these restaurants or shops to be run and operated by local residents, providing job and income opportunities. Due to the ever evolving nature of the tourism industry, opportunities for local residents to improve themselves are also present. Skill upgrading through training and self development programmes offered by the industry can help to build up the capabilities and aptitudes of local residents, aiding in self actualization.

However, when the influx of visitors is too large and the land area is insufficient, it will bring different degrees of negative impact to the society. During the tourism development process, the residents will feel inconvenient when resources are not replenished in a timely manner, particularly in smaller destinations like Macao. Following the increasing visitor arrivals to Macao, residents living in popular tourist spots will face more road traffic and more crowded streets. The problem can also extend to public transportation with public buses and taxis being widely used among the local residents and visitors. Higher living expenses and environmental degradation are also the concerns. However, many of these issues can be addressed through proper management.

The Master Plan strongly supports the interests of Macao residents and community by maximizing the benefits of tourism and minimizing negative impacts. A comprehensive tourism carrying capacity analysis identified critical social and physical issues now and in the future. Key Performance Indicators (KPI) have been identified and are expected to be monitored on an on-going basis. Key plans and actions are recommended to monitor the KPIs so to improve the quality of life of residents and enhance the skills of the tourism industry.
REGIONAL TOURISM IS INCREASING, THERE IS OPPORTUNITY FOR MACAO TO HARNESS THESE NEW SOURCE MARKETS: As global economies recover and levels of disposable income increase, outbound tourism in Asia is surging and expected to grow rapidly over the next decade and beyond. China is at the epicenter of this growth, recording double-digit annual tourism growth rates on a consistent basis, although recent trends have seen outbound Chinese tourists favoring international destinations rather than travelling within Greater China. Meanwhile, a large number of Asian countries are reaching higher levels of affluence and are producing a increasing number of outbound travellers. India, for example, a potential market of over one billion population, has seen a phenomenal spurt in outbound tourism and is slated to be the fastest growing international travel market after China.

These outbound markets encompass a wide range of traveller profiles and will transform the regional travel and tourism landscape. Rapid economic progress in developing countries and stable growth in developed economics are promoting more business travel, MICE events, high net worth individuals, middle class families, and a new younger and connected generation of travellers. These market segments are expected to drive the future of tourism in Macao and should be specifically targeted in marketing and product offerings. Growth and advancement in travel technology have also resulted in the rise in low cost transport options with many new low cost airlines coming into the market together with the existing and legacy airlines expanding in a fast and aggressive fashion. As Macao aims to source new visitor markets, special attention can be placed on these emerging market segments which provide a good mix of business, leisure and high-end travellers.

The Master Plan recommends brand and marketing strategies, events and innovative technologies, to help achieve these goals. However, given the varying travel characteristics and product preference of these travellers, Macao needs to develop and refine additional and more diverse tourist options covering lodging, leisure and cultural activities. Macao’s rich history, culture and people are its greatest asset and regional tourists are seeking to appreciate the uniqueness of Macao.
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.3 KEY ISSUES AND TRENDS IN TOURISM
2.3.4 RESPONDING TO THE GROWING COMPETITION IN TOURISM

COMPETITION IN THE TOURISM INDUSTRY IS RISING: Macao is one of the most popular tourist destinations in the Asia Pacific Region. However, following the rising competitiveness of the regional destinations such as Thailand, Korea and Japan, Macao needs to develop a more diversified tourism offering to maintain its attractiveness to visitors. Visitors from Macao’s major source market, the People’s Republic of China, are increasing fearing and travelling to short and long haul international travel, with more countries which are relaxing visa policies and building transportation infrastructure to attract regional tourism, increasing competition can be seen in terms of diverse product offerings, sophisticated marketing, unique culture and ease of access.

REGIONAL GAMING DESTINATIONS ARE DEVELOPING AT AN INCREDIBLE PACE: Macao has long been Asia’s leading gaming destination. However, in recent years, many countries have undergone legal and economic changes that had catalyzed the development of casinos and integrated resorts in their territories. Singapore, the Philippines, Australia and Malaysia all saw the introduction of large scale integrated resorts. Most recently, the South Korean government has earmarked sites in both Incheon and Jeju for large scale integrated resorts. Japan’s parliament, recently passed a law legalising casinos, which may lead to the development of several large-scale resorts across Japan. Cruise ships, with on-board casinos, are rapidly growing in number, offering the gaming market an all-inclusive experience.

The Master Plan suggests to utilise Macao’s unique culture and heritage with its strong tourism development foundation and improvements on regional infrastructure to remain competitive in the long term. By targeting high-value and high-growth markets, the tourism industry will remain vibrant for years to come. Macao will explore more cultural, entertainment and tourism products in order to provide a more diversified destination for visitors. This Master Plan proposes several key strategies to enable Macao to remain competitive by continually enhancing its tourism performance and also to explore the possibility of introducing new tourism areas like revitalised historic districts and new cultural and waterfront areas. In doing so, Macao will be able to retain its destination appeal even in the face of increased competition from the region and beyond.
Rich tourism offerings can increase visitors’ intention to stay. Accessible transport networks and connectivity are improving at a fast pace, this gives visitors the ability to have more choices over where they go and how they get there. This is particularly applicable to Macao where there is a variety of convenient transport options in and out of the city. This allows visitors to Macao to travel in and out of the city within the same day, which limits their experience in the city and their value to the economy. Although Macao is relatively small, the city can utilise its attractive accommodation, tourism attractions and cultural activities for visitors to stay and enjoy their time. Through the use of technology and online travel products, combined with unique history and culture, can facilitate different itineraries and provide visitors with more choices and enrich their experience, in order to encourage them to stay longer. By extending the length of stay, the value and positive contribution of tourism increase while reducing the problem of traffic congestion caused by same day visitors.

There are several strategies to promote higher value tourism, but the primary and most effective one would be to give visitors with places to stay and experience so that they will stay overnight in the city. The development of more hotels, attractions, cultural elements, MICE activities and events are viable ways to do so. Macao has a strong and rich cultural history and a unique culinary heritage not found anywhere else in the world. Macao should also look to improve the variety and options of alternative entertainment, beyond that of just gaming, and also to provide a diverse and unique experience in retail, dining and lodging sectors, too. Finally, the Master Plan suggests the rebranding of Macao as a multi-day destination to convey a clear message of the welcoming hospitality of Macao and attract high-value visitors.
2.3.6 UTILISING INNOVATIVE TECHNOLOGY

**THE ADVANCEMENT OF TECHNOLOGY HAS HUGH IMPLICATIONS ON THE TOURISM INDUSTRY:** Never more has technology played a greater role in the tourism industry than it does today. While most of it may go unseen, almost every facet of tourism relies, either directly or indirectly, on the internet and information technology. Even before embarkation on a particular trip, travellers spend considerable effort to understand the destination and itineraries. Social media platforms and online search engines often contribute to the destination selection process. Destination awards, accolades and reviews are published online, and more transparent and visible than ever. Hotel and travel reservations are often done online either by individual travellers themselves or the numerous travel agencies that act on their behalf. It is important for tourism sites to harness the communicative powers of technology to boost the marketing effectiveness and operational efficiency of the destination.

Tourists are becoming increasingly familiar, and even expectant, of technological comforts when they travel. Given the day-to-day reliance on smartphones and portable electronics, internet access is a core aspect of the visitor experience. Personalised mobile applications, which can deliver destination specific information and improve the visitor experience are growing in importance and are increasingly utilised by visitors. The use of technology can function as a two-way street. Macao tourism industry can harness these technologies to gather important tourism data for development and analyse visitor behaviours, such as visitor preferences, spending and seasonality patterns and even physical movements throughout the city, which can assist with the formulation of short and long-term action plans. Implementing the correct innovative technologies can improve the city’s safety, and increase visitors’ satisfaction.

Several strategies and technological applications are mature for implementation in Macao and the Master Plan identifies strategic areas and programmes in which this can be done. Innovative technology can increase marketing capabilities and cooperation between tourism partners. Innovative technologies can bring vitality and help visitors to understand and appreciate the cultural and heritage assets. Innovative technologies can be used to reduce congestion and increase the safety and convenience for the residents and tourists. Through effective application of new technologies, Macao has the opportunity to become an innovative destination and smart tourism city.

*Image Source: Macao Government Tourism Office*
VISITORS ARE BECOMING INCREASINGLY WELL-TRAVELLED AND DESTINATIONS NEED TO PROVIDE A COMPLETE EXPERIENCE TO REMAIN COMPETITIVE ON THE GLOBAL STAGE: The world is becoming increasingly globalised and travellers are more selective about their holiday or leisure destinations. Visitors no longer want to simply sightsee, but rather want to experience a destination. Cities around the world are now trying to offer the comprehensive tourism facilities with the goal to increase their competitiveness and attract these more experienced and knowledgeable individuals. As visitors develop an appetite for multidimensional experiences, destinations which offer just a single facet of entertainment will inevitably lose competitiveness in the global landscape. Many of the most popular leisure and tourist destination encompass a good mix of hospitality, shopping, dining, night-life, plus a variety of unique cultural and entertainment options. Some of the region’s most visited cities often have a diversified product mix catering to a spectrum of visitors. Repeat visitors can obtain a different experience each time they visit.

Product and itinerary aside, the quality and level of service that can be experienced in a particular destination is becoming increasingly important. Tourists are expecting higher level of service standard across all forms of service providers and any lapse in delivery can work against the destination image. Macao is particularly exposed to potential service issues as there is a huge number of people, both residents and non-residents, who are directly engaged in the tourism service industry.

The Master Plan strongly encourages the diversification of products such as using the water boundary area for seaside activities and sports, introducing new attractions and waterfront areas. New information technologies can deliver a richer and customised experience in the historic and cultural areas.

Image Source: Macao Government Tourism Office
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: Macao has a small land area compared to other world-class international tourism cities, but welcomes a large volume of visitors to the city on a daily basis. Tourism related facilities and projects require land, as do the transportation and infrastructure needed to support them. The construction of new reclamation areas together with other underutilised areas can be the new opportunities for the development of tourism in Macao.

In order to mitigate the potential negative effects of land scarcity, pragmatic and long-term measures should be explored earlier rather than later. Anticipating future need of land space and identifying areas which can be used can help to avoid any unforeseen problems down the road. This Master Plan puts forth several strategies to address the land limitations faced by the city and look towards revitalising the underutilised areas in Macao, while exploring the possibility of creating new tourism opportunities in portions of the reclamation and waterfront areas. These new tourism areas are away from the existing often crowded core areas and will serve to reduce congestion and impact on local residents. One of the planning proposals is that new tourism areas will also be areas for Macao residents to enjoy and improve their quality of life. The Master Plan proposes recommendations for the effective use of land resources and particularly the waterfront areas should be for all of Macao.
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.3 KEY ISSUES AND TRENDS IN TOURISM

2.3.9 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. Site management refers to the management of crowds and resources at specific dense tourist areas in a city. These sites are typically popular areas for tourists with some form of cultural, historical, gastronomical, leisure and entertainment significance. Due to the popular nature of such sites, these locations often face very high volume of visitors and vehicular traffic which may have a negative bearing on the site’s physical wellbeing, the visitor experience and the residents living in the neighborhood. In severe cases, an overwhelmingly large number of people in certain areas can lead to significant security and safety concerns, as well as degradation of the site itself. As such, it is important to understand and respect the balance that proper site management can bring to a destination.

The Historic Centre of Macao, for one, sees a huge volume of visitors and due to the Centre’s compact nature, overcrowding is not uncommon. Understanding the nature and movement of the crowds in the popular areas of Macao is important for effective management.

The Master Plan recommends traffic flow be improved through proper route planning, intentional diversions, proper signage, and coach parking as some of the ways to manage visitors and coach traffic more efficiently. Modern surveillance systems are recommended to monitor crowds and allow rapid response to security events. Finally the Master Plan also calls for the development of new tourism clusters to reduce congestion in the core areas of the city.

Image Source: Macao Government Tourism Office
THE TOURISM INDUSTRY CAN HAVE A PROFOUND IMPACT ON THE ENVIRONMENT: The pace in travel and tourism development has been increasing at a phenomenal rate in recent years. While tourism can have a large number of socio-economic benefits, one key area of concern is the impact of the tourism industry on the natural and urban environment. Due to the consumptive nature of the tourism industry, considerable demand is placed on the natural environment, both at the city level as well as on a regional or even global scope. Most travellers travel considerable distance to reach a destination and energy expenditure continues with the operation of local transportation and facilities. During the course of stay, power and water resources are supplied to hotels, resorts, restaurants and retail shops, in various forms. Water and solid waste are generated by visitors at the places they visit.

At the same time, tourist are becoming increasingly aware of their environmental footprint and are seeking to take proactive measures to reduce environmental impacts. Green hotel and recycling programmes are greeted warmly by business and leisure travellers. Minimizing environmental degradation should be a forefront concern for everyone in Macao and appropriate environment monitoring tools and rectification measures should be readily available in dense tourist areas. The Master Plan aims to promote environmental awareness through the promotion of green and environmentally friendly practices from the various hotels and resorts across Macao, as well as increased recycling initiatives in hotels and public areas. Wastewater treatment are recommended to be upgraded which also improves water quality for tourism use and water front environment.

Image Source: Macao Government Tourism Office
SUCCESSFUL TOURIST DESTINATIONS EXCEL AT COOPERATION, BOTH AT THE LOCAL AND REGIONAL LEVELS: The success of tourism in a particular destination is not down to any one single entity. This complex and wide-spreading industry is a web of interlinked and related parties and organisations. As tourists meander through a destination, they encounter many different places, businesses and people. While the actual service providers and tourist-focused establishments are often considered the forefront of the industry, strong support and the backing of both the local government and citizens are often key for success. Cooperation between government, the private sector and local residents is a key pillar of success. The relevant stakeholders in these successful destinations are often equally investing in their corporate development and the quality of the industry.

As far as possible, the relationship between entities should be complementary and cooperation between and within all key stakeholders is an important factor that should not be overlooked. Successful destinations have well established mechanisms for fostering cooperation.

While cooperation in the city is essential, it also extends to how the destination functions within its regional surroundings. The actions and effects of neighboring countries or territories can have a significant influence over the performance and potential of a particular tourist destination. In order to maximise mutual benefit, regional cooperation and understanding is necessary. Cooperation at the regional level can range from joint-infrastructural projects, such as cross-border access points, to cross border tourism events.

This Master Plan has identified several action plans to improve cooperation at local, regional and international levels. Local tourism advisory groups are recommended to enhance their role in defining policy, marketing and events, and foster public-private cooperation. The Master Plan defines cooperation related key performance indicators, which will be followed up and monitored. Regional cooperation actions related to access and border capacity are addressed.
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE

2.4.1 KEY OBJECTIVES AND STRATEGIES IN MARKING MACAO A WORLD CENTRE OF TOURISM AND LEISURE

As part of the Master Plan, eight key objectives have been identified which will enable Macao to propel itself as a “World Centre of Tourism and Leisure”. The eight key objectives are:

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
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE
2.4.2 THE KEY MESSAGES: TOURISM RESOURCES AND PRODUCTS

Diversify Tourism Products and Experience

• *Make Water Part of the Visitor Experience*
• *Add New Landmarks for Macao*
• *Create Memorable Experiences*
• *Increase the Retail Choice*
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE
2.4.3 THE KEY MESSAGES: TOURISM QUALITY AND SERVICE

Improve Service Quality and Skills

- Make Great Service a Macao Specialty
- Adopt Integrated Quality System
- Elevate to International Standards
Brand Macao as A Multi-day Destination

• **Target High-Value Markets**
• **Robust Online Marketing Promotion and Itinerary Planning**
• **Strengthen the MICE Organisation and Promotion**
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE
2.4.5 THE KEY MESSAGES: URBAN DEVELOPMENT

Through Urban Development to Improve the Residents’ Quality of Life and Visitors’ Experience

- Seamless Access to Macao from Nearby Regions
- Multipurpose Urban Development
- Plan New Tourism Areas
- Upgrade Local Transport
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2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE
2.4.6 THE KEY MESSAGES: TOURISM CARRYING CAPACITY

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- Redistribute Tourism Peak Demand
- Site Management of Tourism Areas
- Expand Human Resources
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE

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- **Promote the Application of Smart Tourist Destination**
- **Build a Multi-Function Data Platform**
- **Deploy Intelligent Security System**
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE

2.4.8 THE KEY MESSAGES: TOURISM INDUSTRY COOPERATION

Improve Tourism Management

- Enhance Public-Private Cooperation
- Optimise Cross-departmental Collaboration
- Integrated Data Sharing
- Review Tourism Legislation
Enhance Macao’s Tourism Position in the World

- Collaborate with Neighbors on Key Issues
- Promote Cross Boundary Tourism Products
- Attain International Recognition
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE

2.4.10 LINKAGE OF KEY ISSUES TO PLANNING PROPOSALS

10 Key Issues
- Balancing between Tourism and Social Development
- Harnessing the Surge in Regional Tourism
- Responding to the Growing Competition in Tourism
- Increasing the Value of Tourism
- Utilising Innovative Technology
- Spurring Diversity of Tourism Products
- Effective Utilisation of Land Resources
- Managing Overcrowded Tourism Areas
- Reducing the Environmental Impact of Tourism
- Cooperating with Industry Stakeholders

8 Key Objectives
- Diversify Tourism Products and Experiences
- Improve Service Quality and Skills
- Rebrand Macao as a Multi-day Destination and Expand High-value Markets
- Optimise Urban Development Model
- Manage Macao’s Tourism Carrying Capacity
- Utilise Innovative Technology
- Enhance Tourism Industry Cooperation
- Enhance Macao’s Position as a Core Tourism City in the Regional and International Tourism Community

Strategies
- 4 Strategies
  - Introduce New Tourism Elements
  - Develop Iconic Tourism Products
  - Enrich Visitors’ Experience
  - Expand Tourism Related Offerings
- 3 Strategies
  - Enhance Skills Development in Tourism Industry
  - Establish an Integrated Tourism Quality Assurance System
  - Enhance Service Standards of Tourism Industry
- 4 Strategies
  - Attract High-value Market Segments
  - Enhance the Macao’s Multi-day Destination Brand Image
  - Support and Promote MICE Development
  - Conduct Online Tourism Marketing

Planning Proposals and Action Plans
- 4 Planning Proposals
  - P 1.1 Introduce Marine Tourism Products
  - P 1.2 Develop Iconic Tourism Facilities
  - P 1.3 Richer Iconic Tourism Events and Experiences
  - P 1.4 Expand Hotel and Retail Offerings
- 3 Planning Proposals
  - P 2.1 Skills and Workforce Development for Career Path Planning
  - P 2.2 Implement a Learning Management System for Integrated Tourism Quality Assurance
  - P 2.3 Upgrade Tourism Services to International Standard
- 4 Overall Implementation Strategies
  - P 3.1 Enhance the Marketing for High-value Target Segments
  - P 3.2 Rebrand Macao as a Multi-day Destination
  - P 3.3 Strengthen the MICE Organisation and Marketing
  - P 3.4 Upgrade Online Marketing Systems and Content

22 Action Plans

9 Action Plans

12 Implementation Strategies
### 2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE

#### 2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE

##### 2.4.10 LINKAGE OF KEY ISSUES TO PLANNING PROPOSALS

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<th>Key Objectives</th>
<th>Strategies</th>
<th>Planning Proposals and Action Plans</th>
</tr>
</thead>
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<tr>
<td>1</td>
<td>Diversify Tourism Products and Experiences</td>
<td><strong>4 Strategies</strong></td>
<td><strong>4 Planning Proposals</strong></td>
</tr>
<tr>
<td>2</td>
<td>Improve Service Quality and Skills</td>
<td>✓ Introduce New Tourism Areas</td>
<td>P 4.1 Development of Potential Tourism Areas into New Tourism Spots</td>
</tr>
<tr>
<td>3</td>
<td>Rebrand Macao as a Multi-day Destination and Expand High-value Markets</td>
<td>✓ Upgrade of Ground Transport</td>
<td>P 4.2 Seamless Connection with Nearby Cities</td>
</tr>
<tr>
<td>4</td>
<td>Optimise Urban Development Model</td>
<td>✓ Monitor and Manage the Quality of Environment</td>
<td>P 4.3 Expansion of Environmental Measures</td>
</tr>
<tr>
<td>5</td>
<td>Manage Macao’s Tourism Carrying Capacity</td>
<td>✓ Improve Access to Macao</td>
<td>P 4.4 Improvement of Pedestrian Environment</td>
</tr>
<tr>
<td>6</td>
<td>Utilise Innovative Technology</td>
<td><strong>6 Strategies</strong></td>
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</tr>
<tr>
<td>7</td>
<td>Enhance Tourism Industry Cooperation</td>
<td>✓ Monitor Macao’s Tourism Carrying Capacity</td>
<td>P 5.1 Design KPI for Monitoring Macao’s Tourism Carrying Capacity</td>
</tr>
<tr>
<td>8</td>
<td>Enhance Macao’s Position as a Core Tourism City in the Regional and International Tourism Community</td>
<td>✓ Redistribute Peak Travel Demand</td>
<td>P 5.2 Site Management of Crowded Tourist Attraction Areas</td>
</tr>
</tbody>
</table>

**12 Action Plans**
2. MACAO AS THE WORLD CENTRE OF TOURISM AND LEISURE
2.4 ACHIEVEMENT OF OVERALL GOAL – WORLD CENTRE OF TOURISM AND LEISURE
2.4.10 LINKAGE OF KEY ISSUES TO PLANNING PROPOSALS

10 Key Issues

- Balancing between Tourism and Social Development
- Harnessing the Surge in Regional Tourism
- Responding to the Growing Competition in Tourism
- Increasing the Value of Tourism
- Utilising Innovative Technology
- Spurring Diversity of Tourism Products
- Effective Utilisation of Land Resources
- Managing Overcrowded Tourism Areas
- Reducing the Environmental Impact of Tourism
- Cooperating with Industry Stakeholders

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

Strategies

4 Strategies
- Formulate Viable and Up-to-date Tourism Law and Regulations
- Review the Licensing Mechanism
- Effective Cross-department Coordination and Management
- Strengthen Collaboration between Public and Private Sectors

Planning Proposals and Action Plans

4 Planning Proposals
- P 7.1 Review Tourism-related Laws and Legislation
- P 7.2 Refine the Licensing System
- P 7.3 Optimise Cross-departmental Collaboration
- P 7.4 Enhance Public-Private Cooperation

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3 Planning Proposals
- P 8.1 Strengthen Regional Government Cooperation in Key Issues
- P 8.2 Jointly Develop Strategic Tourism Products with Nearby Cities and Other International Cities
- P 8.3 Enhance International Recognition and Influence of Macao
CHAPTER 3
TOURISM RESOURCES AND PRODUCTS SYSTEM
3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.1 INTRODUCTION

Aligned with the vision for Macao to position itself as a “World Centre of Tourism and Leisure,” it is important for the tourism industry to concentrate on developing impressive and attractive tourism products, together with distinctive leisure experiences.

By definition, becoming a world centre means being highly recognised and sought-after globally; and becoming a “World Centre of Tourism and Leisure” relates to being outstanding in terms of development of the leisure and tourism industry. With this in mind, it is imperative that Macao offers a diversified and attractive tourism product and experience mix, as well as attract worldwide visitors. Furthermore, to achieve this vision, it is also important to understand the concerns of residents regarding the impacts of tourism development. It should be made clear that the benefits of tourism are paramount to the residents’ well-being in terms of employment and economic growth.

Key strategies for the use of tourism resources and development of tourism products are presented in this chapter. These strategies are supported by the baseline assessment on tourism resources and products, lessons from successful experiences of other world-class tourism destinations, and opinions gathered from the public consultation. The planning proposals are presented for future tourism product diversification; and each planning proposal is supported by short-, medium-, and long-term action plans, with contents covering the following:

This chapter includes the following:
3.1 Introduction
3.2 Analysis of Existing Conditions
3.3 Scenario Assessment
3.4 Key Objective and Strategies
3.5 Planning Proposals and Action Plans
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.2 ANALYSIS OF EXISTING CONDITIONS

Potential Tourism Clusters Redevelopment Area

- 1. Macao Peninsular - West and East-wing cluster area is one of the highest density tourism districts in Macao with a large number of abandoned old buildings that can possibly be used for future boutique hotels and retail development. The inner harbor area, which was once the most vibrant waterfront district in the city, is not well redeveloped.

- 2. Coloane area – several natural and environmental attractions requiring upgrades, while waterfront heritage is not well utilised.

Tourism Area under Construction

- 3. Cotai area - planned development area for large scale hotels and entertainment complexes, it has a certain number of high-end resorts which have already been constructed and opened to public, but some are still under construction. The area itself is becoming a well-developed tourism area in recent years.

Image Source: Project Team
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.2 ANALYSIS OF EXISTING CONDITIONS

New Reclamation Areas
To align with the consultation paper of the “New Reclamation Areas Master Plan”, the following land parcels have land use related to tourism development:

- **4.** Southern end of Zone A - a large cultural and commercial district is identified in this area.
- **5.** Zone B - the new government administrative centre and a MICE complex near Macau Tower are identified in this area.
- **6.** Zone C - a large commercial complex is included in the mixed use area.
- **7.** Zone D - partly identified for waterfront leisure tourism development, planned to introduce a major sightseeing point in Macao.
- **8.** Zone E – has superior access and is a mixed use commercial and cultural area.

“The Forth Space”
As stated in the “Macao SAR Urban Development Strategy Plan” (2016-2030), Macao has the opportunity to develop “The Forth Space” which relates to the water area at the southern part of Hac-Sa Beach, to promote and achieve economic diversification and Macao as a multiple high-end industrial centre.

Source: Land Public Works and Transport Bureau: “New Reclamation Areas Master Plan” Consultation Paper, 2015; Project Team
3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.2 ANALYSIS OF EXISTING CONDITIONS

- A tourism product is any product that is marketed by a country or an institution targeted at visitors so as to attract them to visit a country as visitors and experience the said product.

- The tourism products system is a system which includes a variety of tourism products to facilitate visitors and enrich their visiting experiences.

- The components of a tourism products system in Macao is summarised in the following categories:
  - Hotel
  - Food and Beverage
  - Retail
  - Gaming
  - Entertainment and Sports (including festival celebrations and various sports events)
  - MICE (including meeting, incentive, conference/convention and event)
  - Cultural Attractions (including tangible cultural heritage and intangible cultural heritage)
  - Natural Attractions

- The current situation of each category is summarised as below.
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.2 ANALYSIS OF EXISTING CONDITIONS

Hotel

- Macao has a fair number of existing high-end casino resorts, some still under construction. By the end of 2016, the total number of rooms of hotels and guesthouses was 37,634, of which 60 percent are five-star hotels.
- Macao has mostly high-end 4- and 5-star hotels. The lack of budget hotels has made the accommodation offerings in Macao imbalanced.
- The total number of hotel guests was consistently above 10 million each year. 2016 saw a significant increase in the number of hotel guests which amounted to 12 million, corresponding to an occupancy rate of 83%.

Source: Macao Government Tourism Office; Statistics and Census Services
3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.2 ANALYSIS OF EXISTING CONDITIONS

Food and Beverage

• Gastronomy is an important tourism resource in Macao. The number of restaurants and similar establishments in Macao has been on the rise from 1,529 in 2007 to 2,284 in 2015. In 2016, the per capita spending of visitor on food and beverage in Macao was reported at MOP 355, accounting for 20.9% of the total per capital spending of visitors.

• There is a wide variety of restaurants and similar establishments in Macao, including local-style cafes, congee and noodle shops, Chinese, Western and other Asian restaurants, which are creating a unique blend of Chinese and Western cuisines in Macao.

• Macanese cuisine is unique in Macao, consists of a blend of Portuguese cooking style and the Macao’s local favours. “Macanese Gastronomy” was inscribed on the Macao Intangible Cultural Heritage List in 2012, which has since been conserved and promoted.

• Macau Food Festival is an international annual event in Macao. It was first organised in 2000 and has been expanding since then. The Food Festival presents both the local and overseas gastronomic elements, bringing in an extraordinary gastronomic experience to residents and visitors.

• In order to further facilitate the diversified and sustainable development for Macao’s Food and Beverage Industry, the SAR Government has started the “Funding Scheme for Micro, Small and Medium Sized and Long-Established, Specialty Food Stores” in 2008, providing financial support to qualified food stores and retaining the traditional food culture. In addition, the “Macao’s Application Committee” was set up in 2016, directing the application for designation as a member of UNESCO Creative Cities Network in the field of gastronomy (City of Gastronomy), and further promoting and conserving Macao’s food heritage.

Source: Statistics and Census Services
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.2 ANALYSIS OF EXISTING CONDITIONS

Retail

- Shopping is the major portion on the spending structure of visitors, which accounts for 44% of visitors’ spending.

- Although the Historic Centre of Macao has been inscribed on the UNESCO World Heritage List, but the imbalanced distribution of retail shops caused over-crowding and traffic congestion.

- Compared to other world tourism destinations, high-end shopping is available in most of the large-scale resorts in Macao, however, Macao lacks variety in shopping options and vibrant waterfront shopping centres.

Source: Statistics and Census Services

Chart 3.6: Visitor’s Spending Structure (2016)
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.2 ANALYSIS OF EXISTING CONDITIONS

Gaming

- Macao holds a leading position in the global gaming market. Macao’s gaming revenue contributed 34 percent to the world’s total gaming revenues in 2015, however, the gaming revenue of Macao started to drop in 2014 and had a dramatic dip in 2015.

- Las Vegas is a case example of diversifying away from gaming, the percentage of gaming revenue to total revenue in Las Vegas dropped from 58.6% in 1984 to 34.2% in 2016, which means other spending (on hotel rooms, food and beverage, entertainment and others) increased. This is a positive sign for Las Vegas as it became less dependent on one industry.

- When comparing Macao with Las Vegas, the situation of Macao is opposite as percentage of gaming expense from visitors increased dramatically from 66.1% in 2001 to 86.1% in 2014. Although 2015/2016 saw a slight drop in the gaming expense, the total revenue of Macao is relying too much on gaming revenue.

- There are many regional competitors that are already in operation or pending approval in places like Singapore, Malaysia, the Philippines, Korea, Cambodia, Vietnam and Japan.

Source: University of Nevada Las Vegas: “Nevada Casinos: Departmental Revenues, 1984-2016”, 2017; Gaming Inspection and Coordination Bureau; Statistics and Census Services
3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.2 ANALYSIS OF EXISTING CONDITIONS

MICE

- According to the statistics of the International Congress and Convention Association (ICCA), the total number of MICE meetings hosting in Macao has increased over the years, from 2012 to 2016, with an increase in ranking in the Asia Pacific region.

- However, compare to other conference cities in Asia, Macao is still lagging far behind in terms of conference numbers and attendance.

- Compare to other world tourism cities, the majority of conference venues in Macao are located adjacent to casinos. There is a lack of landmark multi-use MICE venue that is government-owned or financially backed, with the Macao East Asian Games Dome as the only option. There are firms that are not permitted to meet or hold conferences in casino-linked properties, which has limited the opportunity of Macao holding more MICE events.

### Table 3.1: Top 10 Asia Pacific & Middle East Rankings: Number of Meetings per City (2016)

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>No. of Meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Singapore</td>
<td>151</td>
</tr>
<tr>
<td>2</td>
<td>Seoul</td>
<td>137</td>
</tr>
<tr>
<td>3</td>
<td>Bangkok</td>
<td>121</td>
</tr>
<tr>
<td>4</td>
<td>Beijing</td>
<td>113</td>
</tr>
<tr>
<td>5</td>
<td>Hong Kong</td>
<td>99</td>
</tr>
<tr>
<td>6</td>
<td>Tokyo</td>
<td>95</td>
</tr>
<tr>
<td>7</td>
<td>Taipei</td>
<td>83</td>
</tr>
<tr>
<td>8</td>
<td>Shanghai</td>
<td>79</td>
</tr>
<tr>
<td>9</td>
<td>Kuala Lumpur</td>
<td>68</td>
</tr>
<tr>
<td>10</td>
<td>Sydney</td>
<td>61</td>
</tr>
</tbody>
</table>

3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.2 ANALYSIS OF EXISTING CONDITIONS

Entertainment and Sports

- Macao has a certain number of worldwide sports competitions and some of them have long history, however, the city still have the potential to introduce more international sports events, which should be actively promoted.

- Although the number of family-oriented entertainment facilities are increasing, marketing campaigns need to be strengthened, and attractive educational and entertainment experiences should be promoted.

- Macao has a certain number of shows which are popular amongst visitors. At the same time, the Macao Government Tourism Office hosts or supports various evening events, like the Parade for the Celebration of Chinese New Year and Parade Float Exhibition, Macao International Fireworks Display Contest, Fireworks Carnival, Oktoberfest, Macao Food Festival, Macao Light Festival, Fireworks during festivities, etc.

- Macao has a number of attractive and interesting events. The existing festivals and events hosted in Macao, such as the Macau Grand Prix, and the Parade through Macao, Latin City, have become representative international events. However, their worldwide popularity and recognition still have potential to be amplified.

- More favourable conditions should be provided to facilitate the hosting of more international mega-competitions and events, such as branding special events like the Biennale in Macao.

Table 3.2: Major Sports Events in Macao (2016)

<table>
<thead>
<tr>
<th>Name of the Event</th>
<th>Since</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wushu Masters Challenge</td>
<td>2016</td>
</tr>
<tr>
<td>The Macao (Golf) Open</td>
<td>1998</td>
</tr>
<tr>
<td>FIVB Volleyball World Grand Prix</td>
<td>1993</td>
</tr>
<tr>
<td>Macao International Dragon Boat Races</td>
<td>1982</td>
</tr>
<tr>
<td>Macau International Marathon</td>
<td>1981</td>
</tr>
<tr>
<td>Macau Grand Prix</td>
<td>1954</td>
</tr>
</tbody>
</table>

Chart 3.10: Residents’ Rating towards Entertainment Options in Macao

(0-4: Not Sufficient, 5: Acceptable, 6-10: Sufficient)

Source: Sports Bureau Official Website; Survey Conducted and Arranged by the Project Team
3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.2 ANALYSIS OF EXISTING CONDITIONS

Cultural Attractions

• Macao possesses UNESCO world cultural heritage (both tangible and intangible) which can be further developed into the iconic tourism products in Macao.

• Cultural assets in Macao could be better operated and marketed. For example, the scale of promotion on the abundant museum resource of Macao could be increased; some heritage buildings could be better maintained and presented to visitors; intangible cultural performance such as Yueju Opera (Cantonese Opera) and Cantonese Naamyam (Narrative Songs) could be better promoted.

• Some of the museums and exhibitions could provide information displays in different languages for visitors, thereby enhancing visitors’ understanding of the exhibitions, as well as raising recognition of the museums and the number of visitors.

• Compared to other tourism cities, Macao lacks a multi-use iconic cultural complex that can showcase the unique cultural diversity of the city.

Source: Printing Bureau
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.2 ANALYSIS OF EXISTING CONDITIONS

Cultural Attractions (Intangible Cultural Heritage)

- The Yueju Opera (Cantonese Opera) has been announced as UNESCO intangible cultural heritage since 2009, it can be further developed and promoted to residents and visitors in Macao.
- Some of the intangible cultural heritages can be introduced to visitors in the future multi-use cultural complex.

