THE 6TH UNWTO ASIA/PACIFIC EXECUTIVE TRAINING PROGRAM ON STRATEGIC TOURISM PLANNING

Session 3: Tourism Observatories and Strategic Tourism Planning in China

“Positioning and Planning of Macau as a World Centre of Tourism and Leisure”

25-28/06/2012, Bhutan
1. About Macau

2. Tourism Situation

3. Positioning & Policy

4. Planning to Build a World Centre of Tourism & Leisure

5. Sustainable