<table>
<thead>
<tr>
<th>No.</th>
<th>Name</th>
<th>Macao SAR List</th>
<th>National List</th>
<th>UNESCO List</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yueju Opera (Cantonese Opera)</td>
<td>2006</td>
<td>2006</td>
<td>2009</td>
</tr>
<tr>
<td>2</td>
<td>Herbal Tea</td>
<td>2006</td>
<td>2006</td>
<td>--</td>
</tr>
<tr>
<td>3</td>
<td>Woodwork-Macao Religious Figure Carving</td>
<td>2007</td>
<td>2008</td>
<td>--</td>
</tr>
<tr>
<td>4</td>
<td>Cantonese Naamyam (Narrative Songs)</td>
<td>2009</td>
<td>2011</td>
<td>--</td>
</tr>
<tr>
<td>5</td>
<td>Taoist Ritual Music in Macao</td>
<td>2009</td>
<td>2011</td>
<td>--</td>
</tr>
<tr>
<td>6</td>
<td>Feast of the Drunken Dragon</td>
<td>2009</td>
<td>2011</td>
<td>--</td>
</tr>
<tr>
<td>7</td>
<td>Mazu (A Ma) Belief and Customs</td>
<td>2012</td>
<td>2014</td>
<td>--</td>
</tr>
<tr>
<td>8</td>
<td>Na Tcha Belief and Customs</td>
<td>2012</td>
<td>2014</td>
<td>--</td>
</tr>
<tr>
<td>9</td>
<td>Macanese Gastronomy</td>
<td>2012</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>10</td>
<td>Macanese Theatre (Theatre in Patuá)</td>
<td>2012</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

Source: Cultural Affairs Bureau Official Website
3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.2 ANALYSIS OF EXISTING CONDITIONS

Natural Attractions

- Macao has a number of natural attractions including walking trails, cycling trails, beaches, country parks and nature conservation areas, most of the existing natural attractions are located in the most southern island, Coloane.
- These nature attractions should be re-evaluated and identified for future development as specific ecotourism draws and activities.
- The Macao Giant Panda Pavilion at Seac Pai Van Park, aimed at raising awareness about the importance of conservation and environmental protection, is one of the recent ecotourism development in Macao which opened since 2011 and have potential to be upgraded into a more attractive and popular tourist attraction.

Table 3.4: Major Natural Attractions in Macao

<table>
<thead>
<tr>
<th>Walking Trails</th>
<th>Cycling Trails</th>
<th>Beaches</th>
<th>Country Parks</th>
<th>Nature Conservation Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trail at Mong-Ha Hill (1.0 km)</td>
<td>Lotus Cycling Track (1.3 km)</td>
<td>Hac-Sa Beach: Southeastern part of Coloane Island, 1.35 km long, Macao's largest and most popular beach, a place for various water activities.</td>
<td>Taipa Grande Nature Park (62.7 ha)</td>
<td>Simulation of the Ecological Zone of Alto de Coloane (3,000 sqm)</td>
</tr>
<tr>
<td>Trail at Guia Hill (1.2 km)</td>
<td>Leisure Area of Taipa Waterfront (2.0 km)</td>
<td>Cheoc Van Beach: Southern part of Coloane Island, 0.3 km long, a relatively smaller beach.</td>
<td>Seac Pai Van Park (including the Macao Giant Panda Pavilion 19.8 ha)</td>
<td>Ká-Hó Reservoir Freshwater-Wetland Ecological Zone (2,582 sqm)</td>
</tr>
<tr>
<td>Grand Taipa Hiking Trail (4.0 km)</td>
<td></td>
<td></td>
<td>Hac-Sa Reservoir Country Park (81.8 ha)</td>
<td>Baia de Nossa Senhora da Esperança Wetland Ecological Viewing Zone (4,500 sqm)</td>
</tr>
<tr>
<td>Small Taipa 2000 Circuit (2.3 km)</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Coloane Trail (8.1 km)</td>
<td></td>
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</tr>
<tr>
<td>Coloane Fitness Walk (1.2 km)</td>
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<tr>
<td>Seac Min Pun Ancient Path (1.5 km)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Coloane North-east Hiking Trail Network (4.3 km)</td>
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<tr>
<td>Hac-Sa Reservoir Family Walk (2.7 km)</td>
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<tr>
<td>Hac-Sa Reservoir Fitness Walk (1.5 km)</td>
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<tr>
<td>Long Chao Kok Coastal Trail (1.2 km)</td>
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<tr>
<td>Morro de Hac-Sa Family Trail (2.2 km)</td>
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<tr>
<td>Ka-Ho Height Family Trail (1.5 km)</td>
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<tr>
<td>Ka-Ho Reservoir Lakeside Walk (1.6 km)</td>
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<td>Park Walk of Seac Pai Van Park (1.7 km)</td>
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</tbody>
</table>

Source: Project Team
3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.2 ANALYSIS OF EXISTING CONDITIONS

Natural Attractions (cont.)

- The Central Government defined maritime areas to be placed under Macao’s management in 2015. The waterfront areas should be leveraged to develop dynamic and attractive water activities, such as yacht tourism and harbour sightseeing.
- However, the depth of water has limited Macao to accommodate only yachts and small boats, but not large cruises.

Figure 3.4: Macao’s New Land Boundaries and Defined Maritime Areas Placed under Macao’s Management

3. TOURISM RESOURCES AND PRODUCTS SYSTEM

3.3 SCENARIO ASSESSMENT

- Macao has world-class and unique heritage, culture and integrated resorts, but compare to other leading tourism cities, there is a gap in large cultural attractions, MICE facilities, family attractions, diversity in accommodations and retail offerings.
- Macao attractions are highly clustered resulting in overcrowding.
- The defined maritime areas and new reclamation areas present great opportunities for development.

- Macao needs to expand and diversify tourism products.
  - Consider new iconic and unique attractions away from the core areas.
  - Macao should encourage the development of diverse accommodations and retail.
  - Macao should encourage development of marine areas.

- The public is concerned with over reliance on gaming.
  - Crowdedness during holidays is a major concern.
  - The public wants to emphasise Macao’s unique European and Chinese culture.
  - Family attractions are needed but a large scale theme park may not be suitable.
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.4 KEY OBJECTIVE AND STRATEGIES

The key objective is to **diversify tourism products and experiences**. The goals of this objective are to extend the average length of stay of overnight stay visitors; to rebuild the image of Macao from a gaming city to a world-class, diverse, tourism destination; to further promote sustainable tourism in the future; and to improve the residents’ quality of life. Through exploring the cultural resources of Macao, to introduce diversified tourism products and experiences which drives the leisure atmosphere in Macao.

This key objective will be realised by the implementation of four key strategies:

- **Introduce New Tourism Elements**: the defined maritime areas and the future reclamation areas are considered unique opportunities for Macao to introduce new tourism elements such as marine tourism products and vibrant waterfront environments.

- **Develop Iconic Tourism Products**: it is important for Macao to be exceptional in its own way - to stand out from other tourist destinations by developing iconic tourism products. This can include a physical development of tourism facilities, or introducing distinctive and unique events and festivals that are considered to be highly original and uniquely Macao.

- **Enrich Visitors’ Experience**: a key implementation strategy to diversify tourism products is to enrich visitors’ experiences through cultural programmes and classes, educational tours and smart tourism.

- **Expand Tourism Related Offerings**: to diversify tourism products requires an alignment with a wide range of market segments; therefore, one effective approach will be to attract worldwide visitors by offering varied tourism accommodation and retail options to encourage visitors to stay longer in Macao.
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.4 KEY OBJECTIVE AND STRATEGIES
3.4.1 STRATEGY 1: INTRODUCE NEW TOURISM ELEMENTS

Introduction of new tourism elements will potentially occur in two areas: the defined maritime areas, and the future new reclamation areas.

The defined maritime areas has provided a strong foundation for Macao to develop marine tourism related leisure facilities and recreational activities. Ensuring an impressive skyline is important to a city. To achieve successful marine activity development, allowing visitors to look out from their water transport vehicles, there is a need to develop cruise sightseeing tours in the near future; this will also help strengthen the image of Macao. Furthermore, yacht tourism has already been actively developed in Macao. The key improvement to further promote yacht tourism is to stimulate regional ties, to propose application details in terms of sailing safety, water area condition, maritime infrastructures such as locations of berth, immigration, customs examinations, practical travel information and development of related policy.

The future new reclamation areas will provide opportunity to bring a diversity of new tourism elements to Macao. The development of waterfront environment is considered as one of the most sustainable opportunities, to create quality waterfront environment offering sufficient public leisure and open space for residents and visitors will be a win-win solution for Macao to achieve the vision of “World Centre of Tourism and Leisure”. In addition, there can be other tourism-related benefits such as the creation of a major sightseeing point, together with marine tourism to further develop international water events and festivals.

Image Source: Macao Government Tourism Office
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.4 KEY OBJECTIVE AND STRATEGIES
3.4.2 STRATEGY 2: DEVELOP ICONIC TOURISM PRODUCTS

To be iconic is to be widely recognised and well-established, and to be widely known and acknowledged especially for distinctive excellence. Macao does have a unique blend and contrast of European and Chinese culture, which is a great asset to be further introduced into tourism development.

One of the key strategies is to be iconic in terms of architecture. Macao has to continue to preserve its unique architecture style, to further promote its iconic tourism through the architectural code. To extend this strategy, there are future opportunities to use the waterfront environment at new town areas to construct a landmark cultural structure; and together with the impressive skylines, be the future gateway of Macao.

In addition to building up unique architecture style, it will also be an opportunity to expand event offerings to host regularly scheduled events, which will in turn provide continuous drivers of Macao’s positioning as a “World Centre of Tourism and Leisure”. The events shall consider the distinctive and unique Macanese culture, which can showcase Macao’s unique attractiveness.

With the development of either iconic architecture or events, the key strategies will concentrate on the following elements:

• Develop cultural facilities and events uniquely in Macao
• Increase and upgrade family-oriented entertainment
• Introduce international sports tourism to attract worldwide participation
• Encourage residents’ engagement to the present uniqueness of Macao tourism.

Image Source: Macao Government Tourism Office
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.4 KEY OBJECTIVE AND STRATEGIES
3.4.3 STRATEGY 3: ENRICH VISITORS’ EXPERIENCE

Enriching the visitors’ experience refers to the development of tourism activities and programmes, which can be done through the following key strategies:

- Upgrade and expand smart tourism technology applications to current tourist attractions. For example, use augmented reality (AR) technology to enhance information displays and understanding.
- Create interactive tourism programmes for visitors. For example, family educational/entertainment programmes for museums, eco-tourism tours, learning courses and workshops such as cooking classes.
- Regularly host attractive events and festivals for visitors to participate.
- Increase nighttime activities and programmes to enrich visitors’ evening entertainment options.
- Continually establish various interesting activities such as rooftop bars, cruise parties and dining, etc.
- Encourage the innovation of tourism products and services present Macao’s unique tourism elements to visitors.

*Image Source: Macao Government Tourism Office*
To diversify tourism products requires an alignment with a diversity of market segments. A key strategy will be to attract worldwide visitors by offering a wide and varied nature of tourism products. This includes cultural, retail, leisure and business, accommodation, dining, and entertainment.

To produce a greater variety of tourism offerings, Macao should prioritise re-balancing hotel options by developing more 2- and 3-star hotels and guesthouses. While the development of 2- and 3- star hotels may seem counterintuitive to the recommended strategy for Macao to target the “high-value market”, this is not so. There is a segment of the market that prefers more basic accommodation but willing to spend more on experiences, retail and dining. The 2- to 3- star hotels refer to the level of facilities the hotels provide, not necessarily the price. The 3- star hotels can be very profitable and are important to the overall mix. Approaches to facilitate development of 2- and 3- star hotels should be encouraged. Having a larger spectrum of accommodation options will allow the city to better meet the requirements of various overnight stay visitors, thus encouraging them to extend their length of stay.

Additionally, with a limited diversity of shopping items but a large number of high-end luxury retail shops in town, there is further opportunity to expand Macao’s retail offerings. The key strategy will be to diversify shopping categories from high-end to localised products; introduce boutique shops, develop locally branded products, and possibly construct an independent mixed-use shopping centre at the new town area in future. Diversifying retail offerings is also a significant way to support traditional small- and medium-sized industries and businesses in Macao.

*Image Source: Macao Government Tourism Office*
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.5 PLANNING PROPOSALS AND ACTION PLANS

The four strategies are conceptual ideas which achieve the key objective as to **diversify tourism products and experiences**. The four planning proposals are specific implementations, supported by short-, medium-, and long-term action plans.

**Introduce Marine Tourism Products:** as a coastal city, the defined maritime areas provides substantial opportunity for Macao to introduce marine tourism attractions.

**Develop Iconic Tourism Facilities:** this can include physical development of facilities, current existing tourism facilities can be optimised, iconic landmark tourist attractions can be introduced to future new town areas to strengthen the city’s unique image.

**Richer Iconic Tourism Events and Experiences:** developing iconic tourism can also mean introducing distinctive and unique events, activities, and festivals to create rich visitor experiences and extend their length of stay.

To build either iconic facilities or to create richer events and experiences, the development plan will include the following four key elements:

1. Highlight the unique blend and contrast of European and Chinese culture; build off the uniqueness of Macao’s history and culture.
2. Promote and increase family-oriented tourism products.
3. Host international sports competitions and other events to promote the city’s reputation and attract worldwide visitors.
4. Encourage the development of resident engagement programmes.

**Expand Hotel and Retail Offerings:** rebalance accommodation options to extend the length of stay of overnight stay visitors. In addition, apart from providing a large number of high-end luxury retail, Macao has room to broaden its retail offerings by, for example, introducing more boutique/specialty shops.
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>Planning Proposals</th>
<th>LAYING THE FOUNDATIONS: Short-Term (0 to 5 years)</th>
<th>FACILITATING PRODUCTIVITY AND EFFICIENCY: Medium-Term (6 to 10 years)</th>
<th>ACHIEVING SUSTAINABLE TOURISM GROWTH: Long-Term (above 10 years)</th>
</tr>
</thead>
</table>
| **P 1.1** Introduce Marine Tourism Products | • P 1.1.1 Support the development of water sightseeing programmes  
• P 1.1.2 Support boat-related entertainment projects  
• P 1.1.3 Continually develop more water sports | • P 1.1.4 Upgrade and optimise the facilities for yacht tourism  
• P 1.1.5 Continually encourage and assist to promote international water sports events and festivals | • P 1.1.6 Develop Macao to be the core city of short-haul multi-destination trips in the Pearl River Delta through the comprehensive development of marine tourism products |
| **P 1.2** Develop Iconic Tourism Facilities | • P 1.2.1 Upgrade and expand the Grand Prix Museum and revitalise the Wine Museum  
• P 1.2.2 Continually develop family “edutainment” facilities | • P 1.2.3 Facilitate the development of a theme park with distinctive features  
• P 1.2.4 Integrate and utilise the existing facilities on the development of a multi-use MICE complex | • P 1.2.5 Develop an iconic cultural district in the new reclamation area |
| **P 1.3** Richer Iconic Tourism Events and Experiences | • P 1.3.1 Add more night activities and programmes  
• P 1.3.2 Host Macao’s unique cultural performances and festivals  
• P 1.3.3 Introduce smart tourism technology applications to current attractions  
• P 1.3.4 Encourage local communities and private businesses to create new tourism experiences  
• P 1.3.5 Expand local food and wine culture  
• P 1.3.6 Mega event planning of “Macao Tourism Week” | • P 1.3.7 Increase family edutainment experiences and events  
• P 1.3.8 Continually roll out interesting activities | |
| **P 1.4** Expand Hotel and Retail Offerings | • P 1.4.1 Continually encourage the development of more diversified accommodation options  
• P 1.4.2 Continually encourage the introduction of local branded retail and boutique shops | • P 1.4.3 Encourage the development of a shopping complex in the new reclamation area | |
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM
#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

**P 1.1 Introduce Marine Tourism Products | Short-Term Action Plans**

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
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</thead>
<tbody>
<tr>
<td></td>
<td><strong>P 1.1.1 Support the development of water sightseeing programmes</strong></td>
<td>• Support various forms of water sightseeing projects in Macao.</td>
<td>• Support the development of water sightseeing tours routing around Macao Peninsular, Taipa and Coloane.</td>
<td>Maritime and Water Area</td>
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<tr>
<td></td>
<td></td>
<td>• Support and introduce both land-based and water-based sightseeing tourism programmes, allowing visitors to experience the cultures and history of Macao from different perspectives while enriching the leisure experience of local residents.</td>
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<tr>
<td></td>
<td><strong>P 1.1.2 Support boat-related entertainment projects</strong></td>
<td>• Introduce boat tours or other boat-related entertainment to further develop marine tourism and showcase the unique city image of Macao.</td>
<td>• Facilitate and enrich boat-related entertainment programmes in Macao, such as the showcasing of traditional fishing boats.</td>
<td>Maritime and Water Area</td>
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<td></td>
<td></td>
<td>• Explore other potential on-board activities (such as dining and partying, etc.)</td>
<td>• Formulate relevant laws or regulations.</td>
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</table>
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM
#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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<tr>
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<tbody>
<tr>
<td>P 1.1.3</td>
<td>Continually develop more water sports</td>
<td>• Develop water sport activities to the assigned water boundary area, to enrich visitors’ experiences and enhance the recreational options for local residents.</td>
<td>• Identify the type of water sports that can be implemented within Macao’s water administrative zone, these activities shall be approved by relative government departments. • Identify the locations for water sports and the corresponding supporting facilities.</td>
<td>Sports Area</td>
</tr>
</tbody>
</table>
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

**P 1.1 Introduce Marine Tourism Products | Medium-Term Action Plans**

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
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</thead>
<tbody>
<tr>
<td>P 1.1.4</td>
<td>Upgrade and optimise the facilities for yacht tourism</td>
<td>• Further optimise the hardware facility provision to the yacht tourism in Macao.</td>
<td>• Construct long-standing berths, border facilities and other supporting provisions, and introduce new yacht mooring areas. By enhancing the standard of appearance, comfort and convenience of facilities to attract more yachts coming to Macao.&lt;br&gt;• The actual implementation and management regarding marine use will follow the “Law for the Management of Maritime Areas”.</td>
<td>Maritime and Water Area</td>
</tr>
<tr>
<td>1.1.5</td>
<td>Continually encourage and assist to promote international water sports events and festivals</td>
<td>• Continually support and encourage intended water sport organisers to have more water sport events and festivals in Macao.</td>
<td>• Provide supports to organisers on organising international water sport events, and facilitate the success of the events.</td>
<td>Sports Area</td>
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</table>
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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<th>No.</th>
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</table>
| P 1.1.6 | **Develop Macao to be the core city of short-haul multi-destination trips in the Pearl River Delta through the comprehensive development of marine tourism products** | • Through marine tourism, develop Macao into a core city of short-haul “multi-destination” travel in the Pearl River Delta Region, and provide convenient access for international visitors to visit nearby cities. | • Promote convenient visa policy and application for yacht travelers to come to Macao and China.  
• Continue and expand the cooperation with nearby cities to develop island tours, such as yacht cruising tours within Pearl River Delta Region. | Macao SAR Government                   |
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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<tr>
<td>P 1.2.1</td>
<td>Upgrade and expand the Grand Prix Museum and revitalise the Wine Museum</td>
<td>• Upgrade and expand the Grand Prix Museum.</td>
<td>• Upgrade and expand the Grand Prix Museum by enhancing the facilities and introducing more interactive activities to enrich travel experience.</td>
<td>Tourism Area</td>
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<td></td>
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<td>• Revitalise the Wine Museum.</td>
<td>• Revitalise the Wine Museum with innovative presentation on wine cultures.</td>
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<td>Continually develop family “edutainment” facilities</td>
<td>• Target family market and introduce “edutainment” tourism products.</td>
<td>• Learn from worldwide, successful experiences and identify the family “edutainment” tourism products that Macao needs.</td>
<td>Tourism and Education Areas</td>
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<td>• Enrich the family facilities in the education center, such as family play zone and reading room.</td>
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### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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<tbody>
<tr>
<td>P 1.2.3</td>
<td>Facilitate the development of a theme park with distinctive features</td>
<td>• Through the construction of supporting the tourism facilities, promote the development of a theme park and attract different types of visitors.</td>
<td>• Determine the appropriate measures and requirements of developing a theme park such as: theme, concept and scale.</td>
<td>Macao SAR Government</td>
</tr>
<tr>
<td>P 1.2.4</td>
<td>Integrate and utilise the existing facilities on the development of a multi-use MICE complex</td>
<td>• Evaluate the existing government-owned tourism and MICE facilities, and develop a multi-use MICE complex.</td>
<td>• Review and evaluate the existing and developing government-owned facilities, such as the Macao East Asian Games Dome and the complex to support trade and economic cooperation between China and Portuguese-speaking countries, etc. and develop a multi-use MICE complex.</td>
<td>Macao SAR Government</td>
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### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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| P 1.2.5 | Develop an iconic cultural district in the new reclamation area | • Construct an iconic cultural district with unique landmark, incorporating with other public amenities and spaces, such as waterfront green areas and park, to showcase a unique city image and provide a brand new recreational area to visitors and residents. | • Start the preparation of the “plan of urban condition” upon the foundation of the “New Reclamation Areas Master Plan”.  
• Based on the “plan of urban condition”, commence the initial construction in the medium run. Finish the construction work in the long run and open to public.  
• The iconic cultural district should have following functions:  
1) Exhibition hall which can display both modern arts and traditional arts, space for hosting global traveling art exhibitions, as well as local art exhibitions, Macao historic cultural exhibitions, Macao photography exhibitions and digital arts exhibitions. The venue also shall include gallery, creative boutique shops and food and beverage service;  
2) Opera house, concert hall and theater which can host famous opera performances, international concerts, international film festivals and various cultural performances;  
3) Small-scale interactive cultural and art workshops can have more family “edutainment” concepts;  
4) Cultural and arts centre which has public green spaces for public arts, such as street performances and interactive performance programme;  
5) Opportunity to develop a Maritime Museum that pertains to Macao’s history as a trading port linking the East and West over 400 years of maritime history;  
6) Supporting facilities such as waterfront dining, boutique retail shops;  
7) Knowledgeable interpreters who are professionals in the areas of Chinese and Portuguese culture. | Planning and Culture Areas |
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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</table>
| P 1.3.1 | Add more night activities and programmes | • Add more interactive night entertainment and leisure programmes; introduce smart tourism technology to enrich night experience in Macao. | • Conduct a benchmark study on nighttime entertainment experiences worldwide.  
• Add more interactive night entertainment and leisure programmes with quality enhancement. Introduce new elements to the existing programmes, optimise and develop the existing nighttime events into some iconic tourism activities. Introduce smart tourism technology to enrich visitors’ experiences. | Tourism Area |
| P 1.3.2 | Host Macao’s unique cultural performances and festivals | • Continual hosting of cultural performances and festivals, showcasing the authentic landscape of Macao, and the unique blend of European and Chinese cultures. | • Showcase the traditional Portuguese and Macanese cultures, such as the music genre Fado, the Patuá and input more marketing efforts to make it an iconic cultural event in Macao.  
• Highlight the unique blend and contrast of European and Chinese culture, to host well-known special events.  
• Continual participation in regional cultural events and festivals. | Culture Area |
| P 1.3.3 | Introduce smart tourism technology applications to current attractions | • Introduce smart tourism technology applications and augmented reality to current attractions such as Historic Centre of Macao and small-scale museums. | • Develop the content and install smart tourism and augmented reality technology applications to current historic attractions and small museums, and expand to the historic district to enrich visitors’ travel experience.  
• Introduce smart tourism technology applications to cultural attractions and museums is not only to enrich visitors’ experience but also to increase information channels and spread Macao history and culture.  
• Promote “Lou Kau Mansion” electronic guided service to other cultural attractions and museums, learn from it and develop more new technology. | Culture Area |
### P 1.3 Richer Iconic Tourism Events and Experiences | Short-Term Action Plans

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</table>
| P 1.3.4 | Encourage local communities and private businesses to create new tourism experiences | • Encourage local residents, community associations, and local businesses to get involved in Macao’s tourism industry and create new tourism experiences. | • The “Macao Awareness Campaign” is the priority action which needs to continue with in-depth development, to help residents to further understand and familiarise themselves with tourism industry development.  
• Strengthen the promotion of “Community Tourism Development Plan”, encourage local associations and SME to organise community culture, history, and other tourism-related experiences such as cultural programmes and classes, educational tours, and storytelling. | Tourism Area |
| P 1.3.5 | Expand local food and wine culture | • Promote local food and wine culture and put in more marketing effort to promote Macau Food Festival, to extend visitors’ length of stay and transform Macao into a City of Gastronomy in Asia. | • Prioritise the promotion and transmission of Macao local food, such as the Macanese cuisine and promote with the unique gastronomy.  
• Organise International Gastronomy Forum to facilitate the experience sharing and exchange and promote sustainable development of local food industry.  
• Input more marketing effort to Macau Food Festival.  
• Introduce activities relate to wine culture.  
• Provide small-scale cooking classes conducted by local chefs and promote to visitors.  
• Encourage and support local associations to organise move activities themed as “Local Gastronomy” or “Macao’s Traditional/Unique Gastronomy”. | Tourism Area |
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM
#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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</table>
| P 1.3.6 | Mega event planning of “Macao Tourism Week” | • To enhance the "synergistic effect" and develop the all inclusive “Macao Tourism Week” mega event.  
• To attract more MICE groups and generate more off-season tourism demands. | • Evaluate the existing tourism events, such as Macao International Marathon, Parade through Macao, Latin City, International Film Festival & Awards • Macao, and Macao Shopping Festival. Identify the potential events which can be combined together as a "Macao Tourism Week" to have the "synergistic effect".  
• Identify the nature of events and integrate the competitive resources for developing into a mega events, enhancing the linkage effect, helping to attract leisure visitors and MICE groups and generate off-season demands. | Tourism Area        |
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM

#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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</table>
| P 1.3.7 | Increase family edutainment experiences and events | • Introduce more family “edutainment” experiences and events. The city can upgrade current facilities, introduce high-technology, have outdoor shows, conduct indoor workshops, increase night family entertainments and provide interactive edutainment programmes. | • Provide educational programmes in museums, help next generations learn more about Macao’s history and culture.  
  • Moderately expand or upgrade the current museum facilities, create opportunity to introduce high-tech concepts, and provide more attractive activities.  
  • Introduce more school holiday events, or weekend programmes to current attractions.  
  • Organise more family workshops such as Macanese cooking lessons, Macao history painting classes, ecotourism tours, Macao cultural competition for local preteens and teens, science workshops.  
  • Optimise the quality of activities, introduce new elements to the existing nighttime activities  
  • Introduce interactive media devices to education centres, such as VR devices, providing a more diversified learning experiences to family visitors. | Tourism and Education Areas |
### 3. TOURISM RESOURCES AND PRODUCTS SYSTEM
#### 3.5 PLANNING PROPOSALS AND ACTION PLANS

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</table>
| P 1.3.8 | Continually roll out interesting activities               | • Support the launching of interesting activities, maintain Macao’s image as a vibrant tourism city. | • Facilitate the development of iconic leisure and tourism offerings.  
• Support the seasonal celebration activities and themed performances through a supportive programme.  
• Encourage innovative tourism products and services, including:  
  1) Dining in the sky  
  2) Marine tourism products such as Dining on the Sea and boat parties | Tourism Area |

3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.5 PLANNING PROPOSALS AND ACTION PLANS

### P 1.4 Expand Hotel and Retail Offerings | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 1.4.1 | Continually encourage the development of more diversified accommodation options | • Continual encouraging potential developers to build more budget accommodations.       | • Identify the potential site areas for development of specific accommodations. The potential sites can be redevelopment areas and new reclamation areas.  
• Encourage to develop unique accommodations, such as small-scale boutique hotels, and youth-and family oriented lodges to attract a diversified market. | Macao SAR Government                  |
| P 1.4.2 | Continually encourage the introduction of local branded retail and boutique shops | • Encourage potential developers to build more local branded retail shops and boutique shops. | • Continue developing current cultural and creative streets in St. Lazarus Parish area.  
• Encourage to develop more boutique shops and integrate with small scale cultural and creative exhibitions.  
• Encourage younger generations to create locally designed and crafted arts and wares, and further develop local brands, and open boutique shops.  
• Encourage residents who have skills in designing and making local products (either food or art craft) to conduct workshops.  
• Encourage local creative industry in developing distinctive cultural projects, including creative designs, cultural performance and digital products. | Tourism and Culture Areas             |
3. TOURISM RESOURCES AND PRODUCTS SYSTEM
3.5 PLANNING PROPOSALS AND ACTION PLANS

P 1.4 | Expand Hotel and Retail Offerings | Medium-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 1.4.3 | Encourage the development of a shopping complex in the new reclamation area     | • Encourage the construction of a large-scale, independent, mixed-use shopping centre in the new reclamation area                                                                                                        | • Identify the location of the shopping centre to have seamless connectivity to border and light railway stations, for greater consumer convenience.  
• The shopping centre can include the following major elements:  
1) Diverse shopping categories from high-end shops to department stores and wholesale discounted shops;  
2) A wide range of dining options, including casual and fine dining, fast food, cafes, food courts, and vegetarian restaurants;  
3) Entertainment facilities such as an ice skating rink, branded cinemas, small-scale family entertainment;  
4) Provide activity spaces, organise seasonal events to attract special markets during certain seasons to attract particular markets. | Macao SAR Government  |
CHAPTER 4
TOURISM QUALITY AND SERVICE SYSTEM
4. TOURISM QUALITY AND SERVICE SYSTEM

4.1 INTRODUCTION

To achieve the city’s vision of becoming a “World Centre of Tourism and Leisure”, the tourism industry must focus on the continual improvement of tourism quality and services.

To become a “World Centre of Tourism and Leisure“ means not only offering outstanding development of the tourism and leisure industry, but also ensuring the delivery of a high standard of service. Furthermore, ongoing training provision and continuous management of the tourism industry are critical factors in upgrading the overall quality of service and helping the industry to reach an international standard.

The key strategies for improving tourism service delivery and quality assurance are presented in this chapter. These strategies are underpinned by the baseline assessment of the tourism quality and service system, lessons from successful experiences of other world-class tourist destinations, and input from the public consultation.

The planning proposals in this chapter emphasise the continuous improvement of tourism quality and services. Findings and issues relating to physical improvements and structural issues that require policy changes and industry cooperation are presented in other chapters in this Report.

The planning proposals focus on how to improve tourism service delivery and quality assurance in the future. Each planning proposal is supported by short and medium term action plans, with content covering the following:

This chapter includes the following:
4.1 Introduction
4.2 Analysis of Existing Conditions
4.3 Scenario Assessment
4.4 Key Objective and Strategies
4.5 Planning Proposals and Action Plans
### 4. TOURISM QUALITY AND SERVICE SYSTEM

#### 4.2 ANALYSIS OF EXISTING CONDITIONS

#### 4.2.1 EXISTING CONDITIONS OF TOURISM SERVICE DELIVERY AND QUALITY ASSURANCE

| Significance of Integrated Quality Tourism Service | • Quality tourism is key to a destination’s success. Although Macao provides a range of tourism products for visitors, competition from rival cities in the vicinity combined with the globalisation of tourism have resulted in considerable external pressure on the city. Macao, therefore, needs to further improve its service quality and market awareness to sustain its competitiveness in the region.  
• As the City’s goal is to become a “World Centre of Tourism and Leisure”, Macao's tourism services delivery and quality assurance system should integrate various aspects of the industry to achieve tourist satisfaction throughout the visitor experience, from pre-arrival and arrival up to departure, namely customs clearance, transportation, lodging, food and beverage, entertainment and so on. Hardware, software and environment are the three key dimensions to consider in the development of quality tourism services. |
| Significance of Human Resources | • Human resources are the core enabler for sustainable growth in the tourism industry. However, given Macao’s limited local human resources, the City relies heavily on non-resident workers in the hotel and F&B sectors. The majority of non-resident workers are from Mainland China and are employed at the frontline. Their proficiency in Mandarin makes them workers of choice as the current tourism market is predominantly from Mainland China. Diversification of the tourism market would require a strategy for training and upgrading the language skills of frontline service workers.  
• Self-service technologies may offer a potential solution towards less labour intensive service systems in some of the industry’s service sectors.  
• There is a potential need to create a one-stop online platform to provide and share relevant supporting tools and guidance to educate and train workers to update their skills and knowledge. |
4. TOURISM QUALITY AND SERVICE SYSTEM

4.2 ANALYSIS OF EXISTING CONDITIONS

4.2.1 EXISTING CONDITIONS OF TOURISM SERVICE DELIVERY AND QUALITY ASSURANCE

<table>
<thead>
<tr>
<th>Visitors Overall Experience in Macao</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Findings from the “Macao Tourism Quality and Service Survey” conducted in October of 2015 and February of 2016 indicate that the majority of return visitors are individuals who come to Macao for shopping, sight-seeing and leisure. Their overall experience in Macao was satisfactory and scored at a medium to high level.</td>
<td></td>
</tr>
</tbody>
</table>

Visitors characteristics
Findings from the surveys conducted in both October of 2015 and February 2016 indicate that the majority of the surveyed visitors are “Return Visitors” rated 78.6% of the total, and 44.6% are “Same Day Visitors”. In February 2016, about 79.6% are “Return Visitors”, and 47.4% are “Same Day Visitors”.

Visitors’ Satisfaction on Macao Tourism Quality and Service

The findings of the two surveys in all aspects are relatively similar between 2015 and 2016. The majority of the surveyed visitors are mostly satisfied with “sight-seeing & tourist attractions”, “hotels and accommodations” and “immigration and entry port”, their overall scores are 4.03, 4.04 and 4.02 in 2015 and 4.00, 3.97 and 3.94 in 2016. While, in both surveys, surveyed tourists rated the least satisfactory in “transportation” in their overall travel experience, scored 3.66 both in 2015 and 2016. Visitors’ overall experience in “sight-seeing & tourist attractions” rated the highest, where with high scoring in the “security of tourist attractions” (2015 scored 4.19, 2016 scored 4.09), follow by “cleanliness” (2015 scored 4.10, 2016 scored 3.97 and for “clarity of signage” (2015 scored 3.97, 2016 scored 3.94). However, with the least satisfactory in “crowdedness in tourist attractions” scored 3.26 in 2015, scored 3.00 in 2016 respectively.

Table 4.1: Comparison Visitors’ Satisfaction on Macao Tourism Quality and Service (2015 & 2016)

<table>
<thead>
<tr>
<th>Overall Satisfaction Level (Scoring 1-5 ) 1 as the least satisfactory and 5 as the most satisfactory</th>
<th>Oct 2015</th>
<th>Feb 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondent</td>
<td>Satisfaction</td>
<td>Respondent</td>
</tr>
<tr>
<td>1</td>
<td>Overall experience in sight-seeing &amp; tourist attractions</td>
<td>460</td>
</tr>
<tr>
<td>2</td>
<td>Overall experience in hotels &amp; accommodations</td>
<td>341</td>
</tr>
<tr>
<td>3</td>
<td>Overall experience in immigrations and entry ports</td>
<td>495</td>
</tr>
<tr>
<td>4</td>
<td>Overall experience in catering and restaurants</td>
<td>477</td>
</tr>
<tr>
<td>5</td>
<td>Overall experience in shopping</td>
<td>472</td>
</tr>
<tr>
<td>6</td>
<td>Overall experience in transportation</td>
<td>485</td>
</tr>
</tbody>
</table>

Source: Project Team
4. TOURISM QUALITY AND SERVICE SYSTEM

4.2 ANALYSIS OF EXISTING CONDITIONS

4.2.1 EXISTING CONDITIONS OF TOURISM SERVICE DELIVERY AND QUALITY ASSURANCE

- According to the 2015 and 2016 statistics provided by the Macao Government Tourism Office (MGTO), gaming, transport and illegal accommodation are the top three areas of complaints, and in 2016 there is dramatic increase of complaints in gaming.

Table 4.2: An Overview of Complaints from Visitors Received by MGTO (2015 and 2016)

<table>
<thead>
<tr>
<th>Category</th>
<th>Mainland China</th>
<th>Hong Kong</th>
<th>Taiwan</th>
<th>South East Asia</th>
<th>Others</th>
<th>Total</th>
<th>2015-2016 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Illegal Accommodation</td>
<td>99</td>
<td>120</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Shopping</td>
<td>22</td>
<td>28</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Hotel</td>
<td>49</td>
<td>38</td>
<td>21</td>
<td>21</td>
<td>4</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Travel Agency</td>
<td>4</td>
<td>8</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Tour Guide</td>
<td>64</td>
<td>86</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sauna</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Nightclub/Bar/Karaoke</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Public Entity</td>
<td>5</td>
<td>8</td>
<td>15</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>F&amp;B/Restaurant</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td>11</td>
<td>7</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Transport</td>
<td>130</td>
<td>88</td>
<td>38</td>
<td>28</td>
<td>19</td>
<td>8</td>
<td>14</td>
</tr>
<tr>
<td>Gaming</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Fraud</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Others</td>
<td>15</td>
<td>15</td>
<td>8</td>
<td>6</td>
<td>5</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>403</td>
<td>406</td>
<td>101</td>
<td>81</td>
<td>42</td>
<td>20</td>
<td>23</td>
</tr>
</tbody>
</table>

Source: Macao Government Tourism Office
4. TOURISM QUALITY AND SERVICE SYSTEM

4.2 ANALYSIS OF EXISTING CONDITIONS

4.2.1 EXISTING CONDITIONS OF TOURISM SERVICE DELIVERY AND QUALITY ASSURANCE

Resident's view on Macao Tourism Development

The resident satisfaction telephone survey was conducted in 31 July – 1 August, 2015. The main survey topics are resident’s evaluation on living conditions and on tourism carrying capacity. Residents' opinions and expectations are collected and grouped into 8 major topics, including: transport, tourism capacity, supporting facilities, tourism elements, sanitation, service quality, consumer price and marketing. The table below shows the overview of the three items with the highest and lowest scores in the evaluation of the residents’ view on the living environment and the carrying capacity in the overall survey. In the overall findings, residents’ satisfaction level is particularly low in the overall transport environment and with high concern about inflation on local consumer goods. Above all, transport is under most concern, where the majority of the residents expressed that there are crowdedness with cars and people, roads are always under construction and residents found it difficult to ride on public transportation.

Table 4.3: The Overall Survey Results of the Residents’ View on the Living Environment and Tourism Carrying Capacity

<table>
<thead>
<tr>
<th>Main Topics of the Resident Satisfaction Telephone Survey</th>
<th>Residents’ Evaluation on Living Conditions (among 16 items with the highest and lowest scored items)</th>
<th>Residents’ Evaluation on Tourism Carry Capacity (among 11 items with the highest and lowest scored item)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Scoring System 0-10 (0 is unsatisfactory, 5 is average, 10 is very satisfactory)</td>
<td>Scoring System 0-10 (0 is unsatisfactory, 5 is average, 10 is very satisfactory)</td>
</tr>
<tr>
<td></td>
<td>Item</td>
<td>Score</td>
</tr>
<tr>
<td>Items with the lowest scores</td>
<td>Current overall transportation situation in Macao</td>
<td>3.27</td>
</tr>
<tr>
<td></td>
<td>Macao current consumer price</td>
<td>3.79</td>
</tr>
<tr>
<td></td>
<td>Macao current driving environment</td>
<td>3.88</td>
</tr>
<tr>
<td>Items with the highest scores</td>
<td>Residents’ job opportunities</td>
<td>6.49</td>
</tr>
<tr>
<td></td>
<td>Residents hospitable towards tourists</td>
<td>6.66</td>
</tr>
<tr>
<td></td>
<td>Catering choices available in Macao</td>
<td>6.70</td>
</tr>
</tbody>
</table>

Source: Project Team
4. TOURISM QUALITY AND SERVICE SYSTEM

4.2 ANALYSIS OF EXISTING CONDITIONS

4.2.1 EXISTING CONDITIONS OF TOURISM SERVICE DELIVERY AND QUALITY ASSURANCE

<table>
<thead>
<tr>
<th>Macao Current Quality Accreditation &amp; Awards</th>
</tr>
</thead>
<tbody>
<tr>
<td>• There are some tourism-related service accreditation and awards commended by both the government and the industry in Macao.</td>
</tr>
</tbody>
</table>

Summary of Current Tourism-related Awards/ Recognition in Macao

Tourism awards is part of the quality assurance programme where recognition is given to industry to celebrate their excellence in service and to continue support and guide them to quality achievement. Macao has various accreditations and awards led by both the government and industry.

Government Led Awards
• Quality Tourism Services Accreditation Scheme – Macao Government Tourism Office
• Macao Green Hotel Award – Environmental Protection Bureau
• Certified Shop – Macao Consumer Council

Industrial Led Awards
• Macau Elite Service Award – Exmoo News
• Special Noodle Shop Award – Macau Business Women Association
• Macao Convention and Exhibition Commendation Awards – Macao Trade and Investment Promotion Institute

Source: Project Team

Figure 4.1: Macao’s Tourism-related Awards
4. TOURISM QUALITY AND SERVICE SYSTEM

4.3 SCENARIO ASSESSMENT

1. Assessment of Current Tourism Situation
2. Identify the Key Issues and Assess the Implications
3. Hosting of International Forum, Public Consultation and Stakeholders Interviews
4. Outline the Key Objectives and Strategies
5. Specify Planning Proposals and Action Plans to Drive Implementation

- Quality service is critical to success of “Macao as a World Centre of Tourism and Leisure”. In 2016, tourists rated Macao medium to high level of satisfaction on most measures. Macao has limited human resources and many non-resident workers are employed in the tourism industry, which is challenging to ensure the service quality and tourism industry’s long term development.
- QTSAS is a successful programme covering food and beverage and travel agency, whereas the Consumer Council covers retail businesses.
- There is an abundance of training programmes in Macao but room for improvement for the contents and format.

- Rapidly expanding tourism industry will require more skilled workers.
- Australia, Canada and Singapore offer valuable benchmarks and lessons for tourism quality programmes which can be adopted in Macao.
- Learning Management Systems (LMS) can assist to develop training programmes and organise various tourism standards and regulatory works.

- Shortage of labour - suggest the government to conduct regular assessments of labour demand and supply.
- Concern of relatively poor taxi and tour guide service which will affect tourism industry.
- Suggest QTSAS to be extended to other sectors.
- Suggest training programme to be improved in many respects, including to assist in re-establishing a sense of belonging for the citizens in Macao.
The key objective is to **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 tourist convenience to make itself a world-class tourist destination.

This key objective will be realised by the implementation of three key strategies:

- **Enhance Skills Development in Tourism Industry**: includes broaden the opportunity for career progression, skills training and enhancement for personnel in the tourism industry.

- **Establish an Integrated Tourism Quality Assurance System**: to bring together various aspects of standards and regulations of the tourism industry, to increase the overall tourism service quality and with the end goal of achieving tourist satisfaction.

- **Enhance Service Standards of Tourism Industry**: by continuously promoting quality tourism services and development of service standards.
4. TOURISM QUALITY AND SERVICE SYSTEM

4.4 KEY OBJECTIVE AND STRATEGIES

4.4.1 STRATEGY 1: ENHANCE SKILLS DEVELOPMENT IN TOURISM INDUSTRY

There is a need to promote the concept of career progression to personnel in the different tourism sectors. Employers, businesses and the government have a role in further emphasising the importance of career planning for residents engaged in the tourism industry. On-going skills development can allow residents working in the tourism industry to contribute to the development of Macao as a world-class tourist destination.

The promotion of career progression will support residents in career planning and skills development with convenient learning tools, and also to improve foreign language skills of residents engaged in the tourism industry. Emphasise the importance of career planning and progression, as well their role in contribution towards the building of Macao to become a world-class destination.

Through exploring the possibility of international technical exchange training programmes amongst world famous tourist destinations, to allow residents in broadening their international views, which will assist in their career path development.
4. TOURISM QUALITY AND SERVICE SYSTEM

4.4 KEY OBJECTIVE AND STRATEGIES

4.4.2 STRATEGY 2: ESTABLISH AN INTEGRATED TOURISM QUALITY ASSURANCE SYSTEM

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

It includes the consolidation of requirements and standards of tourism related sectors, where different government departments will work with the industry to discuss in-depth about the corresponding service standards for the tourism industry and other related service sectors. Priority to be given to the service levels provided by the frontline and customers service staff. Work with industry and government departments to jointly establish an integrated quality system.
4. TOURISM QUALITY AND SERVICE SYSTEM

4.4 KEY OBJECTIVE AND STRATEGIES

4.4.3 STRATEGY 3: ENHANCE SERVICE STANDARDS OF TOURISM INDUSTRY

To consistently improve the quality of tourism service, allowing diverse local trades to benefit from quality tourism, and promote the standardisation of tourism industry service. Aim to encourage industry players to provide quality service at all times and promote Macao hospitality, for strengthening Macao’s image as an international tourist city, bringing Macao closer towards its vision of becoming a World Centre of Tourism and Leisure.

To gradually extend and broaden the development of industry service standards, to ensure regular communication between tourism industry, local and overseas training institutions to update the latest industry trend and ensure Macao is engaged to service level of international standards.

Encourage local citizens to participate as tourism volunteers, promoting public awareness on tourism industry and increase the sense of belonging.
The three strategies are conceptual ideas proposed to achieve the key objective as to **improve service quality and skills**, and the three planning proposals are specific implementations, supported by short- and medium-term action plans. Other tourism quality issues that require structural solutions such as upgrading tourism premises or policy changes to enhance industry efficiency are discussed in the chapter - Tourism Industry Cooperation.

**Skills and Workforce Development for Career Path Planning**: tourism is Macao’s core industry. Human resources are the prime element for the sustainable growth of the tourism industry. To help workers advance in their career paths, Skills and Workforce Development aims to enhance the employability, productivity and competitiveness of Macao’s workforce to meet ever-changing market demand.

**Implement a Learning Management System for Integrated Tourism Quality Assurance**: an Integrated Tourism Quality Assurance System with online capability that is accessible by both industry and individuals is needed to consolidate industry standards and information.

**Upgrade Tourism Services to International Standard**: to extend the scope of the current “Quality Tourism Services Accreditation Scheme” to other sectors of the industry and to gradually align Macao’s tourism quality standards with the internationally recognised accreditation schemes.
4. TOURISM QUALITY AND SERVICE SYSTEM

4.5 PLANNING PROPOSALS AND ACTION PLANS

Planning Proposals

<table>
<thead>
<tr>
<th>LAYING THE FOUNDATIONS</th>
<th>FACILITATING PRODUCTIVITY AND EFFICIENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short-Term (0 to 5 years)</td>
<td>Medium-Term (6 to 10 years)</td>
</tr>
</tbody>
</table>

**Skills and Workforce Development for Career Path Planning**

- 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

**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)

**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

- 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)
### 4. TOURISM QUALITY AND SERVICE SYSTEM
#### 4.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 2.1  | **Skills and Workforce Development for Career Path Planning** | • Through the joint efforts of the relevant departments from the human resources area, to promote the Macao skills and workforce development and career path planning in a pragmatic and cost-effective manner.  
  • Through the study of human resource data and statistics to plan for the development of Macao Skills and Workforce.  
  • To continuously explore and define the potential areas of skills development in the industry and to set training strategy that is adaptable to the changes in social and economic development Macao.  
  • To continuously assess and evaluate individuals potential and occupational capability for careers advancement, as well as to provide continuous supports to industry for labour attraction and retention. | • An integrated effort by all relevant departments in human resources area to conduct a regular assessment to define the potential and shortcomings of current skills and workforce development in Macao, and make continuous improvement.  
  • To conduct survey to assess and evaluate the effectiveness of current industry training and to engage the industry by enhancing communications for the development and renewal of trainings that meet the market's needs.  
  • In priority to promote relevant trainings targeted to local residents and industry that have higher development demand and potentials, e.g. in line with the development needs of tourism industry, and timely provision of trainings for the retail and service sector, F&B sector, etc.  
  • To continuously research to promote Macao's labour force (including tourism) under the existing institutional framework to achieve higher employability, productivity and competitiveness. | Human Resources Area |
### Skills and Workforce Development for Career Path Planning | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 2.1.2 | Continued forecast of industry skills and workforce development – tourism industry | • To continuously carry out forecast on the scope and scale on human resources needs, including the types of talent and skills available in the labour market and the industry needs, and to conduct regular reviews and assessments.  
• In order to cope with the society and industrial development needs, the study will continuously research on Macao’s human resources needs, how to safeguard the employability of Macao residents and enhance their horizontal and upward mobility.  
• With the situation of economic development and analysis of statistics, organise timely training courses.  
• The compilation of regular study should provide data and statistics to support government decision in labour development and planning strategy. | • Ongoing surveys on the human resources needs and estimation for talent requirements for major sectors, etc.  
• According to the research result, to develop more employment opportunity for the local residents, and to tailor-made relevant trainings for local resident to acquire skills that can fulfill the job requirement, attract more local residents to join the labour market  
• In view of the current and future needs of the tourism industry, to timely provide different vocational training courses to shorten the gap between the labour market supply and industry demand  
• Through collecting statistics and data from tourism industry on recruitment posts, position details, and vacancy rates, to undertake the forecast of tourism industry skills and workforce development plan | Human Resources Area |
### 4. TOURISM QUALITY AND SERVICE SYSTEM

4.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 2.1.3 | **Formulate international skills and training development programme – tourism industry** | • This action item is to explore and develop an International Skills and Training Development Programme as to support the Skills and Workforce Development Strategy.  
  • To ensure and define the study scope of professional areas that fulfill the needs of industry development  
  • This programme aims to explore and expand more international training opportunities to enhance skills of industry personnel. | • To establish regular meetings with the tourism industry, higher institutions and related departments to develop the International Skills and Training Development Programme, including to define the specification areas of tourism industry for skills development and to set up a priority plan.  
  • To explore a list of local and international qualified institutions for setting up partnership or affiliation programmes.  
  • To communicate and collaborate with local professional institutions and associations to develop national and internationally recognised training courses and skills assessment.  
  • Through the participation in international competitions, to strengthen the exchange of knowledge and skills in vocational training and to promote industry development.  
  • To provide travel industry staff with vocational training to improve the quality of service. | Tourism and Human Resources Areas                                    |
### 4. TOURISM QUALITY AND SERVICE SYSTEM

#### 4.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 2.1.4 | Study of the demand and policy for non-resident workers for Macao’s tourism industry | To continuously explore the labour situation of non-resident workers in tourism industry and to develop appropriate measures where necessary | • To develop continuous research on human resource development that emphasise on local employment priority, sustainable employment, and upward and horizontal mobility. The study shall generate an overall analysis of the labour situation of non-resident workers, which includes the distribution patterns of job positions, sectors, and salary range, etc.  
  • Conforming to consolidated factors including the society’s economic development, the supply and demand of the labour market, the applying institutes’ operation, existing employees and local labour employment situation, to execute, review and approve the application of foreign labour according to the principles of the “Law for the Employment of Non-Resident Workers”.  
  • The outcome of the study should include the recommendations on the non-resident workers issues and the possible policy changes. | Human Resources Area              |
<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| 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) | • The establishment of Learning Management System (LMS) helps to provide a continuous learning environment that promote and improve alternative learning mode.  
• The establishment of LMS helps to consolidate tourism standards, industry codes and standards, and applied skills, etc. | • To consult and study the feasibility of LMS with the industry and higher institutions.  
• To review the rate of computer literacy of the potential target audience for specific programmes set up and its viability; identify and check for the technical specifications required for LMS set up, including: defining the goals for training programmes and curriculum content, tourism service standards and regulations, etc.  
• Through partnership with accredited course and certification bodies, assist in developing industry and skills standards and to build up relevant information for public access. Facilitate and provide the communication channel for local related professional associations to facilitate in the implementation and formulation of industry codes and standards. | Tourism and Human Resources Areas |
4. TOURISM QUALITY AND SERVICE SYSTEM
4.5 PLANNING PROPOSALS AND ACTION PLANS

### P 2.3 Upgrade Tourism Services to International Standard | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 2.3.1 | Feasibility study of the extension of the Quality Tourism Services Accreditation Scheme (QTSAS) to other tourism sectors | • Encourage and support the Macao tourism industry to continuously improve the overall service quality, which help to ensure confidence assurance and the overall quality of Macao visitor experience.  
• To assess the feasibility and potential of the extension of the Quality Tourism Services Accreditation Scheme to other sectors, and to confirm the suitability of the types of tourism sectors for the implementation of the Scheme in order to facilitate the achievement of the goal for quality tourism. | • Through data collection and analysis to evaluate the effectiveness of the current Scheme. To establish a priority plan, time schedule and implementation plan.  
• To consider the use of quality service index developed by the University of Macao for assessment and reference (service quality of hotels, travel agencies, F&B, etc.)  
• To adopt and develop “Enhanced Service” training programme upon the foundation of the MORS (Macao Occupational Skills Recognition System) established by the Institute for Tourism Studies (IFT) with the introduction of a certification scheme for 17 of professions, to help tourism industry to improve the standards of "occupational skills" and "quality service". It also helps to form a good foundation for the extension of the Quality Tourism Services Accreditation Scheme.  
• To consider the potential and possibility of integrating the Consumer Council’s Certified Shop scheme into QTSAS for joint promotion, or to allow data sharing by establishing a centralised database for service industry quality monitoring and advancement. | Tourism Area |
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<th>No.</th>
<th>Action Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 2.3.2 | Implementation of the Tourism Volunteering Programme | • This action plan advocates, encourages and welcomes the residents and volunteers to participate in the Tourism Volunteering Programme, to enhance public recognition and to build up a positive image and branding for Macao Tourism Industry.  
  
  • To help promoting Macao as world-class city through volunteering participation 1) to create a local sense of belonging and to gain tourism awareness, 2) to explore and consider the use of different local human resources, including current students, volunteers and retirees to fill the labour gap in peak seasons, according to their skills levels to execute different tasks such as hospitality and courtesy.  
  
  • To continuously promote the programme with training and incentive scheme. | • To cooperate with tourism related associations, higher institutions and other government departments to jointly promote public participation of the Programme. Encourage the participation of students and citizens to the Programme, of which volunteers with specific language skills will be assigned with tasks to international conferences and events.  
  
  • Learning from other countries’ experiences, to continuously explore other potential human resources through recruitment of university students, part-time and retirees to become volunteers. At the same time, to encourage less qualified residents after training to execute tasks with lower technical demand, such as greetings, handing out leaflets and giving directions to tourists.  
  
  • To plan and select locations for the execution of Tourism Volunteering Programme and to confirm the types and skills required by the volunteers in different areas, e.g. entry points in Macao, at main taxi and bus stands, plazas with higher flow of tourists, etc. to provide tourist information and assistance.  
  
  • To execute the Tourism Volunteering Programme in tackling the changing market trends and seasonal market demand, to identify the skills demand for the target service group. e.g. to implement during the Golden Weeks and festivals by placing volunteers at main tourism spots to provide tourist information service.  
  
  • Volunteers will receive adequate training with basic knowledge and to attend regular updated training to ensure quality tourism service is achieved. | Tourism Area |
CHAPTER 5
TOURISM BRANDING AND MARKETING STRATEGIES
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.1 INTRODUCTION

This chapter covers the current situation on Macao’s source markets and targeted visitor segments, tourism branding and city positioning, and tourism e-marketing. Also, a short discussion on new branding and marketing approaches is included. Relevant comments from the public consultation are summarised. International best practices and benchmarks are referenced. Implementation strategies on tourism branding and marketing are provided to support Macao’s broader vision of a World Centre of Tourism and Leisure.

To be a World Centre of Tourism and Leisure, Macao needs a multifaceted and attractive branding and marketing strategy. The following strategies provide a new direction for tourism markets of Macao and the importance of using innovative technology. This is a direction that many international destinations are taking and Macao can learn from various best in class examples as recommended. The multifaceted branding and marketing strategy can highlight Macao’s image as a lifestyle city and create a strong branding message to attract high-value markets and extend the visitors’ length of stay.

This chapter includes the following:
5.1 Introduction
5.2 Analysis of Existing Conditions
5.3 Scenario Assessment
5.4 Key Objective and Strategies
5.5 Planning Proposals and Action Plans
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.1 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – MACAO’S MAJOR SOURCE MARKETS

- In 2016, Macao had a total of 30.95 million visitors. Macao’s inbound tourism market is dominated by visitors from Mainland China, Hong Kong and Taiwan, that account for over 90% of total visitors.

- There has been a significant growth in arrivals from Thailand, South Korea and Japan.

- It is important to understand other international markets, characteristics and future trends to diversify Macao’s visitor markets in the future, and foster key growth in markets.

Source: Statistics and Census Service
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.2 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – SUMMARY

<table>
<thead>
<tr>
<th></th>
<th>MAINLAND CHINA</th>
<th>HONG KONG</th>
<th>TAIWAN</th>
<th>SOUTH KOREA</th>
<th>JAPAN</th>
<th>MALAYSIA</th>
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<tr>
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<td>156</td>
<td>165</td>
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<td>61</td>
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<td>-3%</td>
<td>-2%</td>
<td>11%</td>
<td>-5%</td>
<td>-7%</td>
<td>1%</td>
<td>4%</td>
<td>-4%</td>
<td>-11%</td>
<td>-1%</td>
<td>8%</td>
<td>-1%</td>
<td>0%</td>
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<th>SOUTH KOREA</th>
<th>JAPAN</th>
<th>MALAYSIA</th>
<th>PHILIPPINES</th>
<th>THAILAND</th>
<th>INDONESIA</th>
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<td>Outbound Tourists (*‘000)</td>
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<table>
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<th>$1,620</th>
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<th>$1,708</th>
<th>$1,688</th>
<th>~</th>
<th>$1,083</th>
<th>~</th>
<th>$1,773</th>
<th>~</th>
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<th>$1,262</th>
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<td>9</td>
<td>5</td>
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<td>4</td>
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<td>7</td>
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<tr>
<td>High Spending Market **</td>
<td></td>
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<td>✗</td>
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<td>~</td>
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<td>✓</td>
<td>~</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
</tbody>
</table>

NOTE:  
* Some countries/regions do not have 2016 data.  
** High Spending Markets refer to the markets with higher per capita visitor spending than the average value in Macao (MOP1,701 at 2016).

Source: Statistics and Census Service; Project Team
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.3 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – BY AGE

Age Group

- In 2016, 28% of the total visitors to Macao aged between 46 – 60, followed by age groups of 26-35 (23%), 36-45 (21%) and 16-25 (12%).
- Only 5% of visitors aged 15 and below visited to Macao in 2016, indicating very few young or student groups came to Macao for travel.
- A large number of matured visitors (aged 46 and above) visited Macao, including the senior travellers are from Hong Kong, Japan, Singapore, USA and UK.

Source: Public Security Police Force
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.4 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – AVERAGE LENGTH OF STAY

**Average Length of Stay for Overnight Visitors**

- The Philippines had the longest average length of stay (ALOS) in Macao at 7.6 days in 2016. Comparatively, Hong Kong and Japan had the shortest ALOS in Macao at 1.7 days and 1.6 days respectively.

- Low LOS is due to Macao’s small size and the lack of different types of attractions for multiple market segments, e.g. families.

- Also, there is an imbalance in the supply of hotel rooms in Macao with 4- and 5-star hotels dominating the market and short of budget hotels. Both numbers of attractions and numbers of hotel rooms are required to increase the proportion of overnight visitors, LOS, and increase overall visitor spending in Macao.

**Overnight Stay & Same Day Visitors**

- In 2016, the share of overnight stay visitors to Macao increased to 51%, up to 15.7 million visitors.

- India had the highest share of overnight stay visitors to Macao in 2016 (83%) among all the source markets.

*Source: Statistics and Census Service*
5. TOURISM BRANDING AND MARKETING STRATEGIES
5.2 ANALYSIS OF EXISTING CONDITIONS
5.2.5 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – PACKAGE TOURS TO MACAO

Package Tours to Macao

- For all visitors on package tours to Macao, 80% visited Macao only, 7% visited Macao and China, 13% visited Macao and another destination (such as Hong Kong) in 2016.

- Visitors from long haul markets (USA, UK, Russia) usually purchase a package tour to Macao once they are in Hong Kong, as it is difficult for them to purchase a Macao package tour in their own countries.

- The share of visitors on “Macao-only” package tours showed a slight drop in 2016 compared to 2015.

- The highest number of the “Macao-only” package tour visitors are from Mainland China (4.5 million in total) and comprising 80% of the total package tour visitors of Mainland China in 2016. PRC package tour visitors are mainly from Guangdong but experienced a year-on-year drop of 17%.

- Package tour visitors have declined in Macao’s key markets including Taiwan, Japan, Malaysia and Singapore, which is typical as a destination matures and attracts more Free Independent travellers (FITs).

Source: Statistics and Census Service
Visitor Spending

- Mainland Chinese visitors are the largest spenders (with MOP1,975 per capita spending) among all of the top source markets.
- Per capita spending of visitors from Mainland China, Japan and Singapore were above the average spending of all visitors.
- Hong Kong visitor’s spending per capita was the lowest among the top source markets.
- Per capita spending of visitors from Thailand and UK has decreased year by year since 2014.
- Shopping occupied the largest share of visitor spending, followed by accommodation and F&B.

Source: Statistics and Census Service
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.7 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – GAMING REVENUE

Gaming Revenue

• Due to the economic condition of the surrounding areas and the decrease in visitor arrivals, total gaming revenue in Macao has decreased since 2014.

• Monthly gaming revenues have experienced a drop in 2015 and 2016 compared with 2014. But the monthly revenues have been resilient since 2016 August.

Source: Gaming Inspection and Coordination Bureau; Statistics and Census Service
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.8 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – MICE MARKET

Macao’s MICE Market

- From 2010 to 2016, the annual number of MICE events held in Macao has remained steady at around 1,000 events per year.
- The number of MICE participants has been increasing dramatically, at a CAGR rate of 13.5% since 2010.
- The total number of participants saw a climbing increase from 2010 to 2014, however witnessed a significant drop since 2015.
- MICE events held in Macao are mostly meetings, comprising over 90% of all MICE events in 2016. Corporate meetings made up the largest share of MICE meetings held in Macao, followed by Association meetings and Government meetings.
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.8 EXISTING CONDITIONS ON MACAO’S VISITOR SOURCE MARKETS – MICE MARKET

Macao’s MICE Market

- More than half the exhibitions had less than 20,000 attendees held in Macao in 2016. This is partially due to the fact that most multinational corporations (MNC) had a protocol of not being allowed to hold events in the venues with casinos. However, most MICE venues in Macao are located in the hotels and resorts area with casinos, which is the challenge to expand MNC events market.

- 47% of the meetings held in Macao in 2016 had about 10 to 49 participants, with close to 30% had over 100 participants.

- Among the different industries that held events and exhibitions in Macao in 2016, the business trade and management, cultural arts attracted the most participants.

- The industries that ranked second and third contain IT, other technology related, tourism, education and training, medical and health; each of the activities held had more than two hundred participants.

- The quality of the entire destination is very important to attract MICE travellers, not just the MICE venues, as business travellers are mixing trips with leisure. Thus, destination quality is necessary to compete with other top MICE destinations in Asia, such as Singapore and Thailand.

Source: Statistics and Census Service
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.9 EXISTING CONDITIONS ON MACAO’S POTENTIAL TARGET SEGMENTS

High-value segments are defined as those segments that will stay longer and spend more diversely in Macao. The four new target segments – Seniors, Affluent, Families and Young-Connected add a new layer to qualifying Macao’s source markets. However, there may be some overlap across these markets:

- Asian countries have a growing young population especially from Southeast Asia (e.g. Thailand, Philippines, Indonesia) and China markets.
- Family travel is also one of the key tourist markets, especially from the populous countries such as China and India.
- There is a growing number of senior travellers in the matured markets such as USA, UK, Japan, Korea, Singapore and Mainland China. Senior travellers have more leisure time and higher consumption power, and are one of the major tourist markets in the world.
- Due to the significant increase in the middle-class households in the emerging economics including China, India, Thailand, Indonesia, the affluent FITs become one of the most important tourist markets.

Macao’s Goal is to Expand Current Market to Families, Young-Connected Travellers, Affluent FIT and Seniors

Source: Public Security Police Force; Project Team
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.10 EXISTING CONDITIONS ON MACAO’S POTENTIAL TARGET SEGMENTS

KEY CHARACTERISTICS OF THE FOUR HIGH-VALUE TARGET MARKET SEGMENTS

Young and Connected Travellers
- **Travel Companions** – Most young travellers choose to travel with friends (37%), family (31%) and alone (21%).
- **Purpose of Trip** – Leisure (62%) is the main purpose of trip for young travellers, followed by visiting friends and relatives (11%) and education (9%).
- **Valuable Accommodation** – Young travellers strongly prefer to stay in high-valuable accommodation including 1 to 3-star hotels, hostels and guest houses.
- **Authentic Experience** – Young travellers prefer the destination to provide them an in-depth experience of the local culture.
- **Technology-savvy** – Over 80% of millennials saying their travel decisions were influenced by online reviews.
- **Destination Choice** – The key factors affecting young travellers’ decisions on destination include “Always wanted to visit”, “Personal recommendation from others”, “Learn more about culture”, “Special offers” and “Cheap destination”.

Affluent Travellers
- **Big Spenders** – They are willing to pay for high quality services including luxury accommodation, dining, shopping, entertainment and life changing events.
- **International Trips** – One of the most popular types of leisure travel. International trips of eight days or longer are by far the most common pick of leisure trip clients.
- **Consult with Travel Advisors but Increasingly Doing Online Research** – Affluent travellers might have limited time to do own research about a destination so they prefer to consult with a professional travel advisor for a tailor-made trip arrangement.
- **Mix Business with Pleasure** – According to The Martini Report Vol. 4, 53% of hyper affluent often combine personal travel with business travel.
- **Fueled by Curiosity** – Seek experiences that make great stories, authentic and local flavor; 76% of travellers are curious about other countries and cultures, always on the lookout for hidden gems. Meanwhile, 54% are in search of unique and different experiences.

Silver-haired Travellers
- **High Spending** – Silver-haired travellers spend more on average than younger travellers.
- **Unique & Pampering Experience** – They prefer to experience a destination with a series of unique and relaxing activities such as guided walking tours, joining wellness activities/ tours. The Macao Traditional Chinese Medicine Technology Industrial Park can be one of the wellness attractions to the silver-haired travellers, especially for those from western countries to experience more of Chinese traditional medicine.
- **High-Standard Accommodation** – Silver-haired travellers prefer amenities and high standards which they are used to at home, such as 4-5 star hotels.
- **Off-peak Traveling** – They tend to travel in non-peak seasons and are more likely to take longer vacations.
- **Prioritise Safety and Comfort**
- **Accessibility** – This is key as a share of this market is likely to have some form of physical disability or needs special assistance/tailored services.

Family Travels
- **Value Consciousness** – Families are looking for valuable packages and special offers when choosing hotels, restaurants and entertainments, etc.
- **Make Memories** – A very important aspect of family travel is to make memories along the way.
- **Stay Healthy and Safe while Travelling** – Healthy eating and wellness are top of mind even when families are away from home.
- **Activities for Kids and Parents** – Families are looking for family-friendly entertainments and activities. For example, kids entertainment zone in shopping mall/ resort can provide children a safe and fun playing environment while parents enjoy quality time.
- **Love Staycations** – Families prefer to visit a short-haul destination with various budget-friendly activities and attractions. The decrease in travel time provides more valuable family time.
- **Maximizing Travel by Travelling with Friends/ Extended Family**

5. TOURISM BRANDING AND MARKETING STRATEGIES
5.2 ANALYSIS OF EXISTING CONDITIONS
5.2.11 EXISTING CONDITIONS ON MACAO GAMING INDUSTRY AND ITS CURRENT BRAND IMAGE

• **Macao has a strong “gaming” image:** Macao remains the dominant player in the Asian gaming market. It is the leading casino destination, outpacing the United States. However, facing the fierce competition in the region, Macao should consider relying less on casino driven visitors and revenue.

• Gaming receipts from different gaming activities in Macao totaled USD28 billion in 2016 compared to USD 28.9 billion in 2015. The gaming market contributed a high percentage to Macao’s GDP.

• In terms of Macao’s future pipeline of casinos, two new mega casinos opened in 2015, two more opened in 2016 and one will open in 2017. Based on the increasing capacity of gaming tables in the future, Macao still has a high demand gaming market. However, given the situations including anti-corruption initiated by the Chinese Government and highly competitive regional casinos development, Macao should consider other strategic directions to keep its leading position.

• **Macao’s Brand Essence:** Gaming entertainment is the main Branding Image of Macao’s tourism in the eyes of many source markets. However, there are many other potential brand attractions available in Macao. Macao can start developing a stronger brand identity focused on cultural contrasts of East and West, old and new, heritage and modern distinctive elements.

• The key for Macao is to merge its cultural dynamics, rich history and unique architecture together with the “World Centre of Tourism and Leisure” vision. Macao’s unique blend of Chinese and Portuguese cultures form a strong brand value. Macao has the high potential to be a destination that makes people visit many times.

*Information Source: Gaming Inspection and Coordination Bureau; Image Source: Macao Government Tourism Office*
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.12 EXISTING CONDITIONS ON MACAO MARKETING STRATEGY

- **Experience Macao Your Own Style**: the latest promotional video talks a lot about the different brand essence of Macao: the harmonious mix of Portuguese and Chinese cultures, its charm for both visitors and residents, learning about the locals, culinary delicacies, historic areas, the fast-paced sporting events and range of festivals, seasonal concerts and shows. It describes family fun and connecting, it is a place for families, for singles or couples. It shows the time passing within a day and something magical at night; it ends with an impression of a full day spent in Macao.

- Macao gives the impression of a limited stay but has a lot more experiences to offer. Future marketing could consider marketing Macao as a multi-day destination. Future marketing could attract different segments in multiple ways through various themes, such as well-being tourism for silver-haired groups, or cultural-creative tourism for young-connected travellers.

- **Collaboration and Leadership in Tourism Marketing**: Marketing and promotion activities in Macao are considerable but can be enhanced with new trends in online marketing. Collaboration in tourism marketing with Overseas Representatives, industry and government groups could be enhanced by way of a centralised source of tourism content carrying a unified brand. Marketing and branding of Macao can be a concerted effort of all agencies and stakeholders since tourism is the pillar industry of Macao.

- **MGTO Overseas Representatives Market Promotion**: Overseas Representatives are the major marketing arm of MGTO. They use extensive marketing strategies popular in their source markets, both traditional and new media, i.e. celebrity blogging, social media platforms and apps.

- **E-Marketing and Social Media Platforms**: Technologies can be put in place to supplement the efforts of MGTO in e-marketing to reach a broader market. Tourism marketing for Macao has had good responses on social media platforms set up by Overseas Representatives. MGTO as the main content provider, is working closely with the Overseas Representatives to build content together.
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.13 EXISTING CONDITIONS ON MACAO ONLINE MARKETING STRATEGY

- MGTO’s website has much to improve following international case examples. Apart from the current website’s marketing limitations, there are also gaps in the development of themes and promotion of packages for tailor-fitted for different target markets.

- It is noted that MGTO created two websites, one is for the marketing and the other is for the industry. However, there are still some limitations including navigability or marketing appeal.

- A member partner extranet can be a separate website specifically for online networking. The “Member Partner Extranet” is separated in order to avoid any conflicting government functions.

- Compared with websites of other international destinations such as Paris, Singapore, London, Las Vegas and Los Angeles, MGTO website has the following additional limitations:
  a) Not fully employed for full value – although there are visible social media buttons, it is not leveraged for promotions.
  b) Full presence not provided on pages
  c) User generated content not provided
  d) Videos are hidden too deep into pages

- MGTO Mobile Apps do not support dynamic content, advanced reservations, real-time experience sharing, geo-referencing, etc. Mobile functionality is available, but with limited use:
  a) Marketing plan not integrated for mobile apps use (non-responsive)
  b) The mobile applications are not visible to intended users or not an attractive tool for sharing
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.14 EXISTING CONDITIONS ON GAPS IN ONLINE MARKETING

- Macao has adopted some international website marketing trends, but there are website marketing strategies that can be taken from international benchmarks, such as Paris, Singapore and Sydney that can further influence Macao’s website design:

  a) Easy to navigate website
  b) Expanded hierarchy of tourism products into multiple themes and experiences
  c) High-quality images and videos
  d) Dedicated marketing for key segments
  e) Use of social media, blogs, popular media, movies and subliminal image building, etc.
  f) Use of storytelling by local residents/brand ambassadors/visitors/celebrities sharing experiences
  g) Interesting magazine like layouts and formats
  h) Use of virtual reality to capture short experience about destinations online
  i) Create a single access to link with the MICE website

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<th>Technology</th>
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*Image Source: Macao Government Tourism Office*
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.2 ANALYSIS OF EXISTING CONDITIONS

5.2.16 EXISTING CONDITIONS ON MACAO MICE MARKETING

- Macao is proactively developing the MICE industry and branding the city to be ‘the center of Asia-Pacific conferences and exhibitions’. Currently, there are 11 recognised world-class conferences and exhibitions regularly held in Macao, including the Macao International Trade & Investment Fair (MIF), Macao International Environmental Co-operation Forum & Exhibition (MIECF) and Global Gaming Expo (G2E Asia). In the future, Macao will strengthen cooperation with Portuguese-speaking countries for the further development of MICE industry.

- Macao MICE marketing – MICE has been transferred to Macao Trade and Investment Promotion Institute (IPIM). The Macao SAR Government set-up the Committee for Conventions and Exhibitions that regularly coordinates with the industry. According to the data of 2016, 94% of the MICE events in Macao were Meetings and Conventions, in which, 54% of the meetings and conventions were corporate meetings and 26% association meetings. The marketing strategy is viewed as weak in light of a major strategy of marketing Macao as a MICE destination.

- Macao MICE Portal & mobile app – IPIM launched the Macao MICE Portal in November 2012, to provide news and developments, activities and facilities for local and overseas event organisers, industrial and business visitors. IPIM also launched the MICE mobile app. The app serves more like an informative platform to provide the latest news on Macao MICE. IPIM may consider expanding functions of this app to provide additional service to industry partners, respond to event organisers and chase after RFPs.

- IPIM has launched the following incentive measures for continuously supporting the development of the Macao convention and exhibition industry:
  a) The International Meeting and Trade Fair Support Programme
  b) The Convention and Exhibition Stimulation Programme
  c) Financial Incentives for Participation in Exhibitions and Fairs
  d) “One-Stop Service” for MICE Bidding and Support in Macao
  e) MICE Trade Shows Rewards Programme
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.3 SCENARIO ASSESSMENT

• Considered a top destination by numbers, Macao received nearly 31 million visitors in 2016.
• Macao tourism is led by the fast growing Mainland China market. Macao’s visitor numbers reveal a leaning towards Greater China, with a share of more than 90% compared with other source markets.
• More than half of visitors to Macao stayed overnight in 2016; length of stay is short compared with other world-class tourist destinations.
• MGTO conducts promotion and marketing via its Overseas Representatives; trends show website-mobile-social media as driving marketing.

• Macao needs to rethink its website, mobile and social media marketing strategy. Responsive website redesign with added functionality, dynamic content, multi-language, compelling images can make a big difference to its current marketing.
• Macao is challenged with increasing overnight visitors and visitors’ length of stay; attracting quality visitors is a related issue.
• New high-value young-connected, families, affluent and seniors, as well as MICE, are market segments to cultivate.
• Macao needs to diversify away from a gaming image to a diversified multi-day and mono-Macao image.

• The public emphasises expanding source markets & balancing tourism quality vs. quantity.
• The public supports a brand shift to a multi-day diversified Macao highlighting cultural uniqueness and a reduced gaming image.
• The public views that addressing resident’s leisure needs may influence the rebranding of Macao.
The key objective is to **rebrand Macao as a multi-day destination and expand high-value markets.** This objective is reflected in proposed direction and strategies that also build on Macao’s changing image and vision of a World Centre for Tourism and Leisure.

This key objective will be realised by the implementation of four key strategies:

- **Attract High-value Market Segments:** implement a visitor-centric approach to attract high-value market segments across countries to visit Macao. The four major high-value target segments identified for Macao are: the young-connected, silver (seniors), affluent, and families.

- **Enhance the Macao’s Multi-day Destination Brand Image:** Macao possesses a wealth of good tourism resources, including a unique world cultural heritage, western and eastern culture, world-class facilities, and professional services. Existing and new experiences can be highlighted to encourage visitors to explore the city more deeply; and to extend the overall length of stay of overnight visitors. There is a number of new products and experiences beyond popular tourism areas in Macao that visitors have yet to explore. Macao has the potential to become a mono-destination or a primary destination of choice.

- **Support and Promote MICE Development:** MICE business is a growing market sector in the global tourism industry. For Macao, transforming into a competitive, international MICE destination will reinforce its overall tourism development. Macao should strengthen its MICE organisation, promote its MICE resources, be more proactive in chasing MICE, and provide more deliberate and effective MICE marketing strategies.

- **Conduct Online Tourism Marketing:** there is a trend for destinations shifting from traditional marketing to a combination of traditional and online marketing. By redesigning the official marketing website and strengthening social media marketing, Macao can differentiate itself and fully make use of its unique stories and resources. Macao can aspire to make it to the Skift list to capture and attract new source markets.
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.4 KEY OBJECTIVE AND STRATEGIES

5.4.1 STRATEGY 1: ATTRACT HIGH-VALUE MARKET SEGMENTS

In order to achieve the vision of a World Centre of Tourism and Leisure, a very crucial first step for Macao is to broaden its source markets. By implementing a country-based marketing strategy, Macao attracted nearly 31 million visitors in 2016. It is suggested Macao to continue the implementation of the country-based marketing strategy, but also implement a visitor-centric approach focused on extending overnight stays and capturing new segments; in particular, the high-value market segments across countries, which include the young-connected, the silver-haired, the affluent and the family markets.

Key Strategies to Meet the Objective

• Collect additional market analytics (i.e. through implementing a system for collecting exit forms, visitor surveys) that provide intelligence about visitors, visitor preferences and experiences.
• Conduct/ commission country specific market research to understand each high-value target segment, including their consumer behaviors, travelling characteristics, expectations of travelling in Macao, preferences of accommodations, attractions, dining and average spending, etc. MGTO should collaborate with the Overseas Representatives to conduct these specific research reports regularly and continually update its market intelligence.
• Work with the Overseas Representatives to prioritise target markets across the high-value markets and summarise characteristics/ preferences of each market segment to achieve the goal of extending length of stay.
• Use both traditional and web-based/ e-marketing, but slowly increasing emphasis on ‘web-mobile’ to expand beyond source markets to new markets.
• Develop a continuing programme of social media campaigns targeting different market segments and promoting relevant activities in Macao.
• Encourage local residents and visitors to share their travelling experiences in Macao which could be supportive to online marketing.
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.4 KEY OBJECTIVE AND STRATEGIES

5.4.2 STRATEGY 2: ENHANCE THE MACAO’S MULTI-DAY DESTINATION BRAND IMAGE

Compared to other international visitor destinations such as London, Singapore and Hong Kong, Macao has relatively shorter visitor length of stay. In 2016, the average length of stay of overnight stay visitors in Macao was 2.1 days. As the Asian markets evolve, Asian travellers prefer to have an in-depth travelling experience in one destination rather than a short and simple sightseeing trip or city-stop-over. Rebranding Macao as a multi-day destination is fundamental to achieving the overall goal of a World Centre of Tourism and Leisure.

Key Strategies to Meet the Objective

- Commission a brand consultant to help create a comprehensive branding programme for Macao’s new target markets and implement the marketing scheme to change the brand image of Macao into a multi-day mono-destination. Develop different brand messages, themes, itineraries and packages for each high-value segment and source market.
- Design/ make available a menu of multi-day tour options for each high-value segment to have the opportunity to create their own itineraries and develop a library of dynamic and new content.
- Increase web and mobile functionality. Make the MGTO website, mobile and tablet friendly and upgrade the existing mobile apps of MGTO. Upgrade the itinerary planner with geo-location and more visitor responsive functions. Support more languages according to the source market trends. Support the creation of diversified products stories and themes to enhance experiential offering.

Image Source: Macao Government Tourism Office
5. TOURISM BRANDING AND MARKETING STRATEGIES

5.4 KEY OBJECTIVE AND STRATEGIES

5.4.3 STRATEGY 3: SUPPORT AND PROMOTE MICE DEVELOPMENT

Macao has world-class meeting venues, various supporting incentive measures and professional MICE services. Macao is also situated in a strategic location with good accessibility in the region. To market Macao as an international MICE destination is to complete the overall goal of a World Centre of Tourism and Leisure.

Key Strategies to Meet the Objective

- Strengthen the tourism-MICE cooperative marketing. Enhancing the mechanism or tools for co-ordination between the Committee for the Development of Conventions and Exhibitions and the Tourism Development Committee (CDT) to strengthen the MICE organisation and marketing.
- Enhance public-private cooperation for MICE area through CDT. Local tourism players with interest in the MICE market including airlines, airports, ferry terminals, integrated resorts, meeting venues, suppliers & vendors and visitor attractions to develop extensive programmes and incentives to support Macao’s tourism offerings and extend MICE visitors’ length of stay.
- Link MICE incentive programmes to activities, attractions, integrated resorts, etc., aside from just providing financial support.

Image Source: Macao Government Tourism Office
5. TOURISM BRANDING AND MARKETING STRATEGIES
5.4 KEY OBJECTIVE AND STRATEGIES
5.4.4 STRATEGY 4: CONDUCT ONLINE TOURISM MARKETING

Visitors nowadays prefer to have all destination information from the internet especially since it has become increasingly easy and convenient to access information readily from social media platforms. The young-connected travellers are more technology-savvy and influenced by social media marketing but the majority of travellers are not far behind. By enhancing the online tourism marketing activities, destinations can enhance Macao’s image as a World Centre of Tourism and Leisure, have a much wider reach on their intended markets and provide increased convenience to visitors both prior to their travel and in-market.

Key Strategies to Meet the Objective

- Redesign the MGTO website and the mobile applications.
- Jointly develop and promote advocacy programmes to encourage visitor real-time sharing of Macao traveling experience via social media platforms.
- Study the use of innovative technologies (i.e. AR, VR, Apps, beacons) to support creating visitor experiences.
- Consider integrations with third-party platforms, reviews and map sites (i.e. Google maps, Agoda, TripAdvisor, Yelp, Baidu, etc.) for content shared by visitors. Consider links to the MICE platform.
The four strategies are conceptual ideas which achieve the key objective as to **rebrand Macao as a multi-day destination and expand high-value markets**. Four specific implementation strategies are developed by the instruction of the conceptual ideas.

**Enhance the Marketing for High-value Target Segments:** this includes collecting targeted intelligence, formulating customised marketing campaigns and promoting Macao to high-value target segments including young-connected, silver-hair, affluent and families. Extensive marketing programmes and intensifying international promotions will help to increase the number of overnight visitors.

**Rebrand Macao as a Multi-day Destination:** Macao possesses a unique world cultural heritage, Eurasian-cultural immersion, natural and built assets and world-class facilities. Existing popular and new experiences can be created to emphasise offering a diverse range of themes, endorsements, stories, blogs in support of Macao’s new image as a multi-day destination. This new branding will drive visitors to make Macao the destination of choice and consider an extended stay.

**Strengthen the MICE Organisation and Marketing:** facilitate the integration of new information on MICE resources (i.e. suppliers and vendors, MICE facilities, venue, MICE bids, MICE marketing and promotions) via a more engaging portal/ website, a collaborative marketing platform and more engaged organisational mechanism for the planning of MICE with tourism activities.

**Upgrade Online Marketing Systems and Content:** enhance the Macao Government Tourism Office official website by using innovative website technology and applications, as well as high quality images for subliminal image building where the brand message is delivered in multiple ways to the target markets. With improved marketing capabilities, Macao can provide visitors dynamic tourism information and experiential offerings, and attract more potential visitors.
## 5. TOURISM BRANDING AND MARKETING STRATEGIES
### 5.5 IMPLEMENTATION STRATEGIES

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<td>Short-Term (0 to 5 years)</td>
<td>Medium-Term (6 to 10 years)</td>
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### P 3.1 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

### P 3.2 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

### P 3.3 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)

### P 3.4 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
CHAPTER 6
TOURISM INDUSTRY AND CITY DEVELOPMENT
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.1 INTRODUCTION

For Macao to pursue the vision of “World Centre of Tourism and Leisure”, the quality of life of the residents is the biggest attribute to the vision. While the tourism industry is the primary economic pillar, the pace of city development impacts on people’s lives in different aspects, such as the living and natural environment.

By definition, for Macao to achieve a World Centre indicates that certain standards in the overall environment shall be achieved. Therefore, there are some key issues and obstacles that are needed to be improved from the city development perspectives before realizing this vision. This would require the collaboration and cooperation among the government, the industry, local citizens and relevant stakeholders. Furthermore, these improvements will bring benefits to the local residents as well as advancing Macao to be a world-class travel destination.

This report explores the tourism industry and city development for Macao. Key elements of the report include the baseline analysis, case studies that suits the development agenda for Macao, and the input collected during the public consultation. The strategies, planning proposals and action items which are supported by short, medium and long term. Below outlines the different sections of the report:

This chapter includes the following:

6.1 Introduction
6.2 Analysis of Existing Conditions
6.3 Scenario Assessment
6.4 Key Objective and Strategies
6.5 Planning Proposals and Action Plans
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.1 INTRODUCTION

6.1.1 PRINCIPLE OF SUSTAINABLE DEVELOPMENT

Across the years, sustainable development is the overall trend and direction for cities, aiming to achieve a balance development among economic, social and the environment. With the tourism industry as one of the fastest growing economy, sustainable tourism is defined as:

• "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities".

• A suitable balance must be established between the economic, socio-cultural and environmental aspects of tourism development to guarantee its long-term sustainability.

• Development of sustainable tourism requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building.

• Achieving sustainable tourism is a continuous process which requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.

• Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the visitors, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

Sustainable tourism should:

1. Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.

2. Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.

3. Ensure viable, long-term sustainable economic development, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS

6.2.1 PLANNING IN THE REGIONAL CONTEXT

- Considering the regional context for the functional division of Macao and the Pearl River Delta Region, there are three development cores:
  - Hong Kong-Shenzhen Development Core
  - Guangzhou-Foshan Development Core
  - Macao-Zhuhai Development Core

- According to the “Planning Study on the Co-ordinated Development of the Greater Pearl River Delta Townships” (2009), Zhuhai and Macao will cooperate and develop tourism industries, such as exhibition, recreation and theme park. These cities will work together to become an attraction core along the southern coastline of the Pearl River Delta Region;

- The construction of the Hong Kong-Zhuhai-Macao Bridge (HZMB) and Guang-Zhu intercity rail will improve the future accessibility of Macao in the regional context. Infrastructure in the region will be able to enhance and benefit the overall accessibility of Macao, opening the city to more destinations.

- The rapid development of the surrounding cities in Pearl River Delta Region will bring both competitive advantage and competition to the city.

Source: Land, Public Works and Transport Bureau Official Website
Image Source: Guangdong Provincial Department of Construction, the Development Bureau of Hong Kong Special Administrative Region and the Secretariat for Transport and Public Works of Macao Special Administrative Region: “Planning Study on the Co-ordinated Development of the Greater Pearl River Delta Townships”, 2009; Project Team
6. TOURISM INDUSTRY AND CITY DEVELOPMENT
6.2 ANALYSIS OF EXISTING CONDITIONS
6.2.2 CURRENT TOURISM SPATIAL DEVELOPMENT

The tourism resources in Macao are scattered in different districts without proper connectivity. Some of the districts are dominated by historic attractions, while others are mainly hotels and modern entertainment facilities. Stronger connections will be required for future development.

Existing tourist spots and tourism attraction areas include:

1. Historic Center of Macao
2. Macao Tower and Vicinity
3. Hotel and Entertainment Cluster in NAPE
4. Fisherman’s Wharf & Cultural Facilities
5. Kun Iam Temple and Vicinity
6. Taipa Old Town
7. Cotai Strip
8. Panda Pavilion & A-Ma Cultural Village
9. Coloane Old Town
10. Portas Do Cerco and Vicinity

Source: Project Team
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS
6.2.2 CURRENT TOURISM SPATIAL DEVELOPMENT

Macao with a long history of development, the city has a number of dilapidated spaces and buildings. Some of them are seen as urban regeneration opportunities which has the potential to develop into new tourism development areas, forming into a bigger cluster of tourism parcel. Potential redevelopment areas in the city are potentially seen as new tourism resources.

The tourism related urban regeneration research and projects are as follow:
1. Feasibility Study of the Coloane Regeneration Plan
2. Rua dos Navegantes Regeneration Plan/ Lychee Bowl Regeneration Study
3. West Wing of Historic Center Planning Study
4. East Wing of Historic Center Planning Study
5. Guangdong-Macao New Checkpoint Project

Source: Land, Public Works and Transport Bureau Official Website ; Image Source: Project Team
Pedestrian environment can improve the quality of life of the resident. Meanwhile, the surrounding environment could be optimised to facilitate the overall development of tourism.

**Pedestrian Nodes and Squares**

Most of the current conditions of pedestrian nodes and squares in the pedestrian priority zones are considered as pleasant, such as Senado Square in the Historic Centre, Tap Seac Square, and the President A.R. Eanes Square in the Coloane Village.

**Major Pedestrian Roads**

Some major pedestrian roads in pedestrian priority zones have been improved and are in good condition, such as Travessa de Paixao and St. Lazarus parish. However, some of the roads are facing different challenges. For instance, Rua de Cinco de Outubro contains different urban issues, including illegal parking and the existence of idle land parcels.
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS

6.2.4 OVERVIEW OF WATERFRONT AREAS

Although Macao Peninsula is surrounded by water bodies, most of the waterfront areas stay as inactive spaces and has low level of utilization. The place making of waterfront creates more leisure space for the residents and sightseeing spots for the visitors. Currently, the waterfront assets for Macao is concentrated in the following areas:

South Waterfront of Macao Peninsula

The South Waterfront of Macao Peninsula starts from the Inner Harbour Ferry Terminal and ends at the Outer Harbour Ferry Terminal. According to the distribution of current tourism attractions and the “New Reclamation Area Master Plan”, it will be the most concentrated area for visitors in the future.

The total length is approximately 6.3 kilometers, composed of:

- Industry Waterfront (Inner Harbor Ferry terminal – A-Ma Temple), about 0.8 kilometer;
- Transportation Waterfront (A-Ma Temple – Macao Tower), about 1.4 kilometers;
- Undeveloped Waterfront (Macao Tower – Science Museum), about 2.4 kilometers;
- Tourism Waterfront (Science Museum – Fisherman’s Wharf), about 1.7 kilometers.

Source: Project Team; Image Source: Macao Government Tourism Office
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS

6.2.4 OVERVIEW OF WATERFRONT AREAS

Sai Van Lake Waterfront (2.4 km)

- Residential Waterfront (Pousado de Sao Tiago to Fortress of Our Lady of Bom Parto - 1 kilometer) is a quiet and nice public space for recreation and is mostly used by local residents;
- Transportation Waterfront (Pousado de Sao Tiago to Macao Foundation, 1 kilometer) is occupied by a main road (Avenida Dr. Sun Yat-Sen), and is not fully utilised;
- Undeveloped Waterfront (along Avenida Dr. Stanley Ho) is about 0.4 kilometer.

Figure 6.5: Sai Van Lake Waterfront Analysis

Source: Project Team; Image Source: Macao Government Tourism Office
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS

6.2.4 OVERVIEW OF WATERFRONT AREAS

Nam Van Lake Waterfront (2.8 km)

- Water Sport Center’s length is about 0.7 kilometer;
- Undeveloped Waterfront’s length is about 0.3 kilometer;
- Transportation Waterfront’s length is about 0.4 kilometers, which is occupied by a main road (Avenida Dr. Sun Yat-Sen), the other side of the road is New Reclamation Area Zone B.
- The Comprehensive Development Waterfront is an urban area with large scale resort hotels and office towers. Part of the waterfront presents a nice pedestrian environment, its length is about 1.4 kilometers.

Figure 6.6: Nam Van Lake Waterfront Analysis

Source: Project Team; Image Source: Macao Government Tourism Office
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS

6.2.5 POPULATION DENSITY

Macao has limited land resources. Based on Statistics and Census Service’s 2016 statistical data, its population is 644,900 people and accommodates 21,000 people in each km². The densest parishes are N. S. de Fátima (37.8%), Santo António (21.1%) and Taipa (15.7%). With reference to the 2011 census data, Macao has a higher population density than Taipa and Coloane. While some of the tourism areas are overlapped with the districts with high population density, this will trigger the issue of overcrowding. Relevant discussion on Tourism Carrying Capacity will be explored in a separate chapter.

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**Chart 6.1: Macao’s Parishes’ Population Density (2016)**

Source: Statistics and Census Service; Image Source: Project Team
6. TOURISM INDUSTRY AND CITY DEVELOPMENT
6.2 ANALYSIS OF EXISTING CONDITIONS
6.2.6 REVIEW OF THE NEW RECLAMATION AREA

With reference to the “New Reclamation Areas Master Plan”, distribution of land use plan is listed as follows:

- Total reclamation area: 350 ha
- Land area for residential development: 87.7 ha (25.1%)
- Land area for commercial and public facilities: 67.6 ha (19.4%)
- Land area for green and public open space: 86.3 ha (24.6%)
- Land area for public infrastructure: 108.4 ha (30.9%)
- Population accommodated: 162,000

For the land area for commercial and public facilities, it is estimated that 41 ha will be for multipurpose development used by residents and visitors.

Function Zones Related to Tourism Purpose

- Zone A: The northern and middle part of the island are planned for residential use, the southern part can be developed into a creative industries and public facilities. Zone A will provides an iconic cultural mixed-use district for residents and visitors.
- Zone B: Planned for mixed use, including residential, institutional use, recreation and exhibition. A major MICE complex will be planned in the western part.
- Zone C & D: Mainly a residential district. A mid-density commercial center at the western part of Zone C will be planned for residents and visitors.
- Zone E1: it is close to the airport and Taipa Ferry Terminal, a large parcel of land is reserved for integrated commercial services, integrated tourism and leisure, MICE and creative industries.

6. TOURISM INDUSTRY AND CITY DEVELOPMENT
6.2 ANALYSIS OF EXISTING CONDITIONS
6.2.7 TOURISM AND THE ENVIRONMENT

- Environment is a broad reaching term that can be defined as the physical and biological conditions that surround and influence us. Tourism development has various positive and negative interactions with the environment:
  - It can have a negative impact on the environment, leading to natural resource degradation;
  - It needs to take into consideration environmental hazards and risks to preserve safety;
  - It should not adversely affect quality of life for residents;
  - Environmental conditions need to be maintained at certain standards to ensure an enjoyable visitor experience.

- The increase of driving forces from the tourism industry is adding pressure to the environmental condition for the city, rising population and visitor are consuming more resources and degrading the environment.
  - Based on the “Report on the State of the Environment of Macao 2015”, it is indicated that driven by the growth of population and tourism intensity, resource consumption and pollutant emissions both maintained a rising trend in spite of the declining economy. In particular, significant increase was recorded in electricity consumption and waste transferred to the Macao Refuse Incineration Plant for treatment, which indicates that the environmental efficiency kept descending in Macao.

6. TOURISM INDUSTRY AND CITY DEVELOPMENT
6.2 ANALYSIS OF EXISTING CONDITIONS
6.2.7 TOURISM AND THE ENVIRONMENT

Air Quality

- Transport sector is still one of the major sources of atmospheric pollutant emissions in Macao in 2015. The number of motor vehicles in Macao maintained an increasing trend and increased by 3.8% in 2015 as compared with 2014, however, the growth rate declined. Besides, the motor vehicle density also increased and stayed at a higher level in 2015 than 2014, indicating there are more and more motor vehicles per kilometer. From the tourism industry perspective, tour bus, hotel shuttle bus and limousines are adding pressure to the road traffic and thus affecting the air quality in Macao.

- Besides the fuel consumption from land transport was on the rise in 2015 with the increasing number of motor vehicles, there was also an increase in the fuel consumption from maritime transport. The aviation industry was more prosperous in 2015 as compared to 2014, with the significant increase in the number of inbound and outbound flights, it has led to the increment in fuel consumption. The growing number of visitors will bring together the demand on roads, maritime and air traffic, thus worsening the air quality of Macao.

- Based on the environmental condition described above, the Environmental Protection Bureau has implemented different measures to improve the overall air quality. It is recommended to constantly promote the adoption of environmentally-friendly vehicles, advocating green commuting, introduction of energy efficiency management, encourage the utilization of energy-efficient products and equipment, so as to effectively reduce the emissions of atmospheric pollutants and greenhouse gases.

6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS

6.2.7 TOURISM AND THE ENVIRONMENT

Noise Monitoring

- Noise forms an integral part of the quality of our ambient, and will greatly impact the quality of life of residents and the travelling experience of the visitors. Noise in Macao is primarily attributed to the increase of population, motor vehicles and construction works.

- Macao has 5 ambient noise monitoring stations, located in Macao Peninsula, Taipa, Coloane and the Macao Ecological Zone.

- Based on the 2014-2015 statistics provided by the Environmental Protection Bureau, aside from the Macao Ecological Zone, the every 24-hours Leq average of 72.96dB, and Horta e Costa Station has the highest average of Leg of 75.1dB

- The comparison shows that the noise level of various areas in Macao (aside from the Ecological Zone Monitoring Station) are generally higher than those of other Asian countries.

- Based on the above, the high level of the overall noise of Macao is caused by the increasingly busy traffic and construction works. As the tourism industry continues to grow, the establishment of integrated resorts, tourism facilities and infrastructure developments have been increasing the noise level of the city.

### Chart 6.3: Annual Average Hourly Leq at Each Fixed Ambient Noise Monitoring Station (2014 – 2015)

### Table 6.1: Noise Level Standards in Asia

<table>
<thead>
<tr>
<th>Category (dB(A))</th>
<th>Singapore¹</th>
<th>Thailand²</th>
<th>Japan³</th>
<th>Taiwan⁴</th>
<th>Mainland China⁵</th>
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</thead>
<tbody>
<tr>
<td>Daytime</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>L_{eq}</td>
<td>75</td>
<td>-</td>
<td>60</td>
<td>67</td>
<td>60</td>
</tr>
<tr>
<td>L_{eq} (5min)</td>
<td>90</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Nighttime</td>
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</tr>
<tr>
<td>L_{eq}</td>
<td>65</td>
<td>-</td>
<td>50</td>
<td>57</td>
<td>50</td>
</tr>
<tr>
<td>L_{eq} (5min)</td>
<td>70</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Every 24 Hours L_{eq}</td>
<td>-</td>
<td>70</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Every 8 Hours L_{eq}</td>
<td>-</td>
<td>75</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>


Source: Environmental Protection Bureau
Green Space and Ecological Environment

- In 2015, the total green space in Macao accounted for 28.6% of the total land area. This green area in Macao includes recreational green space, ecological landscape green space, traffic infrastructure green space and nursery for urban greening. It also includes some uncommonly used green space such as airport runway and the racecourse.

- According to the Environmental Protection Bureau’s report, in 2015 Macao has 750 animal species with an average annual decrease of 3%, mainly in the bird category. As a way to protect the ecological environment, the ecological zone is served as the habitats for endangered species. By the end of 2015, precious and rare animals that are listed under second class of the state protection have been found in the zone, including the Black-faced Spoonbill. During the bird season of 2015, a highest number of 62 endangered Black-faced Spoonbills were recorded within the ecological zones, which was fairly similar to the record of 63 in 2014.
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.2 ANALYSIS OF EXISTING CONDITIONS

6.2.8 GREEN TOURISM INITIATIVES

To promote the importance of environmental protection, Macao has adopted the following green initiatives in the tourism industry:

- There are a few programmes focused primarily on tourism and the environment. Programmes focusing on hotel operations have been the most prominent.

- The “Green Hotel Award” was established by the Environmental Protection Bureau for a decade since 2007. The award was launched to raise the awareness of the importance of environment management in Macao’s hotel industry, commend those hotels which have adopted environmental measures and encourage the hotel industry to continuously improve the measures for environmental protection. The Award’s judging criteria include hotels’ progress in the compliance to environmental regulations, electricity consumption, water consumption, waste management, air quality, noise control, transportation and light pollution. Moreover, the Award encourages the implementation of environmental protection policy by hotel clients, suppliers, and contractors.

- Since the “Green Hotel Award” was established in 2007, the total number of the Green Hotels have grown from the 8 to 47, a 6-fold increase, increasing from 10% to 40% of the total number of hotels in Macao. The number of awarded hotel rooms have surged from 1,500 to 22,000 rooms, a 15-fold increase, increasing from 10% to 60% of the total number of the hotel rooms.

- To further promote this initiative, the Macao SAR Government launched the “Environment Protection and Energy Conservation Fund” in 2011 which aimed to provide funding support for hotels to purchase or replace energy efficient, low emission and water saving products and equipment.

Source: Environmental Protection Bureau
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.3 SCENARIO ASSESSMENT

- The rapid development of the surrounding cities in Pearl River Delta Region will bring both competitive advantage and competition to the city.
- The tourism attractions are scattered in different districts without proper connectivity.
- Decaying urban areas can be found, some of them are located in centre of the city.
- New Reclamation Area Master Plan provide more new development space for Macao, but the land for tourism development is limited.

- Establish a smooth transportation connection system between different tourism districts in order to provide visitors with more convenience and flexibility.
- The need for identification of new tourism areas is immediate, with opportunities arising from dilapidated area, the under-utilised waterfront area and new town reclamation areas.
- Connectivity for both vehicular and pedestrian would require enhancement.

- The general public are mostly in support of the proposed redevelopment projects.
- Traffic congestion is seen as one of the biggest bottleneck for further tourism growth.
- Balance between economic growth and livelihood of residents is important, especially in the course of resource allocation.
The key objective is to **optimise urban development model**. To selectively redevelop the urban areas and develop the new reclamation areas to provide quality living, tourism, civic and cultural spaces for residents and visitors.

This key objective will be realised by the implementation of four key strategies:

- **Introduce New Tourism Areas**: implement urban redevelopment projects in different areas of Macao can provide quality living, tourism, civic and cultural spaces for residents and visitors. The development of selected spots in the 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 also provide a pleasant tourism leisure 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 accessibility to more tourism source markets.
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.4 KEY OBJECTIVE AND STRATEGIES

6.4.1 STRATEGY 1: INTRODUCE NEW TOURISM AREAS

Ever since the 16th century, Macao has been developing for centuries and with expedited evolution in the last decade. The sudden economic growth has degraded the city’s resources in various aspects, resulting an imbalance city development in certain districts. While limited resources are being allocated to specific districts only, some urban areas remain dilapidated which generate unfavorable conditions and deteriorating the quality of life of the residents, who in turn urge for urban regeneration.

The number of visitors to Macao increased year by year, and over-crowding becomes an issue faced by the tourism industry. Seeing the demand for urban regeneration by the public, urban redevelopment projects are seen as solutions to rejuvenate the decaying areas, restoring vibrancy to the neighborhood as a way to improve the overall quality of life of the residents. The Master Plan proposes the introduction of new tourism offerings and products as a catalyst and drivers, thereafter a quality living, tourism and cultural spaces for residents and visitors would be achieved. In addition to the redevelopment areas, selected spots in the new reclamation areas can also be reserved for new tourism areas for tourism, culture, leisure and open space.

With the introduction of more new tourism areas, the crowds can be diverted to different districts thus achieving a more balanced development for the city as a whole.

*Image Source: Macao Government Tourism Office*
6. TOURISM INDUSTRY AND CITY DEVELOPMENT
6.4 KEY OBJECTIVE AND STRATEGIES
6.4.2 STRATEGY 2: UPGRADE OF GROUND TRANSPORT

Ground transport refers to both pedestrian and vehicular movement within a city. In any world-class tourist destination, proper connectivity is essential to connect people through walking or driving. The degree to which transportation networks such as streets and walking paths, connect people to their destinations will affect visitors’ overall impression. Good connectivity provides easy access and convenience to key destinations for pedestrians, including both residents and visitors. Smooth road networks allows drivers to reach their destination on time, avoiding the overall economic impacts incurred during congestions.

Further to the importance of connectivity, the overall ambient and the surrounding amenities also draw a significant impact to a city. Enhanced pedestrian walkways should contain standardised signage, aesthetic street furniture and spacious environment. A citywide improvement scheme will be required to provide a consistent image for the city as a whole, which can bring positive value to the city image and branding. More importantly, this can also improve the quality of life for the residents, thus moving Macao towards a livable and sustainable city.
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.4 KEY OBJECTIVE AND STRATEGIES

6.4.3 STRATEGY 3: MONITOR AND MANAGE THE QUALITY OF ENVIRONMENT

With tourism industry as the primary economic driver in Macao, the industry holds a significant role in safeguarding the natural resources of the city. With the growing consumption by tourists, degradations have brought to the different environmental parameters, such as air, water, noise, waste and others. The quality of the environment is thus threatened due to exploding growth and development. As such, this Master Plan suggests different measures and mitigation methods to minimise pollution and to elevate the environmental quality for the city. Strict monitor and management of better environment would improve the overall living environment of the city.

Measures and mitigations begin with reduction, while improvement in innovative design and technology provides new approachable alternatives. Schemes to minimise resource consumption, green building design, and environmental friendly tools to meet environmental standards will contribute and improve the overall environmental quality.

Image Source: Macao Government Tourism Office
6. TOURISM INDUSTRY AND CITY DEVELOPMENT

6.4 KEY OBJECTIVE AND STRATEGIES

6.4.4 STRATEGY 4: IMPROVE ACCESS TO MACAO

City accessibility is an indispensable part of any sustainable city. Transportation infrastructure is a vital condition for any city to have a continual city growth and development, thus infrastructure networks play a crucial role in providing sufficient access to different resources. Connectivity comes in with two levels, internationally and regionally, whereas their modes of transportation include air, sea and land.

On the international level, Macao is of close proximity to the highly accessed Hong Kong International Airport (HKIA); currently linked through the Skypier which provides regular ferry service between the two cities and bringing international visitors into Macao. The direct connectivity between Macao and HKIA will escalate Macao’s connection to many more world destinations. Aside from HKIA, direct and convenient connection with major airports in the region are found to be important, including Guangzhou Baiyun International Airport and Shenzhen International Airport.

On the regional level, Macao’s regional infrastructure including the Hong Kong-Zhuhai-Macao Bridge and Guang-Zhu Intercity Railway will be able to increase the level of accessibility of the city connecting to the major cities of the Pearl River Delta and create the advantages of convenient transportation for Macao.

*Image Source: Macao Government Tourism Office*
6. TOURISM INDUSTRY AND CITY DEVELOPMENT
6.5 PLANNING PROPOSALS AND ACTION PLANS

The four strategies are conceptual ideas which achieve the key objective to **optimise urban development model**. The four planning proposals are specific implementations, supported by short-, medium-, and long-term action plans.

**Development of Potential Tourism Areas into New Tourism Spots:** the provision of new tourism areas or resources can be identified through new reclamation areas, urban regeneration areas, old city areas and waterfront areas in the city. These areas can be used to construct public arts spaces, alfresco dining, or an iconic cultural hub that can be jointly enjoyed by the residents and visitors.

**Seamless Connection with Nearby Cities:** Hong Kong International Airport (HKIA) is connected to a number of world destinations, hence providing seamless connection to HKIA will help attract more medium to long haul visitors to Macao. Besides the SkyPier, the soon to be completed Hong Kong-Zhuhai-Macao Bridge can also be used to connect HKIA and Macao, allowing visitors to arrive in Macao directly. Furthermore, regional road infrastructure can be tapped in to improve Macao’s connectivity with nearby cities.

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

**Improvement on Pedestrian Environment:** pedestrian environment and pattern need to be upgraded to ensure a smooth circulation within the city. This will portray a quality living environment for the residents and a pleasant travelling experience for visitors.

- **Concept**
  - Introduce New Tourism Areas
  - Upgrade of Ground Transport
  - Monitor and Manage the Quality of Environment
  - Improve Access to Macao

- **Implementation**
  - Development of Potential Tourism Areas into New Tourism Spots
  - Seamless Connection with Nearby Cities
  - Expansion of Environmental Measures
  - Improvement on Pedestrian Environment
### 6. TOURISM INDUSTRY AND CITY DEVELOPMENT

#### 6.5 PLANNING PROPOSALS AND ACTION PLANS

| Planning Proposals | LAYING THE FOUNDATIONS  
*Short-Term (0 to 5 years)* | FACILITATING PRODUCTIVITY AND EFFICIENCY  
*Medium-Term (6 to 10 years)* | ACHIEVING SUSTAINABLE TOURISM GROWTH  
*Long-Term (above 10 years)* |
|---------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|
| **P 4.1** Development of Potential Tourism Areas into New Tourism Spots | • P 4.1.1 Redevelopment of Lychee Bowl Area  
• P 4.1.2 Continual support on valuable historic buildings for development use or renovation | • P 4.1.3 Redevelopment of Inner Harbour area | • 4.1.4 Proper utilisation of New Reclamation Areas |
| **P 4.2** Seamless Connection with Nearby Cities | • P 4.2.1 To have a seamless connection with Hong Kong International Airport (HKIA)  
• P 4.2.2 Enhance linkage among the airports in the region | • P 4.2.3 Establish connection between Macao with the regional railway network | |
| **P 4.3** Expansion of Environmental Measures | • P 4.3.1 Expansion on “Green Hotel Award”  
• P 4.3.2 To raise environmental standards for vehicles (including tourism industry) | • P 4.3.3 Advancement on green architectural regulations and practice codes for hotels and tourism related industries | |
| **P 4.4** Improvement of Pedestrian Environment | • P 4.4.1 Improvement of pedestrian environment  
• P 4.4.2 Adoption of digital signage system | | |
## 6. TOURISM INDUSTRY AND CITY DEVELOPMENT

### 6.5 PLANNING PROPOSALS AND ACTION PLANS

#### P 4.1 Development of Potential Tourism Areas into New Tourism Spots | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>P 4.1.1</td>
<td>Redevelopment of Lychee Bowl Area</td>
<td>• To conduct a cultural relics assessment and planning for the Lychee Bowl Area’s ship-building industrial heritage site.</td>
<td>• Base on the cultural relics assessment of the Lychee Bowl Area, propose a regeneration plan for its possible positioning, schemes for redevelopment, etc.</td>
<td>Cultural and Planning areas</td>
</tr>
</tbody>
</table>
| P 4.1.2 | Continual support on valuable historic buildings for development use or renovation | • In accordance to the “Law of Cultural Heritage and Protection” in Macao, to continue on the development of adaptive reuse plan for government-owned historic buildings. To encourage private owners to participate in an adaptive reuse plan as to balance preservation and reuse of historic buildings. | • In accordance to the “Law of Cultural Heritage and Protection”, to provide renovation support and assistance for the historic buildings in the Historic Center of Macao.  
• In accordance to the “Law of Cultural Heritage and Protection”, to initiate cooperation plan with privately-owned historic buildings so as to conserve, restore and revitalise the historic assets.  
• In accordance to the incentive and support stated in the “Law of Cultural Heritage and Protection”, this can help to promote the protection of buildings with heritage value. | Cultural area               |
### Development of Potential Tourism Areas into New Tourism Spots | Medium-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P.4.1.3 | Redevelopment of Inner Harbour area | • In line with the community’s development direction, to provide improvement measures in line and recommendations to guide the economic development of the community.  
• To revive the vibrancy of the Inner Harbor Area in the olden days by transforming the area into a vibrant waterfront with retail, alfresco dining and commerce. This redevelopment project is also seen as an opportunity to solve the flooding and congestion issues of the area, which has to be in line with the current urban regeneration plan. | • To conduct a baseline analysis and feasibility study, such as the use of historical stories of the area, and whether the current infrastructure can support the proposed transformation in the area.  
• To discuss with the stakeholders on the possible redevelopment schemes so as to solicit feedback and suggestions from the residents.  
• Refine and finalise the redevelopment plan, and put into practice.  
• Identify appropriate operating model, maintenance plan, and promotional plan. | Macao SAR Government |
### Development of Potential Tourism Areas into New Tourism Spots | Long-Term Action Plans

<table>
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<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 4.1.4 | Proper Utilisation of New Reclamation Areas  | • Make full use of the opportunity of New Reclamation Areas development to reshape Macao’s tourism image and reorganise Macao’s tourism industry distribution. To provide a diverse range of tourism products for different target visitors, a variety of programmes for the tourism areas, such as cultural, entertainment and leisure purposes. | • To confirm the land area available for tourism development in the New Reclamation Areas.  
• To conduct conceptual planning on its distribution for all the new tourism facilities.                                                                                                                             | Planning and Tourism areas       |
### Seamless Connection with Nearby Cities | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 4.2.1 | **To have a seamless connection with Hong Kong International Airport (HKIA)** | • Direct bonded road link between Hong Kong International Airport (HKIA) and Hong Kong-Zhuhai-Macao Bridge (HZMB) for passengers transiting to Macao.  
• To build passenger checking facilities (e.g. air ticket checking, baggage check facilities) at Macao Boundary Crossing Facilities for flight takers departing from Macao to HKIA. This will simplify the procedures for boarding and provide a convenient experience with visitors arriving into Macao via HKIA. | • High Level Government Meeting between MSAR and HKSAR governments to discuss the possibility to have seamless connectivity from HKIA to Macao | Macao SAR Government |
| P 4.2.2 | **Enhance linkage among the airports in the region** | • Further enhance the connection between Hong Kong, Macao and Zhuhai airports via the HZMB; while connections with Shenzhen Baoan Airport and Guangzhou Baiyun International Airport will need to be maintained. | • To discuss with local governments on the possibility to have seamless connectivity among airports in the region (via sea or by road transport). | Macao SAR Government |
### Seamless Connection with Nearby Cities | Medium-Term Action Plans

<table>
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<tr>
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<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 4.2.3 | Establish connection between Macao with the regional railway network         | • Connect Macao with the Pearl River Delta and other mainland cities through high speed railway networks.            | • Expedite the construction and execution of the Guangdong-Macao New Channel.  
• To discuss with Mainland Government on the direct access between the New Channel and the regional high speed railway in Zhuhai. | Macao SAR Government                |

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## 6. TOURISM INDUSTRY AND CITY DEVELOPMENT
### 6.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 4.3.1 | **Expansion on “Green Hotel Award”**                  | • To continue the hosting of the “Green Hotel Award”. To encourage the hotel industry in implementing the environmental protection measures as part of their corporate social responsibilities.  
  • To encourage more hotels to participate in the “Green Hotel Award”. | • To continuously optimise the assessment criteria for the “Green Hotel Award”, such as reductions in energy consumption, water consumption, food waste and waste disposal. To solicit opinions from related government departments and the industry so as to enhance its fairness and acceptance.  
  • To strengthen the promotion of the “Green Hotel Award” so that the residents and visitors can have a better understanding; and to encourage to stay in the awarded hotels. | Environmental Protection area                                      |
| P 4.3.2 | **To raise environmental standards for vehicles (including tourism industry)** | • The use of electrical, natural gas and hybrid vehicles to minimise air pollution hazard.  
  • To phase out high-polluting vehicles. | • Promotion of Electric Vehicles.  
  • Smoky vehicle control programme and spotter training.  
  • Encourage green and low-carbon transport technologies.  
  • Phasing out environmentally-unfavorable vehicles.  
  • Regular Review of emission standards. | Environmental Protection and Transport areas                              |
### 6. TOURISM INDUSTRY AND CITY DEVELOPMENT

#### 6.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
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<th>No.</th>
<th>P 4.3.3</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
|      |         | Advancement on green architectural regulations and practice codes for hotels and tourism related industries | • To promote green building design and to adopt the latest green innovation technology in the design of tourism facilities and hotels. | • To encourage and promote the tourism industry to use green architectural elements in new construction projects.  
• To optimise the relevant environment guidelines as a reference for the tourism industries. | Environmental Protection and Public Works areas |
### P 4.4 Improvement of Pedestrian and Vehicle Environment | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>P 4.4.1</td>
<td>Improvement of pedestrian environment</td>
<td>• To adopt barrier-free pedestrian environment and to improve the overall connectivity of roads&lt;br&gt;• To assess the expansion of existing and introduction of new pedestrian-only streets</td>
<td>• Establishment of a fully accessible and barrier-free walking system to shorten the distance and commuting time of the residents and visitors&lt;br&gt;• Continually optimise the walking environment from core tourism areas expanding towards its vicinity in different phases.&lt;br&gt;• To improve on community amenities and to assess the barrier-free pedestrian facilities as a way to provide convenience to the residents and tourists.&lt;br&gt;• To perpetually expand or introduce more pedestrian-only streets through walking system and street enhancement. This will improve the overall connectivity and quality of the walking environment, while energizing the local economy.</td>
<td>Civil Municipal, Public Works and Transport areas</td>
</tr>
<tr>
<td>P 4.4.2</td>
<td>Adoption of digital signage system</td>
<td>• To carry out the comprehensive wayfinding digital signage system will direct visitors and residents to destinations. The interactive information presented on the digital signage can provide all kinds of tourist information.</td>
<td>• Implementation of digital signage in suitable areas and areas with sufficient conditions.</td>
<td>Tourism and Civil Municipal areas</td>
</tr>
</tbody>
</table>
CHAPTER 7
TOURISM CARRYING CAPACITY
7. TOURISM CARRYING CAPACITY
7.1 INTRODUCTION

Tourism Carrying Capacity refers to the optimal number of visitors that an area can accommodate without harming the environment and residents’ quality of life, while still providing visitor satisfaction. Failing to address these capacity problems could limit a city’s ability to receive and accommodate visitors; cause congestion; affect the visitors’ experience and the residents’ quality of life. Managing the tourism carrying capacity should be a featured part of the long-term tourism planning strategies and development.

In this chapter, the analysis of Macao’s tourism carrying capacity was based on three main criteria: physical carrying capacity (tourism infrastructure, transportation, accommodation, etc.), social carrying capacity (residents’ and visitors’ satisfaction) and environmental capacity which determine Macao’s ability to cater to the increasing amount of visitors. Taking into consideration the Institute for Tourism Studies (IFT) reports on Tourism Carrying Capacity, the current situation, and capacity forecast for Macao—together with opinions gathered from the public consultation—specific planning proposals and action plans are recommended in this chapter aiming to improve the city’s carrying capacity for future tourism growth.

As a world-class visitor destination, it is essential to have plenty of accommodation options, tourism products, and service facilities to deliver outstanding services and provide unique experiences, to build a reputation as a global travel and leisure destination. The Macao SAR is a relatively small geographic area with a dense population and a high economic value of tourism. With limited land and natural resources, concerns have arisen over Macao’s carrying capacity on the growing tourism activities. With efficient management, Macao’s tourism development can ensure the city’s ability to receive and accommodate all visitors with appropriate, appealing facilities and pleasant environment; thereby achieving its vision of being a “World Centre of Tourism and Leisure”.

This chapter includes the following:
7.1 Introduction
7.2 Analysis of Existing Conditions
7.3 Scenario Assessment
7.4 Key Objective and Strategies
7.5 Planning Proposals and Action Plans
7. TOURISM CARRYING CAPACITY

7.2 ANALYSIS OF EXISTING CONDITIONS

7.2.1 SOCIAL CARRYING CAPACITY – REVIEW OF IFT REPORTS ON “MACAO TOURISM CARRYING CAPACITY STUDY”

Key Highlights of the “Macao Tourism Carrying Capacity Study” Report

The Institute for Tourism Studies (IFT) was first commissioned by the Secretariat for Social Affairs and Culture in 2003 to conduct the annual Tourism Carrying Capacity (TCC) study. The objective of the study is to determine the optimum number of visitors that Macao can receive per day. Based on the concept of social carrying capacity (SCC), which uses subjective measures perceived and experienced by residents and visitors, to assess the optimal capacity to receive visitors each day; and assess whether the key tourism infrastructure and physical facilities are sufficient to accommodate increasing amount of visitors.

IFT adopts two study approaches for determining the optimum number of visitors that Macao can receive:

1. Social Carrying Capacity (SCC): the use of subjective measures perceived and experienced by residents and visitors.

2. Physical Carrying Capacity (PCC): assessing the actual capacity of key tourism infrastructure and services.

The TCC is estimated largely based on surveys of residents and visitors during busy and slow times (SCC approach). Report results show that the TCC has increased over time in a stable manner as new facilities have been added and residents’ acceptance of visitors has increased, while a leveling off was shown in 2014 which is likely due to the deterioration in residents’ quality of daily life and visitors’ travel experiences caused by continued tourism growth. Thus it is likely that both residents and visitors perceive an overall deterioration in overall conditions.

Table 7.1: TCC Estimates vs. Actual Visitor Arrivals (2013, 2014)

<table>
<thead>
<tr>
<th>Year</th>
<th>Carrying Capacity (Visitors per day)</th>
<th>Annualised Capacity (Visitors per year, in millions)</th>
<th>Actual Visitor Arrivals in Macao</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>89,374 to 92,325</td>
<td>32.62 to 33.70</td>
<td>31,525,632</td>
</tr>
<tr>
<td>2013</td>
<td>87,573 to 94,956</td>
<td>31.96 to 34.66</td>
<td>29,324,822</td>
</tr>
</tbody>
</table>

Although the annualised capacity appears reasonable, the peak and busy visitor days are above the carrying capacity. As presented in table 7.2, visitor arrivals exceeded the estimated optimum carrying capacity (at 92,325) 115 days in 2014. In the future, it is recommended that measures be taken to moderate the visitor numbers in peak days, so as to distribute the visitor numbers more evenly.

The IFT TCC study is only an annual assessment, and does not forecast the TCC in the future.

Table 7.2: Visitor Arrival Pattern (2014)

<table>
<thead>
<tr>
<th></th>
<th>Days</th>
<th>Low</th>
<th>Average</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak Days</td>
<td>15</td>
<td>115,000</td>
<td>127,000</td>
<td>152,000</td>
</tr>
<tr>
<td>Busy Days</td>
<td>100</td>
<td>91,000</td>
<td>100,000</td>
<td>115,000</td>
</tr>
<tr>
<td>Normal Days</td>
<td>250</td>
<td>52,000</td>
<td>79,000</td>
<td>91,000</td>
</tr>
<tr>
<td>Total Arrivals</td>
<td></td>
<td></td>
<td></td>
<td>31,500,000</td>
</tr>
</tbody>
</table>

The study has also assessed the capacities of existing tourism infrastructures and services (PCC approach):

- Ferry services, inbound tour operating services and border facilities are able to handle increased visitor numbers with current and augmented capacity.
- Hotel room supply maybe inadequate particular during peak travel periods, but additional accommodations are currently in development.
- The physical capacities of transportation, especially taxis and public buses, remain strenuous with increased usage of visitors.
- Service capacities of Macao’s major visitor attractions and restaurants and dining establishments are insufficient to meet occasional high demand.
Perception of Visitors and Residents on Macao Carrying Capacity

In order to gain insights from visitors and Macao residents upon the topics of Macao’s tourism and its tourism carrying capacity, two sets of visitor survey and one set of resident survey were conducted to collect opinions and feedback.

Visitors Survey

- The survey result indicates an acceptable level of visitor satisfaction in all six major tourism areas, with the transportation system presented as the greatest concern, especially on the difficulty to hail a taxi.
- Satisfaction level of crowdedness at tourist attractions is also low which indicates the problem of overcrowding tourist attractions in Macao. Moreover, table 7.3 shows that busy periods (February) have certain impacts on visitors’ perception in terms of the level of crowdedness at tourist attractions, where an obvious drop in satisfaction level is experienced.

Residents Survey

- Local residents generally consider Macao as capable of providing adequate infrastructure and services for the current tourism demands, except for the transportation facilities which is considered as having insufficient carrying capacity and improvement is needed in this area.
- The open-ended responses from the residents are largely on the concerns that Macao’s congestion problems on roads and public transports such as bus and taxi are the major capacity problems.
- Residents present that there is a strong need for Macao to diversify tourist attractions and resolve the overcrowding problem at sites in order to enhance Macao’s tourism carrying capacity to accommodate more visitors in the future.

Source: Project Team
According to the “Macao Tourism Carrying Capacity (TCC) Study” reports from the Institute for Tourism Studies (IFT) and the visitors' and residents' surveys carried out by the Project Team, tourism site crowdedness is one major capacity problem. The occurrence of site crowdedness represents that the area has exceeded its capacity to handle incoming visitors which will affect quality of daily life and travel experience.

Based on the interviews with government departments and site studies, three major tourism areas are identified in Macao which are currently overcrowding and the potential sites with congestion problems in the future:

- Senado Square – Ruins of St. Paul’s District
- A-Ma Temple – Maritime Museum District (Potential)
- Taipa Downtown District & Taipa Houses (Potential)

The combination of large visitor volume, high population density and lacking open spaces have caused Senado Square - Ruins of St. Paul’s District overflowing with people. As visitor arrivals expected to increase overtime associated with further tourism development, the A-Ma Temple - Maritime Museum District, Taipa Downtown & Taipa Houses with popular attractions are potential areas to be receiving more visitor traffic in the future and be overcrowded.

**Current Crowd Control Practices in Macao:**

Some crowd control approaches have been put into effect by the Macao SAR Government to relieve overcrowding at tourist attraction sites which include the following:

- Added tourism signage which gives clear direction to visitors in order to reduce congestion by smoothing visitor flows.
- Tourism police officers deployed in some major tourism hotspots such as Senado Square, Ruins of St. Paul’s, A-Ma Temple and Lotus Square, etc. to deal with tourism events, prevent crime, as well as relieving congestion.
- A three-level crowd control policy is in place. Movement will be restricted in case of overcrowding to relieve congestion on-site.

These strategies mainly focus on controlling crowding problems; strategies and practices to prevent overcrowding are suggested to fully address the problems.
Forecasting in tourism is an important component of the planning purpose by providing awareness and support to the future development, it gives key indicators on the development direction. The Master Plan has conducted a thorough forecasting process with the intention to give a range of possible scenarios and targets for consideration. Based on these scenarios and assumptions, total visitor arrivals, tourism-related employment, visitor non-gaming expenditure, hotel rooms, retail and dining space, attendance at paid entertainment facilities and programmes for future growth can be measured. For estimation methodologies of the two visitor-growth scenarios, please refer to the “Tourism Carrying Capacity” chapter.

The two scenarios include:

1. Low-Growth Scenario, where the growth in visitor arrivals is relatively low compared to historic norms (1%-2% visitor growth per annum).
2. Modest-Growth Scenario, where visitor arrivals have moderate growth (3%-5% visitor growth per annum).

The following table summarises the key projections for the tourism performance in Macao under two growth scenarios until 2025. The key suggestions are that Macao will be attracting more overnight visitors and welcoming a longer visitor length of stay as a result of more aggressive marketing campaigns, greater development of tourism products and increasing supply of hotels and resorts.

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>Low Visitor Growth Scenario Year 2025 estimate</th>
<th>Modest Visitor Growth Scenario Year 2025 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Visitor Arrivals</td>
<td>30.9 million</td>
<td>33 to 35 million</td>
<td>38 to 40 million</td>
</tr>
<tr>
<td>Tourism-Related Employment</td>
<td>242,000</td>
<td>258,000</td>
<td>295,000</td>
</tr>
<tr>
<td>Visitor Non-Gaming Expenditure</td>
<td>USD 6.6 billion</td>
<td>USD 12 to 13 billion</td>
<td>USD 13 to 14 billion</td>
</tr>
<tr>
<td>Average Length of Stay of Overnight Stay Visitors (in days)</td>
<td>2.1 Days</td>
<td>2.3 Days</td>
<td>2.3 Days</td>
</tr>
<tr>
<td>Percentage of Overnight Stay</td>
<td>50.7%</td>
<td>56%</td>
<td>53%</td>
</tr>
</tbody>
</table>

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

Remarks: Estimation of this planning proposal is based on the 2015 figure.

Source: Statistics and Census Service; Project Team
### 7. TOURISM CARRYING CAPACITY

#### 7.2 ANALYSIS OF EXISTING CONDITIONS

#### 7.2.4 PHYSICAL CARRYING CAPACITY – FORECAST ON CAPACITY REQUIREMENT

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>Low Visitor Growth Scenario Year 2025 estimate</th>
<th>Modest Visitor Growth Scenario Year 2025 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel Average Occupancy Rate</td>
<td>83%</td>
<td>82%</td>
<td>84%</td>
</tr>
<tr>
<td>Hotel Rooms</td>
<td>37,634</td>
<td>48,600</td>
<td>51,900</td>
</tr>
<tr>
<td>Attendance at Paid Entertainment Facilities and Programmes</td>
<td>2.9 million (2015 Estimate)</td>
<td>9.0 million</td>
<td>9.9 million</td>
</tr>
<tr>
<td>Supportable Retail Space for Visitors (GFA)</td>
<td>631,000 SQM (2015 Estimate)</td>
<td>866,000 SQM</td>
<td>993,000 SQM</td>
</tr>
<tr>
<td>Supportable Dining Space for Visitor (GFA)</td>
<td>334,000 SQM (2015 Estimate)</td>
<td>416,000 SQM</td>
<td>477,000 SQM</td>
</tr>
<tr>
<td>Land Requirement (GFA)</td>
<td>466,000 SQM (2015 Estimate)</td>
<td>3.67 million SQM</td>
<td>4.17 million SQM</td>
</tr>
</tbody>
</table>

Remarks: Estimation of this planning proposal is based on the 2015 figure.

Source: Statistics and Census Service, Project Team
7. TOURISM CARRYING CAPACITY

7.2 ANALYSIS OF EXISTING CONDITIONS

7.2.5 PHYSICAL CARRYING CAPACITY – TRANSPORTATION CAPACITY

According to the social carrying capacity study, transportation has been identified as a key capacity constraint for the future tourism development in Macao. A comprehensive assessment on the recent and future situation has been conducted on the transportation system in Macao, taking consideration of new infrastructure development. The study has covered several areas including border points, connecting transportation services, and ground transportations, which are not limited to visitors but apply to all border and transport users. The following are the new infrastructures and their expected completion time:

- Hong Kong – Zhuhai – Macao Bridge (expected to achieve readiness for commissioning by end of 2017)
- Guangdong-Macao New Channel (expected to open in 2019)
- Expansion of Cotai Checkpoint (assumed to be in place by 2025)
- Light Rapid Transit System (LRT) (assumed Taipa Line opening in 2019 and future extension to Macao Peninsular)
- Expansion of Macau International Airport (Phase 3 expansion is expected to complete by 2040)

The following table summarises the key projections of the transportation system in Macao:

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>Low Visitor Growth Scenario Year 2025 estimate</th>
<th>Modest Visitor Growth Scenario Year 2025 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ferry Capacity</td>
<td>Outer Harbour:</td>
<td>Outer Harbour:</td>
<td>Outer Harbour:</td>
</tr>
<tr>
<td>(Assuming ferry service frequency remains the same)</td>
<td>V/C = 0.9-1.5 peak hours, average day</td>
<td>V/C &lt; 0.9 peak hours, average day</td>
<td>V/C &lt; 0.9 peak hours, average day</td>
</tr>
<tr>
<td></td>
<td>V/C ≥ 1.5 peak hours, high visitation day</td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
</tr>
<tr>
<td></td>
<td>Taipa Provisional Ferry Terminal:</td>
<td>Taipa Ferry Terminal:</td>
<td>Taipa Ferry Terminal:</td>
</tr>
<tr>
<td></td>
<td>V/C = 0.9-1.5 peak hours, average day</td>
<td>V/C ≥ 1.5 peak hours, average day</td>
<td>V/C ≥ 1.5 peak hours, average day</td>
</tr>
<tr>
<td></td>
<td>V/C ≥ 1.5 peak hours, high visitation day</td>
<td>V/C ≥ 1.5 peak hours, high visitation day</td>
<td>V/C ≥ 1.5 peak hours, high visitation day</td>
</tr>
<tr>
<td></td>
<td>Outer Harbour, Taipa Provisional Ferry Terminal, Airport:</td>
<td>Other border points:</td>
<td>Other border points:</td>
</tr>
<tr>
<td></td>
<td>V/C &lt; 0.9 peak hours, average day</td>
<td>V/C &lt; 0.9 at all times</td>
<td>V/C &lt; 0.9 at all times</td>
</tr>
<tr>
<td></td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
</tr>
<tr>
<td></td>
<td>Other border points:</td>
<td>Other border points:</td>
<td>Other border points:</td>
</tr>
<tr>
<td></td>
<td>V/C &lt; 0.9 at all times</td>
<td>V/C &lt; 0.9 at all times</td>
<td>V/C &lt; 0.9 at all times</td>
</tr>
</tbody>
</table>

* V/C (Volume-to-Capacity ratio): Acceptable Condition (below 0.9), Concern (0.9-1.5), Unacceptable Condition (1.5 or above)

Source: Project Team
7. TOURISM CARRYING CAPACITY

7.2 ANALYSIS OF EXISTING CONDITIONS

7.2.5 PHYSICAL CARRYING CAPACITY – TRANSPORTATION CAPACITY

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>Low Visitor Growth Scenario Year 2025 estimate</th>
<th>Modest Visitor Growth Scenario Year 2025 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Bus Services at Border Points</strong></td>
<td><strong>Border Gate:</strong> V/C = 0.9-1.5 peak hours, average day</td>
<td><strong>Cotai Checkpoint:</strong> V/C = 0.9-1.5 peak hours, average day</td>
<td><strong>Cotai Checkpoint:</strong> V/C = 0.9-1.5 peak hours, average day</td>
</tr>
<tr>
<td></td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
</tr>
<tr>
<td></td>
<td><strong>Other border points:</strong> V/C &lt; 0.9 at all times</td>
<td><strong>Other border points:</strong> V/C &lt; 0.9 at all times</td>
<td><strong>Other border points:</strong> V/C &lt; 0.9 at all times</td>
</tr>
<tr>
<td><strong>Taxi Services at Border Points</strong></td>
<td><strong>All border points:</strong> V/C &lt; 0.9 at all times</td>
<td><strong>All border points:</strong> V/C &lt; 0.9 at all times</td>
<td><strong>All border points:</strong> V/C &lt; 0.9 at all times</td>
</tr>
<tr>
<td><strong>Hotel Shuttle Services at Border Points</strong></td>
<td><strong>All border points:</strong> V/C &lt; 0.9 at all times</td>
<td><strong>Cotai Checkpoint:</strong> V/C = 0.9-1.5 peak hours, average day</td>
<td><strong>Cotai Checkpoint:</strong> V/C = 0.9-1.5 peak hours, average day</td>
</tr>
<tr>
<td></td>
<td></td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
<td>V/C = 0.9-1.5 peak hours, high visitation day</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Other border points:</strong> V/C &lt; 0.9 at all times</td>
<td><strong>Other border points:</strong> V/C &lt; 0.9 at all times</td>
</tr>
</tbody>
</table>

* V/C (Volume-to-Capacity ratio): Acceptable Condition (below 0.9), Concern (0.9-1.5), Unacceptable Condition (1.5 or above)

Based on the detailed analysis, some key transportation issues have been found:

- The ferry services accessing Macao are experiencing a problem of capacity overloading, passengers will need to adjust travel time during peak hours.
- Although the overall taxi supply is able to meet passenger demands at border points during peak hours. However, the expected actual situation could be worse because it is subject to intangible factors, including drivers’ reluctance to serve congested areas, flexible service hours of taxis, and actual dispersion of taxi supply in different areas.
- The public bus connecting service at some busy border points are insufficient to accommodate high demands where an moderate expansion on the capacity is required.
- Hotel shuttle services are over-provided at some border points during off-peak periods, leading to potential congestion at major pick-up/drop-off points.
- Following the increasing visitor arrivals to Macao in the future, the customs, immigration and quarantine facilities in some border points will be over capacity; proper expansion on the e-channels in both departure and arrival halls is recommended.
- Workers who do not live in Macao are frequent border-crossers as they commute to Macao daily, which exerts pressure on the immigration checkpoints and border crossing transportation.

Source: Project Team
Tourism is a consumptive industry where it needs different kinds of natural resources to support the operations. Power and water are the two major resources to be consumed in the industry.

**Power Consumption and Carbon Emission**

Currently there is no specific assessment on tourism related power consumption and carbon emission in Macao. Taking reference of the report “Analysis of Economic Development and CO2 Emission in Macao SAR”, it is found that Service Industry, including Hotel and Catering Sector, Gaming Sector and the Transportation Sector are the largest power consumers in Macao (chart 7.2), which also account for the greatest proportion of carbon emission in Macao.

The report has developed four future scenarios and indicated that effective power saving policies and practices are needed for Macao to slow down the rate of power consumption and carbon emission. Since tourism industry is the largest consumer to power in Macao, special attention should be paid on the environmental approaches in the industry in order to achieve an effective reduction in power and carbon emission.

**Water Consumption**

Projection has been made to understand the level of water consumption in the tourism industry under two visitor growth scenarios. As indicated in chart 7.3, tourism related water consumption only accounts for an insignificant amount compared to Macao as a whole, which suggests that tourism development will have little impacts to the environmental carrying capacity in terms of water usage. Macao should continue the water saving approaches in the industry in order to maintain the water usage in an acceptable level.

Source: Institute of Energy, Environment and Economy of Tsinghua University and Tsinghua Innovation Center in Dongguan: “Analysis of Economic Development and CO2 Emission in Macao SAR Report”, 2015; Project Team
7. TOURISM CARRYING CAPACITY

7.2 ANALYSIS OF EXISTING CONDITIONS

7.2.7 ENVIRONMENTAL CARRYING CAPACITY – TOURISM GENERATED WASTE AND WASTEWATER

Waste generation is one common environmental problem caused by tourism development. Problem of excessive waste can severely affect the environment; therefore, proper understanding and management on waste situation is vital.

Solid Waste

Since solid waste in Macao is mainly treated via the incineration process at Macau Refuse Incineration Center (MRIP), the handling capacity of solid waste in Macao can be measured with the treatment capacity of MRIP.

It can be seen from chart 7.4 that the amount of solid waste generated by tourism will have insignificant impact on MRIP’s treatment capacity in short to long run. MRIP will have adequate treatment capacity to handle excess solid waste generated from greater tourism growth in the near future. The expansion work of the MRIP will further increase its handling capacity.

Although solid waste generation level in tourism is in an acceptable level, the recycling trend in Macao is unsatisfactory with a constant rate at only 18-20%. The tourism industry is encouraged to promote a more proactive waste recycling programme, in order to elevate Macao’s recycling practices and develop Macao as an environmentally-friendly destination.

Wastewater

Macao currently has five Wastewater Treatment Plants (WWTP) while the Macao Peninsular WWTP, Taipa WWTP and Colaee WWTP treat the majority of wastewater in Macao. As indicated in chart 7.5, tourism wastewater only account for a smaller amount compared with the domestic wastewater, which indicates a minor impact of tourism to the wastewater system in Macao. Although Macao Peninsular WWTP will have insufficient capacity in the near future, a new WWTP is under planning at the artificial island of the Hong Kong-Zhuhai-Macao Bridge, which will share the wastewater generated by Macao Peninsular and New Town Zone A and B, and relieve the capacity burden of the Macao Peninsular WWTP.

Source: Project Team

<table>
<thead>
<tr>
<th>Chart: 7.4: Forecast on Volume of Tourism Solid Waste Treated in MRIP in Macao (tonnes/ day)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td>500</td>
</tr>
<tr>
<td>1,000</td>
</tr>
<tr>
<td>1,500</td>
</tr>
<tr>
<td>2,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chart: 7.5: Forecast on Volume of Wastewater Treated in Wastewater Treatment Plants in Macao (m³/ day)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2025 Low Growth</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td>50,000</td>
</tr>
<tr>
<td>100,000</td>
</tr>
<tr>
<td>150,000</td>
</tr>
<tr>
<td>200,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Macao Peninsular WWTP</th>
<th>Taipa WWTP</th>
<th>Coloane WWTP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Capacity</td>
<td>Domestic</td>
<td>Tourism</td>
</tr>
<tr>
<td>2025 Low Growth</td>
<td>2025 Modest Growth</td>
<td>2025 Low Growth</td>
</tr>
</tbody>
</table>
7. TOURISM CARRYING CAPACITY

7.3 SCENARIO ASSESSMENT

- The IFT Tourism Carrying Capacity (TCC) report covers both social and physical carrying capacity, and finds transportation and crowded tourist attractions as the major capacity issues.
- Transportation issues (getting a taxi, bus crowding and road congestion) and the tourist attractions crowding problem during peak days are the main problems. Therefore, the carrying capacity of transportation and tourist attractions are the key issues to concern.
- Labours who live outside of Macao commute to Macao daily, which cause congestion at border checkpoints and transportation.
- The Environmental Carrying Capacity assessment indicates an acceptable level of environment capacity while Macao’s solid waste recycling rate is relatively low, with increasing visitor arrivals, amount of both solid waste and wastewater generated by tourism is expected to increase.

- Forecasts were prepared based on two scenarios until 2025.
- The Light Rapid Transit System (LRT) is a backbone of the Macao transportation network and can critically reduce congestion; LRT to all border points is required.
- The completion of Hong Kong-Zhuhai-Macao Bridge will relieve congestion at ferry terminals.
- Suggest shifting more border crossings from Border Gate to Cotai Checkpoint to reduce congestion and the problem of traffic congestion between Macao and Cotai.
- Taxi service needs substantial expansion and upgrading.
- Solid waste recycling and optimising waste treatment facilities should be encouraged.

- Public are concerned about increasing visitation and express that Macao already has too many visitors, adverse impacts to residents and visitors could increase with more visitors.
- Macao should continue the development of infrastructure, improve and expand the transportation and optimise border crossings.
- Build new attractions and shopping areas away from the core area and promote other districts of the city can reduce site crowdedness problem.
- Waste recycling and reduction practices should be expanded in Macao.
The key objective is to **manage Macao’s tourism carrying capacity** to enhance its ability to receive visitors, and minimise the negative impacts to residents, visitors and the environment.

A key directive to relieve carrying capacity is “to manage”, it is needed to actively understand the situation of tourism carrying capacity, direct policies and resources to address and resolve the problems. In the future, it is necessary to actively manage tourism to reach the desired outcomes.

This key objective will be realised by the implementation of six key strategies:

- **Monitor Macao’s Tourism Carrying Capacity**: a key to improvement is to first measure, set goals, and monitor progress.
- **Redistribute Peak Travel Demand**: reduce peak demand in terms of arrivals to Macao, as well as crowded locations in Macao.
- **Relieve the Problem of Tourist Attractions Crowdedness**: identify the tourist attraction areas of key concern, prepare site management plans and develop effective measures to address crowdedness and safety concerns.
- **Address the Issues of Transportation Carrying Capacity**: high-priority policies are needed to address transportation issues in the short-, medium-, and long-term.
- **Enhance and Expand Human Resources**: sufficient and high quality human resources are a critical requirement for a quality tourism industry.
- **Reduce Environmental Impacts Caused by Tourism**: encourage more environmentally friendly measures in the tourism industry so to reduce possible negative impacts on the environment.

Some of these objectives overlap with the objectives found in other chapters, which highlights the importance of carrying capacity management in tourism.
A key to improve carrying capacity is to first measure, set goals, and then monitor progress. The carrying capacity has both social and physical aspects. The Institute for Tourism Studies (IFT) has been studying the Tourism Carrying Capacity (TCC) since 2003, tracking trends and identifying concerns. “The Macao Tourism Carrying Capacity Study” will be a key resource to monitor progress. Some suggested ideas include the following:

• Continue to use IFT surveys of residents and visitors to monitor and track subjective ratings on social conditions. In particular, monitor ratings on site crowdedness, taxi availability, service quality and traffic conditions.
• Set goals and KPI for transportation system, especially on improving the rating of taxi service and traffic conditions, as well as monitoring the progress.
• Monitor low value and day tourism (i.e. tourism activities which usually generate less revenues), and set goals and KPI for reducing low value tourism.
• Set goals and KPI for the number of border points, and monitor progress made towards new facilities at Guangdong-Macao New Channel, Hong Kong-Zhuhai-Macao Bridge border crossing facilities and expansion of Macau International Airport. The completion of new border facilities will have significant contribution on expanding Macao’s tourism carrying capacity, therefore monitoring these new facilities is essential to enhance the carrying capacity.
• Monitor human resource in the tourism industry. Consider KPI such as demand of tourism related labour, percent of staff completing training courses, as well as reductions in the staff turnover rate.

A planning proposal with action plans is included in this chapter.

Image Source: Macao Government Tourism Office
A key strategy is to redistribute peak travel demand in terms of arrivals to Macao and at popular locations in Macao. Macao always has been a popular destination during holidays and during major holidays, such as the Chinese Spring Festival and Golden Week. The following are suggested:

- MGTO has actively been promoting non-peak tourism events and activities, and these should continue. Events and activities during peak holiday times should be reviewed and possibly rescheduled to off-peak season.
- MICE events particularly are useful in generating non-peak high-value travel, because events tend to occur during the work week. Therefore, MICE events should be strongly encouraged.
- The senior market is one of the target markets that has the ability to travel off-peak, and this market should be encouraged to develop.
- Within Macao, significant efforts will be required to create new tourism areas, away from the core historic district. Planning proposals call for use of the Macao waterfront and water-based tourism, to reduce pressure on the core area.
- Related departments of the Macao SAR Government has launched tourism walking trails and other methods to move people away from the core tourism area, and to use pedestrian footpaths rather than vehicles. These programmes should be enhanced with greater real time information systems.
- As Macao moves to more event and experienced-based tourism products, these can be developed and marketed off-peak, to reduce peak demand.

Redistributing peak travel demand is a concerted effort involving various tourism strategies. Many of the strategies and ideas to reduce peak demand are incorporated into other chapters of this report, including promotion of the seasonal tourism products and development of new tourist attractions away from the core tourism areas. Therefore, no specific planning proposal is prepared for this strategy in this chapter.
7. TOURISM CARRYING CAPACITY
7.4 KEY OBJECTIVE AND STRATEGIES
7.4.3 STRATEGY 3: RELIEVE THE PROBLEM OF TOURIST ATTRACTIONS CROWDEDNESS

A key strategy to relieve the problem of tourist attractions crowdedness and relative safety issues is to identify key areas of concern and consider effective management plans and measures to ease the flow of visitors. The Historic Centre of Macao was inscribed on the UNESCO World Heritage List, therefore proper management of the world heritage sites is fundamental. The “Protection and Management Plan of the Historic Centre of Macao” is preparing by the Cultural Affairs Bureau (ICM). The Protection and Management Plan largely focuses on the physical development of the district, thus addressing concerns on the sites’ carrying capacity is recommended.

In relation to carry capacity, some potential ideas include the following:

- Estimate suitable crowd density and capacity for areas/plazas/sidewalks.
- Review pedestrian and vehicle circulation, and emergency access routes.
- Increase visitor service facilities, such as toilets, trash collection, and signage.
- Conduct an assessment of current security systems, threats and vulnerabilities, and design responsive approaches.
- Encourage off-peak time activities.

Site management plan is suggested to apply to all the crowded tourism areas in Macao to address crowd management issues. Meanwhile, effective approaches to reduce peak travel demand at tourism hotspots should also be considered. For the long-term approaches to relieve site crowdedness, developing new tourism attractions away from the core area is suggested to distribute tourism demand more evenly within Macao. The proposals to introduce new tourism products and expand tourism areas are incorporated in the chapters of “Tourism Resources and Products System” and the “Tourism Industry and City Development”.


Image Source: Macao Government Tourism Office
Addressing transportation issue is a key strategy to eliminate the constraint of tourism development and provide reasonable carrying capacity. High priority and focused policies are needed to address transportation issues in the short-, medium-, and long-term. Some suggested ideas include the following:

• Assess the adequacy of taxi licenses, drivers, and on-call taxi systems, and suggest revisions to meet the demands of both residents and visitors.
• Expand the hotel shuttle bus sharing system, to rationalise the routings and number of bus trips on the roadways.
• Improve public bus capacity with optimisation on service routing and frequency.
• Encourage the use of the Cotai Checkpoint for the Cotai workers who do not live in Macao, tour groups, and those visiting Cotai. This will reduce traffic in Macao Peninsula, the bridges, and Taipa. The intercity railway to Hengqin is expected to open in 2018, and this will provide convenient transit service direct to the Cotai Checkpoint.
• Support the continual expansion of the Light Rapid Transit System (LRT), including proposed additions to all border points. This will allow visitors and workers who do not live in Macao to travel within Macao without affecting ground transportation.
• Support the building of the fourth harbour crossing for vehicular traffic.

Planning proposal and related action plans are designed in this chapter.
7. TOURISM CARRYING CAPACITY
7.4 KEY OBJECTIVE AND STRATEGIES
7.4.5 STRATEGY 5: ENHANCE AND EXPAND HUMAN RESOURCES

Human resources are a critical requirement for a quality tourism industry. During the public consultation, there are several comments regarded upgrading the skills of the Macao workforce as well as addressed non-resident workers. The rapid growth of the tourism industry and businesses in Macao have led to high workforce participation and low unemployment rate. New investment and tourism businesses continue to require more labour.

• Continue tourism training programmes, both in universities, education institutes, as well as on the job site. Consider KPI for completion rates of training programmes for employees of all tourism-related companies.
• Consider incentive programmes for improving labour productivity, particularly for SME.
• Enhance non-resident worker training programmes, to encourage them to have better knowledge of Macao and service enhancement.

This chapter only carried out the forecast and analysis on the demand of tourism workers. Relevant planning proposals of the expansion and upgrade of tourism labour force and issues about non-resident workers were discussed in the chapter of “Tourism Quality and Service System”.

Image Source: Macao Government Tourism Office
7. TOURISM CARRYING CAPACITY

7.4 KEY OBJECTIVE AND STRATEGIES

7.4.6 STRATEGY 6: REDUCE ENVIRONMENTAL IMPACTS CAUSED BY TOURISM

For Macao to become a "World Centre of Tourism and Leisure", optimisation of environmental management is essential. There is a high expectation from visitors that the city cares for the environment and continually encourage green practices. With the fast growth of tourism industry and businesses, it is expected that water and energy consumption as well as carbon emission will increase. Meanwhile, there will be more waste generated with more tourism activities. Waste problem will adversely impact the natural environment and increase pressure to the local waste system which will degrade the quality of life and affect the attractiveness of Macao as a tourist destination. Some recommended practices to increase Macao’s environmental performance in tourism include the following:

- Advocate environmental protection measures in the industry to reduce resource consumption and carbon emissions.
- Promote high environmental standard vehicles in order to achieve reduction in energy and carbon emission in tourism transportation.
- Review the current solid waste recycling and disposal system and identify the means for optimisation.
- Encourage and expand waste recycling in all hotels and other tourism businesses by applying incentives and wide education.
- Promote public place recycling, especially in the high tourism traffic areas, to encourage visitors and tourism businesses to support and participate in recycling practices.
- Optimise wastewater handling process to ensure the stringent standard of wastewater discharged and improve waterfront environment in Macao.
- Explore the possibility of wastewater recycling to promote efficient use of natural resources and reduce environmental impacts caused by excessive wastewater discharge.

The planning proposal regarding the expansion of environmental practices in the tourism industry is addressed in the chapter of “Tourism Industry and City Development”. This chapter emphasises on the planning proposal and action plans on the management on tourism waste and wastewater.

Image Source: Macao Government Tourism Office, Macao Environmental Protection Bureau
# 7. Tourism Carrying Capacity

## 7.5 Planning Proposals and Action Plans

### 6 Strategies

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<tr>
<th>Concept</th>
<th>Implementation</th>
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<td>Monitor Macao’s Tourism Carrying Capacity</td>
<td>Design KPI for Monitoring Macao’s Tourism Carrying Capacity</td>
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<tr>
<td>Redistribute Peak Travel Demand*</td>
<td>Site Management of Crowded Tourist Attraction Areas</td>
</tr>
<tr>
<td>Relieve the Problem of Tourist Attractions Crowdedness</td>
<td>Policies for Transportation Improvements</td>
</tr>
<tr>
<td>Address the Issues of Transportation Carrying Capacity</td>
<td>Encourage Tourism Waste Reduction and Recycling</td>
</tr>
<tr>
<td>Enhance and Expand Human Resources*</td>
<td></td>
</tr>
<tr>
<td>Reduce Environmental Impacts Caused by Tourism</td>
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</tr>
</tbody>
</table>

The 6 strategies gave the conceptual ideas on achieving the key objective of manage Macao’s tourism carrying capacity, and are supported by the 4 specific planning proposals for the actual implementation with short- and medium-term action plans. (*The specific action plans supporting two of the strategies will be discussed in other relevant chapters)

**Design KPI for Monitoring Macao’s Tourism Carrying Capacity:** current and forecast carrying capacity give an indication of requirements and KPI for tourism. Annual monitoring of development progress to increase the capacity is suggested.

**Site Management of Crowded Tourist Attraction Areas:** Macao is facing over-crowding problems in some key tourism spots, which has adversely affected the experiences of both local residents and visitors. Site management plan are required to address the situation for a sustainable future.

**Policies for Transportation Improvements:** key policies are required in terms of taxis and ground transportation for the short-, medium-, and long-term implementation.

**Encourage Tourism Waste Reduction and Recycling:** in response to the continual growth in tourism, proactive approaches to reduce and recycle tourism generated waste are needed to create Macao as a more environmentally friendly destination.

Remarks: The implementation related to redistribute peak travel demand requires the effort of new product development and targeted marketing campaigns which are addressed in the chapters of “Tourism Resources and Products System” and “Tourism Branding and Marketing Strategies”. Action plans to enhance human resources are part of the focus in the chapter of “Tourism Quality and Service System”. Therefore, there are no planning proposals for these strategies in this chapter.
### 7. Tourism Carrying Capacity

#### 7.5 Planning Proposals and Action Plans

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<th>Facilitating Productivity and Efficiency (Medium-Term: 6 to 10 years)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>P5.1 Design KPI for Monitoring Macao’s Tourism Carrying Capacity</strong></td>
<td>• P5.1.1 Expand the annual Tourism Carrying Capacity (TCC) reports to include more KPIs on monitoring the carrying capacity</td>
<td></td>
</tr>
<tr>
<td><strong>P5.2 Site Management of Crowded Tourist Attraction Areas</strong></td>
<td>• P5.2.1 Augment the “Protection and Management Plan of the Historic Centre of Macao” with management measures on the tourist attractions carrying capacity</td>
<td>• P5.3.2 Implement site management plan and develop corresponding strategies for the crowded tourist attractions</td>
</tr>
<tr>
<td><strong>P5.3 Policies for Transportation Improvements</strong></td>
<td>• P5.3.1 Prepare an assessment on visitor traffic and transportation capacity at tourism hotspots</td>
<td>• P5.3.3 Effective management on tourism use vehicles</td>
</tr>
<tr>
<td></td>
<td>• P5.3.2 Implement taxi service improvement policy</td>
<td>• P5.3.4 Increase the usage rate of Cotai Checkpoint</td>
</tr>
<tr>
<td></td>
<td>• P5.3.3 Effective management on tourism use vehicles</td>
<td></td>
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<tr>
<td><strong>P5.4 Encourage Tourism Waste Reduction and Recycling</strong></td>
<td>• P5.4.1 Encourage proactive solid waste recycling in hotels</td>
<td>• P5.4.4 Upgrade and optimise the treatment process of wastewater treatment plants</td>
</tr>
</tbody>
</table>
### 7. TOURISM CARRYING CAPACITY

7.5 PLANNING PROPOSALS AND ACTION PLANS

**P 5.1** Design KPI for Monitoring Macao’s Tourism Carrying Capacity | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 5.1.1 | Expand the annual Tourism Carrying Capacity (TCC) reports to include more KPIs on monitoring the carrying capacity | • Amend the TCC Study reports prepared by IFT to include a section on monitoring carrying capacity KPIs. | • Expand the current TCC Study report covering KPIs monitoring the following.  
• KPIs on Physical Carrying Capacity could include:  
  1) Total visitor arrivals  
  2) Tourism related employment, including non-resident workers who do not live in Macao  
  3) Visitor non-gaming expenditure  
  4) Average length of stay of overnight stay visitors  
  5) Percentage of overnight stay visitors  
  6) Hotel average occupancy rate  
  7) Number of hotel rooms  
  8) Ferry capacity  
  9) Border control points capacity  
  10) Public buses capacity  
  11) Taxi capacity  
  12) Attendance for paid entertainment facilities and programmes  
  13) MICE activity (i.e. no. of events, attendees)  
• KPIs on Social Carrying Capacity could include:  
  1) Hotel and tourism labour job stress level  
  2) Subjective rating on various ground transportation modes  
  3) Perception on the level of tourist attractions crowdedness  
• Conduct KPI monitoring on other specific topics if viable and required. | Social Culture Area |
### P 5.2 Site Management of Crowded Tourist Attraction Areas | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
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<th>Description of Action Plan</th>
<th>Specific Actions</th>
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</tr>
</thead>
</table>
| 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 | • Suggest to augment the “Protection and Management Plan of the Historic Centre of Macao” to include the site carrying capacity management so to address the crowding and safety issues. | • Assess site conditions, circulation, and emergency access and adopt a universal crowding standard.  
• Set up warning systems and reacting procedures in case of overcrowding.  
• Train up the professional heritage site managers as recommended by the UNESCO on heritage site management. | Culture Area |
| P 5.2.2 | Implement site management plan and develop corresponding strategies for the crowded tourist attractions | • Develop corresponding strategies and measures targeted at the popular sites and tourist attractions. | • Evaluate the crowded condition of popular sites, identify the threats and vulnerabilities of the overcrowding problem and develop corresponding measures.  
• Implement crowd safety management measures according to the onsite situation at the tourist attractions.  
• Continue to optimise measures to divert the crowd according to the change of actual situation.  
• Opt for proper venues to organise mega-events, to avoid exerting pressure on the carrying capacity of tourist attractions. | Security Area |
### 7. TOURISM CARRYING CAPACITY

#### 7.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>No.</th>
<th>Policy</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>P 5.3.1</td>
<td>Prepare an assessment on visitor traffic and transportation capacity at tourism hotspots</td>
<td>• Assess the situation in terms of visitor traffic at tourist hotspots and develop corresponding transportation policies and measurements.</td>
<td>• Assess the visitor volume during peak travel period at busy areas, including major border points, key tourist attractions and hotel clusters. • Based on the assessment on visitor volume, evaluate the capacity and limitation of the tourist hotspots transportation system. Develop corresponding approaches to accommodate high travel demands.</td>
<td>Tourism and Transportation Areas</td>
</tr>
<tr>
<td>P 5.3.2</td>
<td>Implement taxi service improvement policy</td>
<td>• Improve taxi availability and service quality, particularly of Macao residents.</td>
<td>• Raise the standard of taxi drivers’ examination to enhance drivers’ legal awareness and service quality. • Review operations and service standard of special taxi, and adjust the licensing number to meet the market demand. • Continue the monitoring and execution of illegal taxi practices.</td>
<td>Transportation Area</td>
</tr>
</tbody>
</table>
### 7. TOURISM CARRYING CAPACITY
#### 7.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>P 5.3.3</td>
<td>Effective management on tourism use vehicles</td>
<td>• Effectively manage hotel and casino shuttle buses.</td>
<td>• Continue review and adjust the parking space and routing of hotel and casino shuttle bus, to optimise the spatial use at border points. Consider and encourage shuttle bus sharing system.</td>
<td>Transportation Area</td>
</tr>
<tr>
<td>P 5.3.4</td>
<td>Increase the usage rate of Cotai Checkpoint</td>
<td>• Develop policies to shift border crossing and traffic demand to the Cotai Checkpoint after the intercity railway to Hengqin Border is completed, so as to relieve demand pressure of other border points.</td>
<td>• Conduct a policy study on shifting border crossing demand to Cotai Checkpoint, the key potential group includes: 1) Visitors to Macao 2) Package Tours to Macao 3) Workers in Cotai, including the non-resident workers and local residents who do not live in Macao • Discuss with regional departments on the possibility of improving the facilities at Cotai Checkpoint to implement the “Cooperative Check, One Clearance” system.</td>
<td>Macao SAR Government</td>
</tr>
</tbody>
</table>
### P 5.3 Policies for Transportation Improvements | Medium-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 5.3.5 | **Support the project of Light Rapid Transit System (LRT) and the extension to all border crossing points** | • Continual policies to support the project of LRT and the extension work to all the border points. | • Continue the scientific evaluation to assess the connection of LRT with major border crossing points.  
• Discuss with the respective Chinese government departments on the connection of Macao LRT with the Mainland railway system. | Macao SAR Government |
7. TOURISM CARRYING CAPACITY
7.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>No.</th>
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<th>Respective Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>P 5.4.1</td>
<td><strong>Encourage proactive solid waste recycling in hotels</strong></td>
<td>• Expand the solid waste system and recycling facilities in the hotels in Macao.</td>
<td>• Set up a universal recycling standard for all hotels to follow and provide incentives to facilitate recycling practices and management. It could be considered as one of the criteria of achieving the “Macao Green Hotel Awards”.&lt;br&gt;• Encourage hotels to install recycling facilities and support transportation requirement for collection.</td>
<td>Environmental Protection Area</td>
</tr>
<tr>
<td>P 5.4.2</td>
<td><strong>Expand solid waste recycling system to high tourism traffic areas</strong></td>
<td>• Provide sufficient recycling bins throughout the city, especially at the high tourism traffic areas to facilitate recycling practices among visitors and local tourism businesses.</td>
<td>• Continually increase the supply of recycling bins and optimise recycling facilities in any suitable areas.&lt;br&gt;• Supply sufficient recycling bins and support the transportation requirement for collection.&lt;br&gt;• Place clear instruction on the bins to ensure correct waste segregation.&lt;br&gt;• Promote “event recycling”, by providing free bins for waste and recycling and supporting promotional material during large scale events.</td>
<td>Environmental Protection and Civil Municipal Areas</td>
</tr>
</tbody>
</table>
### 7. TO urism Carrying Capacity

#### 7.5 Planning Proposals and Action Plans

<table>
<thead>
<tr>
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<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 5.4.3 | Conduct a feasibility study on constructing a wastewater recycling plant         | • Carry out a feasibility study on constructing a wastewater recycling plant under the advisory of the "Macao Recycled Water Development Plan (2013-2020)".                        | • Carry out a feasibility study to construct a wastewater recycling plant. The study should include land use study, environmental impact assessment, cost-benefit analysis, assessment of wastewater supply and recycled water capacity. A pilot study could be encouraged.  
• Gather the public’s point of view.  
• Develop a study on the user-end water supply and consider the usage of recycled water in tourism facilities and cultural events to reduce resource consumption from tourism growth. | Water and Environmental Protection Areas                                                                                                               |
### 7. TOURISM CARRYING CAPACITY

#### 7.5 PLANNING PROPOSALS AND ACTION PLANS

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</tr>
</thead>
</table>
| P 5.4.4 | Upgrade and optimise the treatment process of wastewater treatment plants | • Upgrade and optimise the current wastewater treatment plants to improve wastewater quality and protect the natural environment. | • Conduct a feasibility study as well as an environmental impact assessment and a cost-benefit analysis on the upgrade and optimisation of existing wastewater treatment plants.  
• The study could include the suitable technology and design to be adopted for the upgrade and identification on any key issues and constraints.  
• Long-term action includes actual upgrading and construction work, continual evaluation and monitoring of performance and environmental impacts. | Environmental Protection Area |
CHAPTER 8
TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.1 INTRODUCTION

This chapter begins with an overview of smart tourism technology, and focuses on the benefits and use of technology when applied to a destination like Macao. In this chapter, there is reference to best-in-class tourism technology platforms, smart technology tools and other technologies useful for building a smart tourist destination. Many travel brands, tourism boards, hotels and tourism establishments are using technology for different reasons, these include: enhancing the travellers experience, enabling customer engagement and managing key areas of concern such as congestion and safety and security.

Macao’s tourism market is large. The use of technology can help Macao to manage the industry and enhance its visitors experience. Macao is among the top destinations in the world; its vision is to become a World Center for Tourism and Leisure. In order to achieve this vision, this study leverages on international best practices in the marketing and management of Macao using innovative technology. Innovative technology applications are able to add value to a customer’s experience and provide additional resources. Other leading destinations, such as Seoul, Dubai and London are ahead of the game by using the latest innovative technology and constantly improving the ease of tourism. Technology has the ability to take the concept of travel management to the next level. Updating current technology and deploying smart technology tools will see extended benefits for both visitors and the tourism industry of Macao in the short to long term.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.2 ANALYSIS OF EXISTING CONDITIONS

8.2.1 AVAILABLE TOURISM TECHNOLOGIES

Based on benchmark and best practice, a number of technologies are now available to the tourism industry. The applications of these technologies are useful for destination management organisations, for all businesses related to the tourism industry (such as merchants, service providers, transport providers), for hotels and visitors. Among innovative technologies, the followings are already being used in Macao for tourism marketing, management or for the industry operations:

<table>
<thead>
<tr>
<th>Innovative Technologies</th>
<th>Application level of technology (software, hardware, infrastructure) in Macao</th>
<th>Level of availability and use of this technology in Macao</th>
<th>Comment</th>
</tr>
</thead>
</table>
|                        | i) Yes = ☻  
|                        | ii) No = (blank);  
|                        | Public  
|                        | (Note 4)  
|                        | Private  
|                        | (Note 5)  
|                        |                                      |                                      |         |
| Content Management System (CMS) | ☻ | ☻ | Basic | Basic | Integration of tourism information and big data of Macao is in progress. |
| Customer Relationship Management (CRM) | ☻ | ☻ | Basic | Basic | Basic CRM system is available in public sector with the industry, but mostly supports one-way inquiry. |
| POS (Point of Sale) | ☻ | - | N/A | Advanced | Integrated resorts are using relevant technology solutions on their business operations, to carry out practices like tracking and customer management. |

Notes:
1/ Tourism marketing: the use of the system directly for tourism marketing or to enhance tourism marketing capability/capacity.
2/ Tourism management: refers to government related service functions that include: data/ content distribution/ sharing, traffic monitoring/ management that may benefit tourism related agencies or that may be used to manage specific issues like traffic, crowds, safety, etc.
3/ Tourism industry operations: technologies that available, present or used by the industry stakeholders that are either managed centrally or used for daily operations.
4/ Public: Level of use by the public sector for operations.
5/ Private: Level of use by the private sector for operations.
   i. Basic: observed or reported availability of this technology but with limited industry applications or limited number of stakeholders using the technology.
   ii. Advanced: observed or reported availability of this technology with industry/stakeholder applications; however, level of applications varies across the industry.
   iii. N/A: technology observed or reported as not applicable in the sector.

Source: Project Team
## 8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY
### 8.2 ANALYSIS OF EXISTING CONDITIONS
#### 8.2.1 AVAILABLE TOURISM TECHNOLOGIES

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</thead>
<tbody>
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<tr>
<td><strong>Tourism Marketing</strong></td>
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<td><img src="/content/yes.png" alt="Yes" /></td>
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<tr>
<td><strong>Tourism Industry Operations</strong></td>
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<td><img src="/content/yes.png" alt="Yes" /></td>
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<tr>
<td><strong>Public</strong></td>
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<td><img src="/content/yes.png" alt="Yes" /></td>
<td><img src="/content/yes.png" alt="Yes" /></td>
</tr>
<tr>
<td><strong>Private</strong></td>
<td><img src="/content/yes.png" alt="Yes" /></td>
<td><img src="/content/yes.png" alt="Yes" /></td>
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</tr>
</tbody>
</table>

Notes:

1/ Tourism marketing: the use of the system directly for tourism marketing or to enhance tourism marketing capability/capacity.
2/ Tourism management: refers to government related service functions that include: data/content distribution/sharing, traffic monitoring/management that may benefit tourism related agencies or that may be used to manage specific issues like traffic, crowds, safety, etc.
3/ Tourism industry operations: technologies that available, present or used by the industry stakeholders that are either managed centrally or used for daily operations.
4/ Public: Level of use by the public sector for operations.
5/ Private: Level of use by the private sector for operations.

i. Basic: observed or reported availability of this technology but with limited industry applications or limited number of stakeholders using the technology.
   ii. Advanced: observed or reported availability of this technology with industry/stakeholder applications; however, level of applications varies across the industry.
   iii. N/A: technology observed or reported as not applicable in the sector.

Source: Project Team
### 8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

#### 8.2 ANALYSIS OF EXISTING CONDITIONS

#### 8.2.1 AVAILABLE TOURISM TECHNOLOGIES

<table>
<thead>
<tr>
<th>Innovative Technologies</th>
<th>Application level of technology (software, hardware, infrastructure) in Macao</th>
<th>Level of availability and use of this technology in Macao</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>i) Yes = ☑ ii) No = (blank);</td>
<td>i) Basic; ii) Advanced</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tourism Marketing (Note 1)</td>
<td>Public (Note 4)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tourism Management (Note 2)</td>
<td>Private (Note 5)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tourism Industry Operations (Note 3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location based geo-referencing</td>
<td>☑</td>
<td>Advanced</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☑</td>
<td>Advanced</td>
<td>Technology is widely used.</td>
</tr>
<tr>
<td>Real-time information</td>
<td>☑</td>
<td>Advanced</td>
<td>Basic Applications are available for flights, public bus service, etc.</td>
</tr>
<tr>
<td>Digital Identity Card / E-Channel</td>
<td>☑</td>
<td>Advanced</td>
<td>N/A Available for Macao and pre-registered Hong Kong and Mainland Chinese residents.</td>
</tr>
<tr>
<td>Wi-Fi-service</td>
<td>☑</td>
<td>Advanced</td>
<td>Advanced Many public service locations are covered with Wi-Fi service.</td>
</tr>
</tbody>
</table>

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<td></td>
<td>Tourism Marketing (Note 1)</td>
<td>Tourism Management (Note 2)</td>
<td>Tourism Industry Operations (Note 3)</td>
</tr>
<tr>
<td>Bluetooth enabled services</td>
<td>☻</td>
<td>☻</td>
<td>☻</td>
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<tr>
<td>Augmented virtual reality/ mixed reality</td>
<td>☻</td>
<td></td>
<td>☻</td>
</tr>
<tr>
<td>Smart “wearable” RFID wristbands</td>
<td>☻</td>
<td>☻</td>
<td></td>
</tr>
<tr>
<td>Smart hotels – Touch Screen Automation Control</td>
<td></td>
<td>☻</td>
<td></td>
</tr>
</tbody>
</table>

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Source: Project Team
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.2 ANALYSIS OF EXISTING CONDITIONS

8.2.2 INTERNET /BROADBAND BASED TECHNOLOGIES

Public Wi-Fi: In 2010, Macao SAR Government enabled the installation of Wireless Broadband Systems “Wi-Fi GO”. The system provides citizens and visitors access the internet in high traffic public areas. Free wireless internet can be accessed at around 200 public hotspots and tourism attractions, although connectivity could be improved. The Government has facilitated the full installation of fiber optic network within Macao by a number of telecommunication providers. A programme for the full facilitation of Wi-Fi service across establishments has been discussed for expanding the service to more citizens and visitors.

Location Based, Geo-referenced, Real time Application: some applications offer Google-based maps or georeferencing functions that provide real-time help to visitors while visiting in Macao. However, there is no single tourism master app that consolidates all the services and synchronises all available information for visitors.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.2 ANALYSIS OF EXISTING CONDITIONS

8.2.3 SMART/MOBILE APPLICATION (APP) TECHNOLOGIES

Social Media Based Mobile Applications: social media web and mobile applications are popular in Macao. Facebook and WhatsApp dominates the social media with the largest following worldwide; WeChat, QQ and Messenger are also popular social platforms. Social media apps have multiple functions:

- Promotions
- Personalised tour guide
- Personalised experience
- Basic information
- Bookings
- On-line sales or on-line shopping
- On-line product or attraction rating
- Deals of the day or of the month
- For engagement or chatting
- Online help desk
- Product/destination rating

Social media social promotion

Facebook
Main promotion
- Gastronomy
- Scenery
- Hotel
- Shopping

QYER
Main promotion
- Restaurant
- Scenery
- Activity
- Shopping Spot

Mafeng
Main promotion
- Trip itinerary
- Scenery
- Restaurant
- Hotel

Wechat
Main Promotions
- Trip itinerary
- Star Restaurant
- Heritage site
- Museum
- Shopping/show

Services:
- Promotions
- Social media engagement

Services:
- Booking Hotels
- Booking scene tickets

Services:
- Booking Hotels
- Booking scene tickets

Services:
- Announcements/promotions
- QR based information
- Deals

Independent Mobile Applications: there are several mobile apps available for download, mostly for free, which provide tourist information about Macau.

Map-based Apps: offline maps of Macau, used by tourists travelling with or without internet connection.

Online travel guide Apps: attractions, itinerary, food & dining apps which provide basic information on restaurant and attraction location, prices, etc.

Other Specialised Apps: provide news and events, food/gastronomy, shopping, discounts and special deals. Some Apps are available for cashless payment transactions.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.2 ANALYSIS OF EXISTING CONDITIONS

8.2.4 MOBILE PAYMENT TECHNOLOGIES

Mobile Payment Options: Considering their fast and secure advantages, merchants are starting to leverage on mobile payments in Macao. Mobile payments are not only used for small value transactions, big value deals are getting more common.

1. WeChat Payments: WeChat has announced that foreign merchants will be able to accept WeChat payments. With over 650 million monthly active WeChat users and its payment platform “WeChat payment” (operated by Tencent's Tenpay), the platform offers great potential for foreign merchants to leverage on mobile payments among Chinese consumers. Tencent's support of cross-border transactions means that foreign merchants will be able to seamlessly receive payments in foreign currency with the assistance of authorised third party companies located overseas. Chinese consumers can enjoy the convenience of making online payments through their WeChat wallets or offline by using the QR code functionality, without the need to exchange foreign currency or to use credit cards. WeChat wallet is very easy to set up, and supports an open-door policy with regards to cross-border transactions. WeChat payment will offer a basic solution, and third party providers, who have a much better understanding of the foreign market will service this huge market.

2. UnionPay QuickPass: UnionPay's new mobile payment brand, UnionPay mobile QuickPass means payments can be made with smartphones, wearable devices and UnionPay chip cards at any China and overseas QuickPass terminals. UnionPay cardholders are able to make contactless payments at POS terminals with a “QuickPass” signage, or complete payments using their mobiles with a smartphone app. The number of mobile payment solutions of mobile QuickPass varies depending on phone brands and models. There are banks in Macao offering mobile application, customers can sync their NFC-enabled Android phones to their UnionPay credit cards issued by the bank, and thus get a mobile QuickPass card.

3. Visa PayWave and Mastercard PayPass: Visa PayWave and Mastercard PayPass are similar solutions that provide the convenience of making contactless payments and are already available across a range of retail, for example, convenience stores, supermarkets, fast food chains, cinemas and many more places. These are typically used to settle payments less than MOP1,000.

4. Macau Pass and 3rd Party Partners: Macau Pass is expanding its service and products. Macau Pass can be personalised to be a mini-card, a sim-card or even a watch. Macau Pass is building its network and partnerships with 3rd party providers to deliver better service in Macao. By law, 3rd party/mobile payment firms can conduct transaction activities in Macao through partnership with a local credit institution recognised by the Monetary Authority of Macau (AMCM).

• Alipay: With the cooperation of Alipay and Macau Pass, visitors with Alipay wallet on their mobile phones can make payments, via Macau Pass, in the city’s souvenir shops, supermarkets, convenience stores, bakeries and restaurants.

• Macau Pay: The first mobile payment platform operated by third party in Macao. It offers various online payment services, for example, barcode payment and bank quick payment, etc.

Source: Macao Business Daily; South China Morning Post; Image Source: Macao Government Tourism Office
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.2 ANALYSIS OF EXISTING CONDITIONS

8.2.5 TRANSPORTATION BASED REAL TIME INFORMATION

Real Time Bus Information: There are 3 bus operators — Transmac, TCM and New Era in Macao managing 79 bus lines. Since The Transport Bureau of Macao (DSAT) has opened up the real time information on public bus services, there is a number of supporting apps available in Macao, allowing users to have access to real time information of public bus service.

- DSAT has released an official app called “Bus Travelling System” that provides real time information of arrival times of public buses.
- Macau Public Buses – TCM and New Era provide real time bus information, bus route diversion information and other useful information related to bus services, via WeChat.
- Moovit as a global public transportation app, operating in over 1,200 cities in 75 countries/regions. Moovit can now acquire real time information from DSAT and publish routing information of buses and allow users to check nearby stations and arrival times of upcoming buses.

Image Source: Transport Bureau Mobile App
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.2 ANALYSIS OF EXISTING CONDITIONS

8.2.6 SMART HOTEL TECHNOLOGIES

Smart Hotels in Macao: There are some premiere hotels in Macao offering Touchscreen Automation Control in the rooms.

The Smart Hotel system delivers unique experiences for guests offering add-on service to comfort, quality, and luxury. Through one interface, such as remote control, touch screen or a keypad on the wall—guests can control drapes, lights, temperature, TV, and music, schedule wake-up scenes, request valet service, and more. This service is slowly raising the bar in Macao to increase guest experience and enhancing hotel operational efficiency, creating a win-win situation for property managers and travellers.

Some of the hospitality solutions being offered include:

• **“Now Occupied”** status during the check-in process, the PMS (Cloud based platforms that integrate Property Management Systems) triggers an “Occupied” room state. Room temperature is brought to a comfortable setting as guests head to the room.

• **“Warm Welcome”** function as guests enter for the first time. The “Welcome” scene will be activated with lights turned on, music played, drapes opened, and TV displaying a personalised greeting welcoming guests to the room.

• Energy Efficiency Sensors detect the occupancy and set thermostats back, and turn off lights automatically to reduce energy waste.

• Personalised experience allows guests to create their own custom experience Including Goodbye alarm clocks and wake-up calls. Guests can schedule their rise and a “Goodnight” button beside puts the room to sleep.

**Customer Conveniences.** Many or most hotels in Macao provide a number of basic technologies designed to improve the visitor experience including:

- **Wi-Fi.** Wi-Fi is generally available in hotel lobbies, restaurants and hotel rooms.
- **Mobile Phones.** A number of high end hotels provide guests with complementary smart mobile phones/ handsets which offer additional conveniences as an added value for their stay.

*Image Source: Macao Government Tourism Office*
Global Events and Security: Global terrorist activities put pressure on tourist destinations regarding safety and security. Attacks in Jakarta, Tunisia, Turkey, Paris, Brussels directly affected the travel industry. According to World Travel and Tourism Council (WTTC), tourism impact varies depending on the stability of a country or motives of the attack. Isolated incidents still threaten the travel and tourism industry. Visitors have concerns about these destinations or may not travel at all. Direct effects include drops in visitor statistics, for example 10%-30% drops in tourism numbers, 20%-25% drops in hotel occupancy rates, and percent increases in travel insurances. WTTC records an average of 13 months to recover from an attack.

Smart security systems that are being used in Macao:

- **The City Surveillance System (“Sky Eye”):**
  - CCTV cameras are being installed, by stage, at different locations of the city, including customs, tourist attractions.
  - A total of over 1,600 CCTV cameras will be installed in the future 5 years.

- **Macao International Airport - Airport Security Systems** include the followings:
  - Access control to the airport restricted areas and guarding
  - Inspection of all articles forwarded to the airport restricted areas
  - 100% screening of passengers, airport staff, air crew, and visitors
  - 100% screening of passengers’ hold baggage, cabin and interline baggage
  - X-ray screening of air cargo and mail
  - Inspection of aircraft catering supplies
  - Valuable cargo escort
  - 24-hours CCTV surveillance for the operation of the airport

- ** Casinos - Gaming Security Systems.** Concessionaires have invested in advanced surveillance technology, from chips with built-in radio transmitters to high-definition, multi-lens, digital cameras that can scan huge gaming floors. About 100,000 of the most advanced security cameras in the market have been installed since 2013. Concessionaires have 24 hours monitoring 7 days per week. Another 50,000 cameras will be installed until 2018.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.3 SCENARIO ASSESSMENT

1. Assessment of Current Tourism Situation

2. Identify the Key Issues and Assess the Implications

3. Hosting of International Forum, Public Consultation and Stakeholders Interviews

4. Outline the Key Objectives and Strategies

5. Specify Planning Proposals and Action Plans to Drive Implementation

- There are 200 Wi-Fi Go public hotspots in Macao. Smaller private establishments are lagging in terms of making available Wi-Fi to visitors for seamless travel experience.
- The city plans to install over 1,600 CCTV cameras for city surveillance and management in Macao.
- Mobile payments and alternative technology based payments are gradually becoming available in the city.
- Hotel industry is adopting the use of technology to offer value-added service to hotel guests.

- The current Wi-Fi service in Macao needs to be improved to enhance visitor experience.
- New technology can be costly and challenging to apply across the industry but can add value to destination and its management.

- Macao can apply smart technologies already available in key destinations.
- Expanding the free Wi-Fi Go coverage and upgrading it should be a priority.
- New information interchange platforms offer marketing & industry benefits.
- Visitors are increasingly reliant on mobile apps for their tourism experience.
- MGTO can promote industry cooperation for deploying smart technology.
The key objective is to **utilise innovative technology**. Application of innovative technologies in destination can enhance visitor experience, extend the length of stay, improve industry operations and ensure effective and real time monitoring of tourism situation. Technology applications optimise resources utilisation in the destination and can support Macao’s positioning as a World Center for Tourism and Leisure.

This key objective will be realised by the implementation of four key strategies:

- **Use Technology to Drive the Destination Marketing Approach** (refer to the chapter of “Tourism Branding and Marketing Strategies”): redesign marketing website of the destination with dynamic content and visually appealing content. A responsive design supports better website management, facilitates multi-layer marketing and strengthens website application.

- **Consolidate Tourism Information to Expand Tourism Capability**: establish a technology platform to collect tourism related information and allow data sharing between the industry, government departments and other tourism organisations and content providers. Big data in tourism area can be set up to spur the application and development of innovative technologies in tourism industry.

- **Facilitate Smart Technology Applications**: Macao has installed a series of infrastructural work of developing a smart city. With the continual advancement of information technology, expanding coverage and optimizing facilities is essential to seamless travel experience and robust safety and monitoring system.

- **Use Technology to Increase Safety and Security Level of the City**: installing smart security systems is a response to global security threats. Macao’s large visitor volumes imply high potential risks and suggest the importance of enhanced security systems for monitoring, quick response and a reputation as a safe destination.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.4 KEY OBJECTIVE AND STRATEGIES

8.4.1 STRATEGY 1: USE TECHNOLOGY TO DRIVE DESTINATION MARKETING APPROACH

Technology advancement is making it easier to market brands and destinations, with innovative technologies being well-used across the tourism industry. Technology supports sharing and uploading of content to support marketing functions.

Key Strategies to Meet the Objective

- Redesign the website to be responsive and dynamic.
- Expand website-device-app functionality for social media and user content integration, real time data sharing and push notifications.
- Collect market analytics and research for segment specific and personalised marketing.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.4 KEY OBJECTIVE AND STRATEGIES

8.4.2 STRATEGY 2: CONSOLIDATE TOURISM INFORMATION TO EXPAND TOURISM CAPABILITY

Tourism information across the industry is multiple but segregated. Different stakeholders have various levels of application and implication of their own CMS system. There is no unified format for different CMS systems, making it difficult for data reuse. Macao needs an integrated database with consistent and unified formatting. Setting up a tourism information interchange platform allows data sharing among various stakeholders, ensures data consistency.

Key Strategies to Meet the Objective

• Implement a tourism interchange platform with enhanced capability to allow diversified ways for data collection and exchange.
  ➢ Build up partnership with various stakeholders for platform construction;
  ➢ Define data formatting according to the industry needs;
  ➢ Use technology to create, manage and store content, and share information with industry partners and overseas representatives.

• Publicise tourism information to facilitate application and development of innovative technologies in the industry.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.4 KEY OBJECTIVE AND STRATEGIES

8.4.3 STRATEGY 3: FACILITATE SMART TECHNOLOGY APPLICATIONS

Smart destinations leverage on the smart facilities available. The Internet of Things is the future development trend, it means visitors can obtain real time data and information via different channels.

Key Strategies to Meet the Objective

- Build Macao as a seamless connected destination
  - Expand Wi-Fi capability and coverage.
  - Provide various measures to consolidate existing network resources.
  - Conduct studies on smart technologies, such as 5G network.
- Implement crowd monitoring and management in high traffic tourism areas.
- Deploy smart tools for real time information on transportation, events, promotions, push notifications, etc.
- Collect and document videos on tourism attractions.
- Enhance visitor experience through systems that interact with smart devices.

Image Source: Macao Government Tourism Office
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

8.4 KEY OBJECTIVE AND STRATEGIES

8.4.4 STRATEGY 4: USE TECHNOLOGY TO INCREASE SAFETY AND SECURITY LEVEL OF THE CITY

A smart control center can be the central point of intelligence for constant monitoring of high traffic tourism spots and transportation congested areas with software supported smart tools. A combination of technologies – CCTV cameras and sensors can pick up crowd flow and behavioral changes and patterns, and minimise human error to respond to possible threats and safety loopholes.

Key Strategies to Meet the Objective

• Deploy traffic and crowd management systems.
• Disseminate messages to divert visitors away from crowds.
• Create a smart tourism center specifically for managing tourism areas.
8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY
8.5 PLANNING PROPOSALS AND ACTION PLANS

The four strategies are conceptual ideas which achieve the key objective to **utilise innovative technology**. The four planning proposals are specific implementations, supported by short- and medium-term action plans.

**Responsive Website Redesign for an Elevated User Experience and Interface.** (Refer to implementation strategy of “Upgrade online marketing systems and content”– Tourism Marketing and Branding chapter for details).

**Set-up a Tourism Information Interchange Platform to Facilitate Content and Industry Management with Innovative Technology:** with tourism as the pillar industry of Macao, it’s recommended to build a tourism information interchange platform for sharing, receiving, storing and publishing tourism content across partners and stakeholders, facilitating the application and development of innovative technology in tourism industry. It can be further integrated with overall big data of Macao at later stage.

**In-market Smart Tourism Technology Applications to Improve Travel Experience:** visitors are becoming mobile dependent. Technologies ease pressure on destinations to be competitive in their experiential offerings. Technology tools help respond to real time visitor needs and add value to the visitor experience.

**Expanded Tourism Security Systems through Smart Technologies:** technology based security systems are important installations for smart destinations. Macao’s current installations can be expanded to serve the tourism industry: monitor, track and respond to sources of vulnerabilities and threats.
### 8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

#### 8.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>Planning Proposals</th>
<th>LAYING THE FOUNDATIONS (Short-Term 0 to 5 years)</th>
<th>FACILITATING PRODUCTIVITY AND EFFICIENCY (Medium-Term 6 to 10 years)</th>
</tr>
</thead>
</table>
| **P 6.1** Set-up a Tourism Information Interchange Platform to Facilitate Content and Industry Management with Innovative Technology | • 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 | • P 6.1.3 Integrate with big data of Macao smart city |
| **P 6.2** 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 | |
| **P 6.3** 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 | |
# 8. Tourism and the Application of Innovative Technology

## 8.5 Planning Proposals and Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 6.1.1 | Set up a Tourism Information Interchange Platform to Facilitate Content and Industry Management with Innovative Technology | • Set up a tourism information interchange platform with a consistent format and data sharing means, contributing to data sharing and data reuse among various stakeholders. | • Establish partnership with stakeholders to engage them to use the system and jointly build content.  
• Conduct research on information interchange format.  
• Exchange ideas of specific arrangements with participants in the field.  
• Erect the information platform.  
• Develop the structure of the tourism content database. | Technology and Tourism Areas |

| P 6.1.2 | Provide training and promotion to facilitate the use of the tourism information interchange platform | • Conduct training programmes and promotion plan on the advanced use and application for the tourism information interchange platform. | • Conduct training on the programming, software and hardware use for the platform.  
• Develop plan to advocate the use of platform to spark the application of innovative technology in tourism industry. | Tourism Area |
## 8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY
### 8.5 PLANNING PROPOSALS AND ACTION PLANS

### P 6.1 Set-up a Tourism Information Interchange Platform to Facilitate Content and Industry Management with Innovative Technology

**Medium-Term Action Plans**

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<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 6.1.3 | Integrate with big data of Macao smart city | • Participate in the development project of Macao smart city to facilitate the integration of Big Data of Macao smart city with tourism information interchange platform. | • Participate in the establishment of big data of Macao smart city.  
• Optimise the standard of the tourism information interchange platform, and create adequate APIs for the linking with Big Data of Macao smart city. | Technology and Tourism Areas |
### 8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY
#### 8.5 PLANNING PROPOSALS AND ACTION PLANS

**P 6.2 In-market Smart Tourism Technology Applications to Improve Travel Experience | Short-Term Action Plans**

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<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 6.2.1 | **Conduct applied research on innovative technology in tourism industry**        | • Conduct feasibility research on innovative technology applications, encouraging deployment of smart technologies and spurring the development of smart tourism. | • Carry out feasibility studies on tourism-related innovative technology, such as Internet of Things, Beacons, AR, VR, etc.  
• Evaluate available technologies for tourism industry.  
• Study technology application in key areas, including:  
  ➢ Stakeholders and tourists survey  
  ➢ Applied research for industrial management solutions, stakeholder cooperation, tourism experience, etc. | Technology and Tourism Areas |
| P 6.2.2 | **Facilitate deployment of wider Wi-Fi service and coverage**                     | • Expand the use and coverage of Wi-Fi service, making it easier for visitors to search and receive up-to-date information. | • Expand Wi-Fi service coverage across the whole city.  
• Integrate the existing network resources among public and private sectors.  
• Conduct the applied studies on smart technologies, such as 5G network, to help Macao become a destination with seamless connection. | Technology and communication Areas |
### 8. TOURISM AND THE APPLICATION OF INNOVATIVE TECHNOLOGY

#### 8.5 PLANNING PROPOSALS AND ACTION PLANS

#### P 6.3 Expanded Tourism Security Systems through Smart Technologies | Short-Term Action Plans

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 6.3.1 | **Conduct study of a smart tourism control center**                    | • Conduct a feasibility study on setting up a smart tourism control center to manage the real-time surveillance on crowded tourist spots.                                                                 | • Research on best practices on smart tourism control centers and their operational models.  
• Identify the crowded and popular tourist spots in Macao.  
• Conduct feasibility studies on the applicable smart technologies based on the actual condition of attractions and venues.                                                                                                                   | Tourism and Security Areas       |
| P 6.3.2 | **Employ technological means to provide real-time information on crowded tourism areas** | • Redistribute and divert visitors from crowded tourism attractions during busy hours through an effective informing system on crowding situation.                                                                 | • Employ application of new technologies at tourism sites to monitor crowding situation, such as heat-map.  
• Provide crowding information to visitors via different communicating channels such as real time messages, mobile application and social media platform etc.  
• Announce tourism related information via electronic billboards at key tourism spots, including hotels and border points.  
• Cooperate with local travel agencies to provide real time crowding information, to direct package tours visiting busy tourism sites during off-peak hours.                                                                                       | Tourism and Security Areas       |
### Expanded Tourism Security Systems through Smart Technologies | Short-Term Action Plans

<table>
<thead>
<tr>
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<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 6.3.3 | Expand current city surveillance (“Sky Eye”) to cover tourism areas | • Carry out phased installation of the City Surveillance “Sky Eye”, to enhance Macao’s capability on managing security and transportation issues, and monitoring crowds.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | • Install the City Surveillance “Sky Eye” in places such as security black spots, transportation hubs, tourism attractions, key facilities, quiet and other high risk areas.  
• Continue to evaluate the whole surveillance system and expand it to other areas as needed.                                                                                                                                                                                                                                                                                                                                                                                             | Security Area |


CHAPTER 9
TOURISM INDUSTRY COOPERATION SYSTEM
9. TOURISM INDUSTRY COOPERATION SYSTEM

9.1 INTRODUCTION

To achieve the city’s vision of becoming a “World Centre of Tourism and Leisure”, the Macao SAR Government must have in-depth knowledge of tourism development trends.

The government will need to establish better coordination and cooperation between the tourism related departments and the tourism industry, including urban development, transportation, human resources, and promotion and marketing. By enhancing tourism cooperation, Macao will be better placed to achieve its goal of becoming a World Centre of Tourism and Leisure.

The key strategies for improving tourism industry cooperation are presented in this chapter. These strategies are underpinned by the baseline assessment, input from the public consultation, and case studies of successful practices in other places.

The planning proposals in this chapter focus on how to improve tourism related laws and legislation, and enhance tourism industry cooperation. Each planning proposal is supported by short or medium term action plans, with content covering the following:

This chapter includes the following:

9.1 Introduction
9.2 Analysis of Existing Conditions
9.3 Scenario Assessment
9.4 Key Objective and Strategies
9.5 Planning Proposals and Action Plans
9. TOURISM INDUSTRY COOPERATION SYSTEM

9.2 ANALYSIS OF EXISTING CONDITIONS

9.2.1 EXISTING CONDITIONS OF TOURISM INDUSTRY COOPERATION

As a leading role in tourism, travel agencies play an important part in the development of the industry. Being an organiser as well as a seller of tourism products, especially in group tours, travel agencies and tour guides have pivotal functions. Therefore, the travel agencies’ operation and supervision are crucial for the industry.

Tourism Related Legislation

Decree-Law no. 48/98/M - Approving the new legal regime of the travel agency and tour guide professional
Administrative Regulation no.42/2004 – Amendment to the legal regime of the travel agency and tour guide professional.

- Travel agencies and tour guides in Macau are currently regulated by Decree-Law no. 48/98/M (Approving the new legal regime of the travel agency and the tour guide professional), of which the law was partially amended by Administrative Regulation no.42/2004 (Amendment to the legal regime of the travel agency and the tour guide professional) in 2004.

- Decree-Law no. 48/98/M (approving the new legal regime of the travel agency and the tour guide professional) has 11 chapters in total. It generally regulates the operation and code of practice of travel agencies, licenses, relationship with clients, tour guides professionalism and punishment in violation of law.

- Decree-Law no. 48/98/M which was first published in 1998 and amended in 2004 by Administrative Regulation no. 42/2004, some of its content cannot cope up with the recent years’ growth, change in travel patterns and the travel agencies’ and tour guides’ development needs. In order to cope with the tourism industry's development, tourism legislation needs to be amended. Currently, the tourism legislation is under modification procedure.

Source: Government Printing Bureau
Zero-fare Tour Problem

- Zero-fare tour means tours that only ask for relatively low tour fee or even provide free tour.
- Currently Macau is now only regulated by the Commercial Code for any anti-unfair competition, where article 169 (sales at a loss) defines “unfair competition”: ‘Sales effected below the cost or acquisition price are considered unfair, if they are part of a strategy directed at the elimination of a competitor or group of competitors from the market.’
- However, since the Commercial Code is a private law, so when enterprises commit acts of unfair competition, only victims (other companies) can take legal action. The government does not have the authority to take the initiative.
- Zero-fare tours mostly happened to Mainland China’s tours, where Mainland China’s travel agencies (Organizing Tour Operators) are responsible for organizing Mainland China’s visitors to travel in Macao and sell Macao tourism products, while Macao’s travel agencies (Ground Receiving Agents) are responsible to provide service to the Mainland China’s visitors after their arrival into Macao.
- Travel agencies who receive the zero-fare tour will usually make profits through other ways, such as inducing tourists to join self-paying activities or forcing them for shopping.
- According to Decree-Law no. 48/98/M article 41 clause 1i), travel contract must list out all self-paying items; article 41 clause 2 and Article 39 clause a), also regulate such information should be provided in written or other appropriate form, i.e. all self-paying items and information have to be written in the travel contract, and should provide customers with all relevant information.

- The Mainland China’s Organizing Tour Operators sign contract with the Mainland China visitors, and the Macao Ground Receiving Agents sign contract with the Mainland China’s Organizing Tour Operator; therefore, there is no legal contract between the Macao Ground Receiving Agents and Mainland China visitors, and could not provide any information to the Mainland China visitors via contracts. Should the Mainland China visitors find out that the information provided by the Organizing Tour Operators and the Ground Receiving Agents are different, they could complain locally. Since the Mainland China Tour Operators are not governed by Macao regulations, received complaints will be transferred to related Mainland departments.
- According to the Decree-Law no. 48/98/M Article 36, Macao Travel Agencies must be held responsible for the tourism services they provide and are liable to the customers. Although service tariffs are required to be reported, as tourism service tariffs could appear in different forms and involve various operations, it is easily evitable and it is still impossible to track down all zero-fare tours figures.
- Regarding the information and level of service provided by the tour guides and travel agencies, currently there is no mechanism to measure their performance. The Macao SAR Government is proposing to revise and update the related clauses in the Decree-Law.
9. TOURISM INDUSTRY COOPERATION SYSTEM

9.2 ANALYSIS OF EXISTING CONDITIONS

9.2.1 EXISTING CONDITIONS OF TOURISM INDUSTRY COOPERATION

Tourism Licensing

Under the existing legislation, different profession or premises (as listed in table 7.1) are required to apply for license or permission to be approved by the Macao Government Tourism Office. The length of the approval process and validation period of each license varies. The efficiency of the approval process directly affects the operation of the tourism industry.

Table 9.1: Types of licenses issued by the Macao Government Tourism Office

<table>
<thead>
<tr>
<th>Type of license or permission</th>
<th>Relevant Legislations</th>
<th>Period of validity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Tour Guide</td>
<td>Decree-Law No. 48/98/M - Legislation of travel agency activities and tour guide profession. Order No. 399/99/M - Certificates I &amp; II I related to tourism</td>
<td>3 years</td>
</tr>
<tr>
<td>2 Transferist</td>
<td>Decree-Law No. 48/98/M - Legislation of travel agency activities and tour guide profession.</td>
<td>3 years</td>
</tr>
<tr>
<td>3 Tour Guide Trainee</td>
<td>Decree-Law No. 48/98/M - Legislation of travel agency activities and tour guide profession.</td>
<td>Not applicable</td>
</tr>
<tr>
<td>4 Travel Agency</td>
<td>Decree-Law No. 48/98/M - Legislation of travel agency activities and tour guide profession. Order No. 263/99/M - Professional liability insurance for travel agency. Order No. 265/99/M - Premium list of professional liability insurance for travel agency.</td>
<td>1 year</td>
</tr>
<tr>
<td>5 Self-Drive Rent-a-Car</td>
<td>Decree-Law No. 52/84/M - Regulation of Self-drive Automotive Vehicles Rental Business.</td>
<td>Not applicable</td>
</tr>
<tr>
<td>6 Hotels</td>
<td>Decree-Law No. 16/96/M - Legal regime of hotel industry and similar industry</td>
<td>1 year</td>
</tr>
<tr>
<td>7 Restaurants</td>
<td>Order No. 83/96/M — Regulations of hotel industry and similar industry</td>
<td>1 year</td>
</tr>
<tr>
<td>8 Nightclubs</td>
<td>Order No. 83/96/M — Regulations of hotel industry and similar industry</td>
<td>1 year</td>
</tr>
<tr>
<td>9 Bars</td>
<td>Order No. 83/96/M — Regulations of hotel industry and similar industry</td>
<td>1 year</td>
</tr>
<tr>
<td>10 Saunas</td>
<td>Order No. 47/98/M - Administrative license for sauna, massage parlours, health clubs and karaoke lounges.</td>
<td>1 year</td>
</tr>
<tr>
<td>11 Massage Parlours</td>
<td>Dispatch no. 104/GM/98 - Charge for issue and renewal of administrative license for sauna, massage parlours, health clubs and karaoke lounges.</td>
<td>1 year</td>
</tr>
<tr>
<td>12 Health Clubs</td>
<td>Dispatch no. 104/GM/98 - Charge for issue and renewal of administrative license for sauna, massage parlours, health clubs and karaoke lounges.</td>
<td>1 year</td>
</tr>
<tr>
<td>13 Karaoke Lounges</td>
<td>Dispatch no. 104/GM/98 - Charge for issue and renewal of administrative license for sauna, massage parlours, health clubs and karaoke lounges.</td>
<td>1 year</td>
</tr>
<tr>
<td>14 Tourism Utility</td>
<td>Decree-Law No. 81/89/M - Legal regime regulating tourism utility</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

Source: Macao Government Tourism Office
Cross-departmental Collaboration

• Tourism planning covers a wide range of policy areas which include social, culture, environment, health, education, training, information technology, economic, transportation, etc. These all involve effective coordination and policy coherence across government departments.

• Since tourism development involves contribution, joint efforts and collaboration with multi-departments, the Macao Government Tourism Office tasks the main entity responsible for tourism development according to the Administrative Regulation no. 18/2011, which outline its structure, operation and responsibility, including collaboration and coordination with different entities, in order to promote tourism development.

• The Committee for Development of the World Centre of Tourism and Leisure Development is established according to the Dispatch of Chief Executive no. 330/2015. Currently, all committee members are mainly high-level government officials with roles to conduct research, formulate policies and develop plans.

• As an UNESCO World Heritage site, tourism planning in Macao advocates greater cooperation between tourism and heritage management in recent years. The Cultural Heritage Committee was established to offer advice and solutions in protecting Macau’s cultural heritage assets.

Image Source: Macao SAR government portal (Simplified by Project Team)
9. TOURISM INDUSTRY COOPERATION SYSTEM

9.2 ANALYSIS OF EXISTING CONDITIONS

9.2.1 EXISTING CONDITIONS OF TOURISM INDUSTRY COOPERATION

Public-private Cooperation

• The Tourism Development Committee bridges communication between the government and tourism industry stakeholders. However, at present this Committee is only an advisory body.

• The private sector has a supporting role in achieving Macao’s vision as a “World Centre of Tourism and Leisure”, through developing tourism products and ensuring high service quality for the industry.

• Private enterprises are always hoping to enhance and maintain better collaboration with the government in order to reach a common goal; however, there is still room for improvement on communications and cooperative efforts between the public and private sectors.

• Although the government’s support and cooperation efforts have significantly increased in recent years, such Macao Shopping Festival, Oktoberfest and other activities, the industry reflected that government efforts in terms of cooperative marketing and promotion still needs to be further strengthened.

• At present, different large-scale integrated resort operators have been actively involved in the corporate social responsibility programmes, to mitigate any arising problems which affect the society, including traffic and environment issues. Their current programmes include, but not limited to: green building, environmental management (ISO certification, waste and water management, energy conservation plan, reduce electricity consumption, water use, carbon emissions), green transport (provide shuttle bus for hotel staffs and customers to reduce vehicle use), and to enhance internal and social awareness of environmental protection.

Image Source: Macao Government Tourism Office
9. TOURISM INDUSTRY COOPERATION SYSTEM
9.3 SCENARIO ASSESSMENT

• Current tourism-related laws and legislation fail to fully regulate the travel itineraries and shopping scam.
• Current licensing approval process can be very time consuming.
• Cross-departmental collaboration is lacking centralised cooperative planning principles and guidelines.
• The Tourism Development Committee is a public-private cooperation committee, but is only an advisory body.

Macao’s tourism image is affected by low cost tours and shopping scam.

• The public expressed concerns about lengthy approval process for licenses.
• Lack of coordination between the government departments will hinder the implementation of the Master Plan.
• The government should work closely with SMEs to explore more tourism products and promotion.
This key objective is to **enhance tourism industry cooperation**. The goals of this objective are to streamline existing administrative procedures, to improve tourism legislation, and to enhance the collaboration among public and private sectors, in order to ensure an effective, efficient and implementable Tourism Master Plan.

This key objective will be realised by the implementation of four key strategies:

- **Formulate Viable and Up-to-date Tourism Law and Regulations**: adjust and update the legislation at the appropriate timing in order to support the tourism development needs.
- **Review the Licensing Mechanism**: simplifying the administrative procedures to increase efficiency in licensing application and renewal process.
- **Effective Cross-department Coordination and Management**: strengthen and improve collaborative efforts and synergies among the public departments.
- **Strengthen Collaboration between Public and Private Sectors**: improved communication and coordination is essential for enhancing industry cooperation.
9. TOURISM INDUSTRY COOPERATION SYSTEM

9.4 KEY OBJECTIVE AND STRATEGIES

9.4.1 STRATEGY 1: FORMULATE Viable AND UP-TO-DATE TOURISM LAW AND REGULATIONS

Tourism development will need to have a set of valid and up-to-date law and legislation in place to supervise and regulate the operations of the tourism-related businesses, including tour guides and travel agencies, along with guidance for handling travel disputes and legal liabilities.

Macao’s tourism image is affected by low/zero-fare tours where visitors are forced into scams. Tours should be regulated by law, with information such as travel itinerary and additional expenses clearly indicated in the tour package contract. This strategy aims to modify tourism-related law and legislation to reduce tourism disputes and protect visitors’ rights.

*Image Source: Macao Government Tourism Office*
The tourism-related sectors have to apply license issued by the Macao Government Tourism Office. The application process varies and validity period of each type of license differs. The efficiency of the approval process directly affects the operation of the tourism industry as well as has huge economic impact on investors since delays in business operation incur various costs.

This strategy aims to simplify the procedures for licensing application and increase efficiency for the renewal process. By referencing the experiences from other countries or cities, Macao can draw from the best practices and study the feasibility for issuing provisional license to food and beverage premises.
9. TOURISM INDUSTRY COOPERATION SYSTEM

9.4 KEY OBJECTIVE AND STRATEGIES

9.4.3 STRATEGY 3: EFFECTIVE CROSS-DEPARTMENT COORDINATION AND MANAGEMENT

Tourism planning and development covers various aspects, which involves joint efforts and effective contribution among different government departments. Effective collaboration is significant towards successful development, directing every party to achieve a common goal. The Tourism Industry Development Master Plan will make a positive impact on Macao’s tourism industry, this requires a high level of multiple efforts and coordination in order to ensure its implementation and application.

It is important to enhance communication among departments so as to improve efficiency and ensure successful tourism development and growth. This strategy helps to improve multi-department collaboration to ensure all strategies and action plans can be effectively implemented.

*Image Source: Macao Government Tourism Office*
9. TOURISM INDUSTRY COOPERATION SYSTEM

9.4 KEY OBJECTIVE AND STRATEGIES

9.4.4 STRATEGY 4: STRENGTHEN COLLABORATION BETWEEN PUBLIC AND PRIVATE SECTORS

The private sector greatly contributes to Macao’s tourism industry, and has a supporting role in achieving Macao’s vision as the World Centre of Tourism and Leisure, through developing tourism products and ensuring high service quality.

The government’s cooperative efforts are important, and coordinated actions between the government and stakeholders are essential for leading to successful tourism development. This strategy helps to improve the overall collaboration and communication between the public and private sector by optimising the role of the Tourism Development Committee, and increase the corporate social responsibilities to hotel operators.

In addition, to support the big data system as described in the chapter “Tourism and the Application of Innovative Technology”, a high level of multiple cooperation is essential, in order to achieve data sharing between the public sector and the industry under a feasible legal framework.

Image Source: Macao Government Tourism Office
To achieve the key objective of enhance tourism industry cooperation, from the conceptual level proposed four planning proposals, complement with short-term action plans.

**Review Tourism-related Laws and Legislation:** the existing tourism laws and legislation should be reviewed in light of the expansion in tourism and changing travel patterns with an emphasis in avoiding disputes due to lack of clarity in the law.

**Refine the Licensing System:** explore the provisional licensing system, simplify the licensing application procedures and increase the administrative efficiency.

**Optimise Cross-departmental Collaboration:** fully utilise the tasks and functions of the Tourism Development Committee to improve the communication and coordination between departments.

**Enhance Public-Private Cooperation:** optimising the role of the Tourism Development Committee, increasing the stakeholders' participation in the tourism industry.
## 9. TOURISM INDUSTRY COOPERATION SYSTEM

### 9.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>Planning Proposals</th>
<th>LAYING THE FOUNDATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>P 7.1</strong> Review Tourism-related Laws and Legislation</td>
<td>Short-Term (0 to 5 years)</td>
</tr>
<tr>
<td>• 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”</td>
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<tr>
<td>• P 7.1.2 Revision of Decree-Law 48/98/M to develop a new system for travel agencies and tour guides</td>
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<tr>
<td><strong>P 7.2</strong> Refine the Licensing System</td>
<td></td>
</tr>
<tr>
<td>• P 7.2.1 Explore to set up a provisional licensing system</td>
<td></td>
</tr>
<tr>
<td>• P 7.2.2 Optimise license application procedures</td>
<td></td>
</tr>
<tr>
<td><strong>P 7.3</strong> Optmise Cross-departmental Collaboration</td>
<td></td>
</tr>
<tr>
<td>• P 7.3.1 Expand the existing responsibilities of the Tourism Development Committee (CDT)</td>
<td></td>
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<tr>
<td>• P 7.3.2 Participate in developing the open data sharing system</td>
<td></td>
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<tr>
<td><strong>P 7.4</strong> Enhance Public-Private Cooperation</td>
<td></td>
</tr>
<tr>
<td>• P 7.4.1 Optimise the role of the Tourism Development Committee (CDT) as a bridge between government and industry</td>
<td></td>
</tr>
<tr>
<td>• P 7.4.2 Define the corporate social responsibilities for integrated resorts and gaming concessionaires</td>
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## 9. TOURISM INDUSTRY COOPERATION SYSTEM

### 9.5 PLANNING PROPOSALS AND ACTION PLANS

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<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>P 7.1.1</td>
<td>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”</td>
<td>• To safeguard the visitors’ rights and interests, to continuously made improvement and reference to the “key points in contract between Mainland China’s tour operators organizing tours for mainland residents to Macao and Macao’s ground receiving agents”</td>
<td>• It is suggested that Macao local agents can refer to the &quot;key points&quot; when revising contracts with the Mainland China’s travel agencies. The contents shall include travel itinerary, type of accommodation, additional expenses and insurance to protect the visitors’ rights and interests</td>
<td>Tourism Area</td>
</tr>
<tr>
<td>P 7.1.2</td>
<td>Revision of Decree-Law 48/98/M to develop a new system for travel agencies and tour guides</td>
<td>• As the number of visitors continue to rise, together with the changing travel patterns, tourism facilities and human resources, it is necessary to revise the current law in order to achieve sustainable development of the tourism industry.</td>
<td>• Review and revise the Decree-Law 48/98/M, and propose any further modifications or additional regulations.</td>
<td>Tourism Area</td>
</tr>
</tbody>
</table>
### 9. TOURISM INDUSTRY COOPERATION SYSTEM
#### 9.5 PLANNING PROPOSALS AND ACTION PLANS

**P 7.2** Refine the Licensing System | Short-Term Action Plans

<table>
<thead>
<tr>
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<th>Description of Action Plan</th>
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<th>Respective Area</th>
</tr>
</thead>
</table>
| P 7.2.1 | Explore to set up a provisional licensing system | • For restaurants which licenses are issued by the Macao Government Tourism Office, conduct a feasibility study on issuing provisional licenses. | • Further explore the practicality of provisional operation license, and define the types of licenses feasible for provisional license.  
• Set up a mechanism for provisional operation license application, and formulate validity period and conditions for renewal of the provisional license. | Tourism Area |
| P 7.2.2 | Optimise license application procedures | • Simplify the administrative procedures for license applications by utilising innovative technology. | • Establish an online system, and allow licensees to manage any license related matters online.  
• Set up an online enquiry function, so that applicants can check their application process and status from time to time, and carry out timely follow up actions on relevant applications when necessary. | Tourism Area |
### 9. TOURISM INDUSTRY COOPERATION SYSTEM

#### 9.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
<thead>
<tr>
<th>No.</th>
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<th>Description of Action Plan</th>
<th>Specific Actions</th>
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</tr>
</thead>
</table>
| P 7.3.1 | Expand the existing responsibilities of the Tourism Development Committee (CDT) | • Tourism development involves efforts of multi-departments in various areas.  
• The Tourism Development Committee (CDT) is comprised of representatives from different government departments and the tourism industry. At present, the CDT has four sub-taskforces responsible for different areas of work.  
• It is suggested to make use of the roles of government departments in the Committee, strengthen their functions and responsibilities to exert better internal coordination and promote cross-sector cooperation within the government. | • Under the existing composition and structure of the CDT, establish another sub-taskforce responsible for cross-departmental coordination. This sub-taskforce mainly includes representatives of government departments within the committee.  
• The role of the sub-taskforce:  
  − Promote cross-departmental communications and collaboration.  
  − Initiate regular coordination mechanism, enhance cross-departmental work efficiency and resilience ability.  
  − Assist to consult and collect comments from cross-department representatives on various planning projects in the Macao Tourism Industry Development Master Plan. | Tourism Consultative Associations |
| P 7.3.2 | Participate in developing the open data sharing system | • Participate in the research work on cross-departmental open data sharing data system, to work in line with the development goals of the Government's five-year plan to develop the e-government project. | • Support in the implementation of the data sharing platform.  
• Provide information to the portal which can be shared with other government departments. | Civic Municipal and Tourism Areas |
### 9. TOURISM INDUSTRY COOPERATION SYSTEM

#### 9.5 PLANNING PROPOSALS AND ACTION PLANS

**P 7.4 Enhance Public-Private Cooperation | Short-Term Action Plans**

<table>
<thead>
<tr>
<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
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</tr>
</thead>
</table>
| P 7.4.1 | **Optimise the role of the Tourism Development Committee (CDT) as a bridge between government and industry** | • The tourism industry representatives in the CDT to regularly provide opinions to the government in order to facilitate the development of both small and medium-sized enterprises and large-sized enterprises in the tourism industry. | • Enhance the role, function and operation of the CDT.  
• Further strengthen the cooperation between the CDT and different government departments. In the future, prior to formulating plans or framework relating to the development of the tourism industry, the government can consult the CDT members to collect more practical advice and take full consideration of their views and opinions, so that the working plans can meet the real needs for tourism development. | Tourism Consulting Associations |
| P 7.4.2 | **Define the corporate social responsibilities for integrated resorts and gaming concessionaires**    | • Define the corporate social responsibilities for large-scale integrated resort operators or gaming concessionaires in order to promote sustainable development for tourism industry, such as transportation and environmental issues, extra protection for employees, etc. | In addition to the current corporate social responsibilities, it is suggested that the operators can also consider the following:  
• Through shift schedules to segregate workers for different flexible working hours, to reduce the number of patrons using public transportation during peak hours.  
• Consider the future potential for utilising the Cotai Border for Mainland non-resident workers employed by those operators.  
• Encourage green building concepts in large-scale integrated resorts, improve corporate environmental awareness (e.g. waste and water management, reducing electricity and carbon emissions).  
• Apart from the rights, obligations and remuneration required in the Macao “Labour Relations Law” and “Law on Employment of Non-resident Workers”, it is necessary to encourage the operators to explore and offer additional benefits for employees to improve their sense of belonging and quality of life, such as career planning for both local and non-resident employees, facilitate horizontal and upward mobility through training, and extra welfare. | Economics Area            |
CHAPTER 10
INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.1 INTRODUCTION

This chapter aims to discuss how Macao can strengthen and enhance its well established ties with the regional and international partners, in the fields of tourism cooperation. Furthermore, it is to explore the new opportunities and ideas that contribute to the provisions of clear directions and responsibilities for the implementations of greater collaboration between Macao and the related bodies, including government departments, corporations, associations and alike.

It aims to develop Macao into the core city of tourism in the Pearl River Delta region, by better managing flows of people, visitors and labour in the tourism sector alike, by improving visa facilitations and transport connectivity. This chapter also discusses the joint marketing promotion with the regional partners, by exploring opportunities in the cross boundary tourism products and activities.

On the international level, Macao needs to get recognition through actively acquiring awards and ratings among the international tourism community, so as to strengthen its image as a “World Centre of Tourism and Leisure”.

This chapter includes the following:
10.1 Introduction
10.2 Analysis of Existing Conditions
10.3 Scenario Assessment
10.4 Key Objective and Strategies
10.5 Planning Proposals and Action Plans
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.2 ANALYSIS OF EXISTING CONDITIONS

10.2.1 OVERVIEW OF INTERNATIONAL TOURISM COOPERATION IN MACAO

International tourism cooperation of Macao focuses mainly on two areas: joint promotion and tourism organisation participation.

- Macao takes part in international cooperation through tourism promotion and participation in major international tourism organisations. It has established a sound international promotion network through MGTO Overseas Representatives and the Macao SAR Delegations in major countries/regions around the world, which serve as the platforms for joint promotions and cooperation. Currently, key source markets for Macao’s international promotion mainly include Europe, America, Australia, New Zealand, Southeast Asia, South Korea, Japan and so on.

Macao has participated in the following international tourism organisations:

- World Tourism Organisation (UNWTO): Macao participates in UNWTO meetings and activities, including forums, training, seminars and so on.

- Pacific Asia Travel Association (PATA): Macao participates in PATA meetings and activities, including annual conferences, tourism trade fairs. PATA also provides services, including special guidance to its members, in particular in the fields of developing tourism related policies, tourism products development, staff trainings, and alike.

- APEC Tourism Working Group (TWG): In 2014 Macao hosted APEC Tourism Ministerial Meeting with the support of the Central Government, which brings important opportunities for Macao to strengthen its positioning as a “World Centre of Tourism and Leisure”.

- World Tourism Cities Federation (WTCF): Macao participates in its meetings and events, for example, the yearly Fragrant Hills Summit and the World Tourism Cities Expo etc.

Based on the “Belt and Road” Initiative and its close tie with the Portuguese-speaking countries, Macao can seek opportunities for tourism cooperation with its international and domestic partners.

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Figure 10.1: Distribution of MGTO Overseas Representatives and Macao SAR Delegations

Figure 10.2: Major International Tourism Organisations Participated by Macao

10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.2 ANALYSIS OF EXISTING CONDITIONS

10.2.2 OVERVIEW OF REGIONAL TOURISM COOPERATION IN MACAO

Macao’s regional tourism cooperation represents in three levels: Macao and Mainland China, Macao and Pan-Pearl River Delta (PPRD), Macao-Guangdong-Hong Kong cooperation.

- Macao and the Mainland China mainly cooperates through the “Mainland and Macao Closer Economic Partnership Arrangement” (hereafter referred as “CEPA”)
  - a) The signing and implementation of CEPA has promoted multi-level and wide-ranging cooperation between Macao and the Mainland. CEPA plays a key role in supporting the implementation of free trade between Macao and Mainland China.
  - b) Tourism is one of the sectors with the highest level of openness in CEPA. It involves investment in tourism facilities, establishment of travel agencies, operation of tourist services, “multi-destination” travel route etc.
- Macao and the Pan-Pearl River Delta (PPRD) Regional Cooperation
  - a) In 2014, PPRD partners signed the “Joint Declaration on Deepening Cooperation in the Pan-Pearl River Delta (2015-2025)”. The cooperation covers 11 fields and tourism is one important aspect.
  - b) In March 2016, The State Council issued the “Guiding Opinions on Deepening PPRD Regional Cooperation”, aimed at deepening Macao and PPRD cooperation and bringing overall cooperation to a higher level.
  - c) In October 2016, Chinese Premier Li Keqiang pledged support from the Central Government and announced there will be 19 new measures and policies to favour Macao, aimed at making better use of its position as a “World Centre of Tourism and Leisure” and “a commercial and trade cooperation service platform between China and Portuguese-speaking countries”.
  - d) In March 2017, Chinese Premier Li Keqiang announced in the “Annual Government Work Report” the initiative to study and formulate “the Guangdong-Hong Kong-Macao Greater Bay Area Urban Cluster Development Plan”.

Macao can further improve the transport link with Mainland China, promote the development of “multi-destination” tourism products and other tourism projects and foster the closer collaboration between Macao and its regional partners.

Figure 10.4: PPRD Cooperation Mechanism

10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.2 ANALYSIS OF EXISTING CONDITIONS

10.2.2 OVERVIEW OF REGIONAL TOURISM COOPERATION IN MACAO

- Guangdong-Hong Kong-Macao Cooperation
  The Macao, Guangdong and Hong Kong area is one of the most developed tourism regions in China. The Guangdong-Hong Kong-Macao tourism development mechanism has been running smoothly for more than 20 years.

  The “Framework Agreement on Cooperation between Guangdong and Macao” initiates a new Guangdong-Macao cooperation and includes a number of policy highlights covering the economy, society, culture, environment, transportation and livelihood in Guangdong and Macao.

  a) By the end of 2015, the Agreement have made substantial progress including: cooperative development of Hengqin, collaboration in promoting “multi-destination” travel, infrastructure, social and public services, regional cooperation planning, pilot exercise of the “Free Yacht Scheme”, development of MICE industry, joint development of cross-regional infrastructure projects and so on.

  b) Because of the nearby geographic locations, Hong Kong and Macao maintain a close and long-established cooperation. However, despite its importance, Hong Kong-Macao tourism cooperation is pending for a deeper, innovative and institutional integration.

  c) The “Master Plan of Tourism Development for Zhuhai” was announced in 2016 which specifies to promote closer cooperation between Macao and Zhuhai. In particular, it supports to explore the innovative collaboration mechanism of immigration procedures for foreign visitors, convenient customs clearance and bi-city cultural events. This could contribute to leverage the complementary advantages of both cities and expand the space for tourism development in Macao.

10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.2 ANALYSIS OF EXISTING CONDITIONS

10.2.3 KEY ISSUE - ACCESSIBILITY AND CUSTOMS CLEARANCE CONVENIENCE

In the future, three newly built/ upgraded Border Crossing Facilities (BCF) will be constructed, including two new BCFs of the Hong Kong-Zhuhai-Macao Bridge and the Guangdong-Macao New Channel, and the upgrading of Hengquin/ Lotus Bridge BCF. It is to gradually adopt the new customs clearance model of “Cooperative Check, One Clearance”.

- Hong Kong-Zhuhai-Macao Bridge will become a high-speed land connection between Macao and Hong Kong (International Airport), providing a huge opportunity for regional cooperation.

Convenient customs clearance is important, as it can significantly increase customs clearance efficiency.

- BCF infrastructure should be improved: Hengqin/ Lotus Bridge will be an important BCF between Macao and Mainland China. Due to incomplete transportation facilities and public transit system in Hengqin, the Island cannot carry large passenger flows and visitors are not enthusiastic to use the Hengqin/ Lotus Bridge BCF.

- It is critical to adopt the innovative customs clearance model and improve transportation facilities of Hengqin/ Lotus Bridge BCF in forming seamless transport connection between Macao and Mainland China. Although plans are available for further improvement, it takes time for implementation. There remains considerable uncertainty, therefore efforts are needed to accelerate the progress.

**Figure 10.7: Three major modes of transport between Guangdong, Hong Kong and Macao (Current and Future)**

- **Road**: The current major mode of transport between Guangdong and Macao, is mainly through Zhuhai to connect with other Chinese cities.
- **Ferry**: The current key transportation vehicle between Macao and Hong Kong, operated by two ship companies with a trip of about one hour.
- **Helicopter**: Costing more than HKD 2,000 and takes around 15 minutes to travel between Hong Kong and Macao.

**Future**

- **Hong Kong-Zhuhai-Macao Bridge**: Once completed, will provide extra land transportation and the travel time is approximately 30 minutes.

**Figure 10.8: Three Newly Built/ Upgraded Border Crossing Facilities**

- **Hong Kong-Zhuhai-Macao Bridge**
  - **Bridge Border Crossing Facility**
  - **Hong Kong-Zhuhai-Macao Bridge is expected to achieve readiness for commissioning by end 2017**
  - **Function**: Vehicles transit passage
  - **Future planning**: It is suggested to adopt the new customs clearance model of “Cooperative Check, One Clearance” and to reach initial agreement with the relevant Mainland authorities.

- **Guangdong-Macao New Channel**
  - **Year of opening**: 2019 expected
  - **Function**: Passenger transit passage
  - **Design**: Connecting Guangdong and Macao, it occupies a site area of about 28,000 m². It is a new pedestrian border checkpoint, including the exit/ entry building, the new footbridge and the exhibition centre for branded products from Guangdong and Macao.

- **Cotai Checkpoint Building (Hengqin/ Lotus Bridge BCF)**
  - **The expansion project of the Cotai Checkpoint Building is expected to complete in medium and long-term.**
  - **The Guangzhou-Zhuhai Intercity Railway is expected to link Hengqin in 2018, which is likely to increase visitor flows at the Hengqin/ Lotus Bridge BCF. Currently, the facilities at this BCF is inconvenient and it needs to be improved. In the future, the Macao Light Rapid Transit System (LRT) is planned to extend across the water boundary to Hengqin and create a transit station immediately accessible after CIQ clearance, which facilitates travellers to get on the LRT immediately after border inspection and thus to increase efficiency.**

**Source**: Hong Kong and Macao Affairs Office, the People’s Government of Guangdong Province Official Website
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.2 ANALYSIS OF EXISTING CONDITIONS

10.2.4 KEY ISSUE – FREE YACHT SCHEME

The Guangdong-Macao region is ready for the expansion of “Free Yacht Scheme”. But it is still faced with the issues like immigration and emigration, border defense and customs clearance, in terms of implementation of this scheme between Macao and other regional cities in the Guangdong province.

Development of the Free Yacht Scheme between Macao and Guangdong

- The “Guangdong-Macao Free Yacht Scheme” is one of the highlights of deepening Guangdong-Macao regional cooperation. After a certain period of time, substantial progress was made in November 2016, that the first pilot route of “Free Yacht Scheme” was launched.

1) In 2013, the “Letter of Intent on Cooperation of Free Yacht Scheme” was signed between Macao, Zhongshan and Nansha.

2) The Agreement on Cooperation of “Free Yacht Scheme” was signed between Guangdong and Macao, with Zhongshan as the first pilot city.

3) In 2015, “Guangdong-Macao Agreement on Maritime Affairs Concerning Pilot Scheme of Free Yacht Scheme” was signed between Guangdong and Macao.

4) On 23 November 2016, the Free Yacht Scheme between Macao and Zhongshan officially inaugurated.

Figure 10.9: Issues Remained for Further Expansion of the “Free Yacht Scheme” between Macao and Other Regional Cities

Figure 10.10: Guidebook for the Zhongshan-Macao Free Yacht Scheme

Source: Marine and Water Bureau
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.2 ANALYSIS OF EXISTING CONDITIONS

10.2.5 KEY FINDINGS AND GAP ANALYSIS OF MACAO TOURISM COOPERATION

Accessibility and customs clearance convenience

- Whilst the Hengqin/ Lotus Bridge Border Crossing Facilities (BCF) and the Guangdong-Macao New Channel are being upgraded and constructed, it should significantly reduce the travel time and distance between Macao and nearby cities upon completion of the Hong Kong-Zhuhai-Macao Bridge. Nevertheless, Macao-Zhuhai Border Crossing Facilities (BCF) and services still needs to be improved. It is critical to adopt the innovative customs clearance model and visa facilitation methods, to further promote the sustainable development of Macao’s tourism industry.

Free Yacht Scheme

- Macao and Guangdong are actively promoting the Free Yacht Travel pilot schemes. On 23 November 2016, the Zhongshan-Macao Free Yacht Scheme officially inaugurated and such scheme awaits further implementation between Macao and other regional cities.

Image Source: Macao Government Tourism Office
• Macao cooperates with many international tourism organisations.
• Macao has extensive framework cooperative agreements with Mainland China, Hong Kong and neighbouring cities.
• Improvement is still needed for the promotion plan targeted at “multi-destination” tourism products.

• There remain key regional issues including connectivity with Zhuhai and Hong Kong.
• The newly built and upgraded border crossings linked with public transportation are critical to Macao.
• Visa facilitation to Hengqin would allow greater regional cooperation between Macao and the neighbouring cities.
• Macao should try to acquire more recognizable international tourism rewards, in order to improve Macao’s reputation in the international tourism community.

• Public supports the regional tourism cooperation, particularly to provide more convenient visa policy for foreign visitors to enter Mainland China and to cooperate with the nearby cities on developing “multi-destination” travel.
• Public is very supportive of improved accessibly such as the soon-to-be completed Hong Kong-Zhuhai-Macao Bridge, Hengqin border upgrade, connection to regional airports and repositioning of MIA as a hub for low cost carriers.
The key objective is to **enhance Macao’s position as a core tourism city in the regional and international tourism community**. Macao is regarded as one of the leading tourist destinations in the region in terms of visitor arrivals; it has the potential to enhance this position by facilitating the regional visitor flows. In the future, Macao should improve its influence and reputation in the regional and international tourism community.

This key objective will be realised by the implementation of four key strategies:

- **Achieve Active Government Cooperation**: Macao needs to strengthen and extend mutually beneficial ties between Macao and the regional partners.
- **Provide Better Transport Connectivity and More Convenience for Visitors**: to cope with the growth of visitor arrivals, one key strategy is to improve border connectivity and provide visa facilizations for greater visitor convenience.
- **Provide Cross-boundary Tourism Products and Events**: due to Macao’s key challenges of land scarcity and lack of tourism product diversity, it can work with the nearby cities to develop themed “multi-destination” tourism product and bi-city events and activities to attract high-value visitors.
- **Enhance and Strengthen Macao’s Image as a Tourist Destination**: to enhance Macao’s image as the “World Centre of Tourism and Leisure,” Macao must continue to participate in the activities organised by the major world tourism organisations, improve its tourism ratings and attain more international tourism awards.
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.4 KEY OBJECTIVE AND STRATEGIES

10.4.1 STRATEGY 1: ACHIEVE ACTIVE GOVERNMENT COOPERATION

Macao has already signed extensive agreements on cooperative frameworks with the Pearl River Delta (PRD) Region and is gradually extending these ties to the Pan-Pearl River Delta (PPRD) areas. This will help to ensure a continued strengthening of the bilateral ties between Macao and its regional partners.

To foster Macao’s development into a “World Centre of Tourism and Leisure” by maintaining and further pushing forward the work of the established Joint Working Committee - attended by officials from the government entities concerned. The committee discusses issues in tourism cooperation and identifies responsible parties to tackle any obstacles and implement the required actions. Some key initiatives include:

• Continue to establish and preserve strategic partnerships between Macao and its regional and international partners.
• Based on the launch of the “Free Yacht Scheme” between Macao and Zhongshan, to push forward the implementation of the free yacht schemes to cover more cities.
• Joint promotion of new tourism products along the “Maritime Silk Road” countries.
• Improve the convenience and sufficiency of border crossing facilities for visitors.

The related action plans of this strategy will combine in the second strategy of “Provide Better Transport Connectivity and More Convenience for Visitors”.

*Image Source: Macao Government Tourism Office*
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.4 KEY OBJECTIVE AND STRATEGIES

10.4.2 STRATEGY 2: PROVIDE BETTER TRANSPORT CONNECTIVITY AND MORE CONVENIENCE FOR VISITORS

In order to enhance Macao’s position as the tourism hub in the Pearl River Delta Region, it needs to improve border connectivity and provide visa facilitations for greater visitor convenience. According to the research of UNWTO and WTTC, it is suggested that the ease of travel, including the visa facilitation measures and well linked transport infrastructure, contributes to the growth of visitor arrivals and their satisfaction levels.

Key strategies to provide better connectivity and visitor convenience include:

- Providing visitor convenience at border crossings.
- Continue to promote the “Cooperative Check, One Clearance” customs clearance model.
- Continue to promote the opening of Hengqin visa policy.
- Improving the connection between Macao and the Hong Kong International Airport.
- Improving accessibly through the soon-to-be completed Hong Kong-Zhuhai-Macao Bridge.
- Explore the possibility of improving maritime border affairs for yacht travels to enter Macao from some of the Mainland Chinese cities.

Some planning proposals regarding infrastructure provisions are already covered in the chapter of “Tourism Industry and City Development”. New planning proposal with action plans were designed to echo the remaining key issues that still need addressing through regional cooperation in this chapter.


Image Source: Government Information Bureau
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.4 KEY OBJECTIVE AND STRATEGIES

10.4.3 STRATEGY 3: PROVIDE CROSS-BOUNDARY TOURISM PRODUCTS AND EVENTS

Although Macao is faced with the issues of land scarcity and lack of tourism product diversity, it still has potential to capture a larger share of the fast-growing tourism market. One key strategy is to extend the tourist market by developing tourism products and events covering multiple cities and extending over a longer time period. Several initiatives are already in operation and should continue to further improve on an operational level:

• Jointly develop regional and international promotional activities, including the “multi-destination” tourism product.

• Joint-promotion along the “Maritime Silk Road” counties.

• After the launch of the “Free Yacht Scheme” between Macao and Zhongshan, aims to extend this scheme to cover more regional cities.

• Continuous development of cross boundary tourism products and events.

• Destination brand marketing towards certain visitor source markets, for example, the Portuguese-speaking countries which share the social and historical ties with Macao.

Among the above-mentioned initiatives, the target segment of the “Jointly develop regional and international promotional activities, including the ‘multi-destination’ tourism product”, is different from that of the “multi-day destination” described in the chapter of “Tourism Branding and Marketing Strategies”. The ‘multi-destination’ tourism product targets mostly the international visitors and attract them to pay a visit to Macao while travelling to the nearby cities.

Image Source: Macao Government Tourism Office
On an international level, Macao, in recent years, has proactively participated in the meetings and activities organised by the major international tourism organisations; it is important for Macao to continue this practice in order to enhance its global reputation.

Furthermore, it is important for Macao to earn recognition from the international tourism community through ratings and awards. Potential ratings and awards to increase Macao’s global exposure and to achieve its overall vision as the “World Centre of Tourism and Leisure” are listed below:

**Overall Competitiveness:**
- The Travel & Tourism Competitiveness Report by The World Economic Forum (WEF)
- “Tourism for Tomorrow Awards” by The World Travel & Tourism Council (WTTC)

**MICE and Business Travels:**
- “Top International Meeting City” by The Union of International Associations (UIA)
- “Asia’s Top Convention City” by The International Congress and Convention Association (ICCA)
- “World Festival & Event City Award” by The International Festivals & Events Association (IFEA)

**Retail and Dinning:**
- “Asia Pacific Shopping Centre Awards” by The International Council of Shopping Centers (ICSC)
- “The Globe Shopper Index Asia-Pacific” by Global Blue

**Major Social Media Tourism Rankings:**
- Top 25 Destinations by TripAdvisor
- 52 Places to Go by New York Times

Source: Project Team; Image Source: Macao Government Tourism Office
In order to achieve the key objective to **enhance Macao’s position as a core tourism city in the regional and international tourism community**, four key strategies were developed on the conceptual level, while three planning proposals were developed on the implementing level supported by short- and medium-term action plans.

**Strengthen Regional Government Cooperation in Key Issues**: integrate resource advantage, and to address the key issues of visa facilitation, border connectivity and so on between Macao and the regional governments.

**Jointly Develop Strategic Tourism Products with Nearby Cities and Other International Cities**: promote tourism cooperation between Macao and nearby cities and other international cities, in the form of joint promotions and tourism product development.

**Enhance International Recognition and Influence of Macao**: foster Macao’s position in the tourism industry by actively acquiring awards and ratings and to enhance its image of a “World Centre for Tourism and Leisure.”
10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

10.5 PLANNING PROPOSALS AND ACTION PLANS

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                     - 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 |
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                     - 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 |
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                     - P 8.3.2 Proactively enhance Macao’s position and reputation in the international tourism organisations |
### 10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

#### 10.5 PLANNING PROPOSALS AND ACTION PLANS

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**P 8.1** Strengthen Regional Government Cooperation in Key Issues | Short-Term Action Plans

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<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
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</table>
| P 8.1.1 | Continue to promote the “Cooperative Check, One Clearance” customs clearance model | • Improve convenience for visitors at the border crossing facilities. | • Continue to promote the implementation of “Cooperative Check, One Clearance” customs clearance model at the Hong Kong-Zhuhai-Macao Bridge border crossing facilities (BCF).  
• Upon implementation of the above mentioned customs clearance model at the Hong Kong-Zhuhai-Macao Bridge BCF, expand it to other border crossing facilities in accordance to the actual situation. | Macao SAR Government |
| P 8.1.2 | Expand the “Free Yacht Scheme” to cover more cities | • Foster yacht tourism between Macao and its nearby cities.  
• Extend the coverage of the “Free Yacht Scheme” to more destinations. | • Work with the Mainland government departments to accelerate the process of yacht tourism development.  
• Based on the “Free Yacht Travel” Pilot Scheme between Macao and Zhongshan, to expand the coverage to more cities in Guangdong, in particular Hengqin of Zhuhai, Qianhai of Shenzhen and Nansha of Guangzhou.  
• Work cooperatively with the Mainland government departments, in areas of developing safety code of practice for yachting, pilot qualifications and other marine related issues. | Maritime and Water Area |
### 10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

#### 10.5 PLANNING PROPOSALS AND ACTION PLANS

**P 8.1** Strengthen Regional Government Cooperation in Key Issues | Medium-Term Action Plans

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<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
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| P 8.1.3 | Promote more convenient border crossing and visa policies between Macao and Hengqin | • Providing travel convenience and facilitation for visitors, in the areas of border crossing facilities and visa policies. | • Explore the possibilities of providing greater convenience in customs check and logistics arrangements for Macao residents and visitors who travel through the border between Macao and Hengqin.  
  • Through the more relaxed visa policies, to attract more multi-destination trips for international visitors traveling from Macao to Hengqin. | Macao SAR Government                                                                                         |
## 10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

### 10.5 PLANNING PROPOSALS AND ACTION PLANS

#### P 8.2 Jointly Develop Strategic Tourism Products with Nearby Cities and Other International Cities | Short-Term Action Plans

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<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
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<tbody>
<tr>
<td>P 8.2.1</td>
<td>Further explore the cross boundary tourism products and promote the joint tourism marketing</td>
<td>• In line with the &quot;Belt and Road&quot; Initiative, continue to explore the possibilities of jointly develop diversified tourism routes with the various tourism related regional departments</td>
<td>• To jointly work with the Mainland cities and other international cities for promotion of the “multi-destination” and expand the geographical coverage of such tours. To join forces and promote the new tourism products together with the members of the “China Maritime Silk Road Tourism Promotion Alliance”, so as to utilise the established platform and enhance the joint marketing efforts towards countries along the Silk Road.</td>
<td>Tourism Area</td>
</tr>
<tr>
<td>P 8.2.2</td>
<td>Deepen exchange and cooperation with Portuguese-speaking countries</td>
<td>• To deepen cooperation with the Portuguese-speaking countries, and increase visitor arrivals from these markets. • Joint tourism promotion with the Portuguese-speaking countries.</td>
<td>• Conduct a comprehensive study regarding the promotion plans, resources allocations and strategies, towards the visitors from the Portuguese-speaking countries. • Launch destination branding activities based on the shared social and cultural ties between Macao and the Portuguese-speaking countries. To attract more visitors from these markets through themed tours or promotions. • Based on the signed agreements between Macao and tourism training provisions to the Portuguese-speaking countries, to strengthen the ties between Macao and the local tourism associates in those countries. This is also to coordinate and push forward the tourism cooperation between Macao and the Portuguese-speaking countries in various areas.</td>
<td>Tourism Area</td>
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</table>
### P 8.2 Jointly Develop Strategic Tourism Products with Nearby Cities and Other International Cities | Medium-Term Action Plans

<table>
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<th>No.</th>
<th>Action Plan Title</th>
<th>Description of Action Plan</th>
<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
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</table>
| P 8.2.3 | Organise bi-city events in the fields of culture, sports and tourism            | • To diversify Macao’s tourism products into the fields of tourism, culture and sports, attract visitors to Macao and its nearby cities.  
• To generate more visitors arrivals and increase visitor length of stays to both Macao and its nearby cities.  | • Jointly host cultural, sports and tourism events between Macao and its nearby cities in the region.  
• Macao can strengthen the existing projects or adopt new initiatives to develop into the bi-city events like sports exchange events, themed tourism events, and so on.  
• To jointly host sports events and activities together with the nearby cities, so as to build them into a series of events in regular intervals. | Tourism, Culture and Sports Areas |
### 10. INTERNATIONAL AND REGIONAL TOURISM COOPERATION AND DEVELOPMENT

#### 10.5 PLANNING PROPOSALS AND ACTION PLANS

<table>
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<tr>
<th>No.</th>
<th>Action Plan Title</th>
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<th>Specific Actions</th>
<th>Respective Area</th>
</tr>
</thead>
</table>
| P 8.3.1 | Improve Macao’s tourism ratings and attain more tourism awards | • Promote Macao’s image as a “World Centre of Tourism and Leisure” and be recognised by the international tourism community. | • Constantly update information regarding the international tourism awards, encourage and assist the industry partners to achieve these international awards. This is to lift up the qualities of tourism industries in Macao and be in line with the international standards of tourism services.  
• Identify the list of tourism ratings and awards that Macao can target for, such as the “Travel & Tourism Competitiveness Index (TTCI)” by the World Economic Forum (WEF).  
• Form strategic partnership with the eminent travel rating organisations to promote Macao’s image as a core tourism city. | Tourism Area |
| P 8.3.2 | Proactively enhance Macao’s position and reputation in the international tourism organisations | • Actively participate in the meetings and activities held by the international tourism organisations, so as to enhance Macao’s participation in the international tourism affairs. | • Submit the application to join the UNESCO Creative Cities Network (UCCN), with the target to become one of the recognised “City of Gastronomy”. Encourage the communication between the whole society of Macao with other cities within the UCCN. Through cross regional interactions, it is to stimulate more mutually beneficial cooperation.  
• Proactively strengthen Macao’s participation in the meetings and trainings held by the major international tourism organisations. Through the international cooperation and collaboration, to further promote Macao’s reputation and competitiveness as an integrated tourist destination in the international tourism community. | Tourism Area |
CHAPTER 11

CONCLUSION
11. CONCLUSION
11.1 OVERALL SUMMARY

Summary:

Macao is positioning itself as the World Centre of Tourism and Leisure as it develops into a quality international tourist destination. 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. The Macao SAR Government has also drafted the “Five-Year Development Plan” (2016-2020) for the Macao Special Administrative Region (the “Five-Year Plan”) with the goal to stabilise the economic growth, expedite the city’s transformation into the “World Centre of Tourism and Leisure”, and improve the livelihood of local residents.

Under the guidance of the “Five-Year Plan”, the Macao Tourism Development Industry 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, the Master Plan proposes short, medium, and long term strategies for the improvement and enhancement of Macao’s tourism in all aspects.

The Macao Tourism Industry Development Master Plan has gone through important procedures and steps, including extensive baseline assessments, interviews with the stakeholders, international forums, expert advise, worldwide best practices references, analysis of future trends and a comprehensive and informative public consultation process. Sufficient communication with the stakeholders and collection of their recommendations were ensured thorough the study process. The Master Plan brings together the aspirations of the tourism industry and the residents of Macao to promote tourism development, enhance benefits and reduce the potential negative impacts.

A Comprehensive Plan for an Industry with Wide Impact: As a result of the tourism industry’s comprehensive nature and its wide impact, the Macao Tourism Industry Development Master Plan covers an extensive range of areas, policies, government departments, businesses, associations and communities. With the overall vision of Macao as a “World Center of Tourism and Leisure”, the Master Plan identifies issues, objectives, strategies, planning proposals and action plans necessary to achieve this vision.

Image Source: Macao Government Tourism Office
Master Plan: The Macao Tourism Industry Development Master Plan should be used as a plan, a guidance manual or an action planning, leading Macao tourism industry’s sustainable development. In order to implement the Master Plan's content and suggestions, there will be different meetings, consultation activities, agreements, investments, and so on to make it happen. The Master Plan is not a regulatory guideline, but should the overall objectives be followed, it could be implemented flexibly.

Relationship between the 10 Key Issues and the 8 Key Objectives: Macao is striving to become a world-class tourist destination with convenient accessibility, leisure and recreational elements and full of opportunities; Macao will be developed into a city enjoying international standards of living, work, transportation, tourism and entertainment. In order to achieve the goal of transforming Macao into the “World Centre of Tourism and Leisure”, the Macao tourism industry needs to improve and enhance itself according to the 10 key issues identified in the Master Plan, and the 8 key objectives proposed by the Master Plan will facilitate Macao to effectively tackle the challenges arisen from the key issues.
11. CONCLUSION
11.1 OVERALL SUMMARY

Realising the Objectives: In the Master Plan, the 8 key objectives and strategies are formulated from the conceptual level to develop directions and range for development, whereas the planning proposals and action plans are concrete measures proposed at the execution level.

Planning proposals include concrete description, rationale and key results. The action plans are with execution programme and content, and are expected to be fulfilled in the short term (0-5 years), medium term (6-10 years) and long term (10+ years).

Implementation: The implementation of the action plans in the Macao Tourism Industry Development Master Plan involves different areas of the SAR Government. Besides the need to expand the depth and the width of the cross-departmental, cross-area and cross-level collaboration at the government sector, the support and corporation from the industry, local associations and general public are pivotal for the successful implementation of the Macao Tourism Industry Development Master Plan.

The Process from Objective to Action
11. CONCLUSION
11.1 OVERALL SUMMARY

Overall Goal: 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

Supported by 33 Strategies

Implemented By 29 Planning Proposals

69 Short Term Action Plans (0-5 years)
19 Medium Term Action Plans (6-10 years)
3 Long Term Action Plans (10+ years)

Total Action Plans =91
11. CONCLUSION

11.2 LIST OF SCENARIO FORECASTS

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 rate.

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 carrying capacity in accommodating a high volume of visitors and minimise negative impacts.

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>Low Visitor Growth Scenario Year 2025 Estimate</th>
<th>Modest Visitor Growth Scenario Year 2025 Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Visitor Arrivals</td>
<td>30.95 million</td>
<td>33 to 35 million (1%-2% visitor growth per annum)</td>
<td>38 to 40 million (3%-5% visitor growth per annum)</td>
</tr>
<tr>
<td>Visitors’ Non-Gaming Spending</td>
<td>USD 6.6 billion</td>
<td>USD 12 to 13 billion</td>
<td>USD 13 to 14 billion</td>
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<tr>
<td>Average Length of Stay of Overnight Stay Visitors</td>
<td>2.1 Days</td>
<td>2.3 Days</td>
<td>2.3 Days</td>
</tr>
<tr>
<td>Percentage of Overnight Stay</td>
<td>50.7%</td>
<td>56%</td>
<td>53%</td>
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<tr>
<td>Number of Hotel Rooms</td>
<td>37,634</td>
<td>48,600</td>
<td>51,900</td>
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<tr>
<td>Tourism Related Employment*</td>
<td>242,000</td>
<td>258,000</td>
<td>295,000</td>
</tr>
<tr>
<td>Hotel Occupancy Rate</td>
<td>83%</td>
<td>82%</td>
<td>84%</td>
</tr>
</tbody>
</table>

*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.
11. CONCLUSION
11.3 EVALUATION MECHANISM

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 additional 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.
The tourism industry in Macao requires the collaboration and cooperation among the government, the industry partners, associations and the local community. Each of them should realise the importance of cooperation for the success of the tourism industry.

The government’s role, for one, should enact public policies and practices that will bring about positive change and development to the industry. Working together with industry stakeholders, associations and local residents should help public bodies identify potential issues and work together towards delivering positive results. Transport, infrastructure, cultural facilities, and labour resources are some topics which require close coordination between all parties to solve the tourism related topics.

While the government has a strong hand in implementing policy, the industry partners’ participation and collaboration is required, like hotels and travel agencies are responsible to welcoming guests and providing services and amenities, which plays an important role in Macao’s tourism image. Some action plans proposed by the Master Plan also require the participation and coordination of efforts between parties, for example, for labour and environmental legislations, which are typically decided upon by the government; the industry partners, associations and local residents should get involved into the practices where applicable.

Many action plans proposed in the Master Plan involve coordination between the government, organisations and industry partners.

**The Government** – Besides the tourism related departments, the success of tourism development would also require the participation and professional expertise of many relevant departments pertaining to culture, sports, planning, transportation, technology and security. Government departments need to collaborate and communicate to ensure and achieve the desirable future tourism development.

**Industry Partners** – Hotels, casinos, travel agencies as well as other SMEs are the key members in offering tourism products and services. They often have the direct contact with visitors and therefore have a strong understanding of the market trends and needs of the visitors. The industry should be more vocal in sharing their experience and knowledge with the government, providing suggestions and ideas in the formulation of new policy or regulation changes. Meanwhile, the industry partners are the key participants toward some of the strategies as addressed in the Macao Tourism Industry Development Master Plan. Therefore, there should be strong support from the industry partners on the actual implementation and execution for their business to grow, while at the same time to facilitate the healthy development of the industry.

**Associations** – Various types of associations are composed of experts from different fields of the industry. These groups have a deep understanding of the local tourism industry and have the platform to consolidate ideas from members and residents through different channels, which can contribute to the government at times of policy formulation and regulation changes.

**Local Residents** – Local residents are the heart and pulse of the city, being the human resource supply to the entire industry. The local residents should actively participate in professional training programme to meet the development of the industry, which will not only improve self-quality, but also provide high quality service and help the industry to reach a higher level of development. Although not every single resident is involved in the tourism industry, any tourism development or activities will directly have impact on the residents’ daily life and interests. Therefore, local residents should actively communicate with the government and provide suggestions, which in turn can also increase the local residents’ sense of belonging to the tourism industry.
11. CONCLUSION
11.5 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 have 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 formation of the “Comprehensive Industry of Leisure Tourism” which emphasises the role of tourism to stimulate economic growth and the development of other related industries. The “Holistic Tourism Destination” and “Comprehensive Industry of Leisure Tourism” carry the same development concept. The “Macao Tourism Industry Development Master Plan” is formulated with the concept of “Comprehensive Industry of Leisure Tourism” 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. Following the execution and 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 Initiatives 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 tourist 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”.

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**11. CONCLUSION**

**11.5 FUTURE PERSPECTIVES**

### Resilience to Overcome Challenges:

The Macao Tourism Industry Development Master Plan gives 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 adopt to changes yet maintaining the overall objectives. As travel preferences change, dynamic marketing and social media allow 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. 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.

*Image Source: Macao Government Tourism Office*
Chapter 12
Appendices
### Project Team Name List

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<thead>
<tr>
<th>Commissioning Entity</th>
<th>Macao Government Tourism Office</th>
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<tr>
<td>Implementation Entity</td>
<td>Organisational Planning and Development Department</td>
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<td>Planning Entity</td>
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<td>Technical Assistance Entity</td>
<td>CITA Planning &amp; Design Ltd.</td>
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<th>Project Team Members</th>
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<tbody>
<tr>
<td>Chris YOSHII</td>
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<tr>
<td>Jasmin ABAD</td>
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<td>Bryan CHEN</td>
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<tr>
<td>Beth CHANG</td>
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<td>Jade LAM</td>
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<td>Heather LI</td>
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<td>Kamiena WONG</td>
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<td>Lina LI</td>
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<td>Jessica LEUNG</td>
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<td>Terry CHAN</td>
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<td>Daisy Hui LONG</td>
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<tr>
<td>Gigi AU</td>
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<tr>
<td>Dr. David GALLACHER</td>
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<tr>
<td>Jacqui SHI</td>
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## Project Team Name List

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<tr>
<th>Expert Panel Members</th>
<th>Technical Support Entity Members</th>
<th>International Forum’s Expert Representatives</th>
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<tr>
<td>BAO Jigang</td>
<td>LUI Chak Keong Andre</td>
<td>Bill CALDERWOOD</td>
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<td>CHON Kye Sung Kaye</td>
<td>LAM Iek Chit</td>
<td>Tom FARNEY</td>
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<td>FONG Ka Chio Davis</td>
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<td>HUTCHISON, Jonathan Mcdougall</td>
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<td>IEONG Tou Hong</td>
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<td>KESTER, Johannes Gijsbertus Cornelis</td>
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<td>SO Yuk-Chow Jacky</td>
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<td>VONG Chuk Kwan Fanny</td>
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<td>XIE Fei Fan Philip</td>
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<td></td>
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<td>Dain SIMPSON</td>
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Note: Listed in Portuguese/ English last name’s alphabetical order
Acknowledgement

The Macao Tourism Industry Development Master Plan has the support and participation of many tourism industry stakeholders. Hereby, the Macao Government Tourism Office would like to express our gratitude to all departments and entities which have contributed their assistance and feedback in the planning process.

Government Entities

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<td>Sports Bureau</td>
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Note: Listing order according to the Macao SAR Government Portal
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Note: Listed in Portuguese/ English last name’s alphabetical order
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### Industries and Associations/ Others

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Besides the above organisations/ associations, the Macao Government Tourism Office would like to express the gratitude to our residents, government departments, enterprises and associations who have contributed feedback and opinions during the planning process and the public consultation.
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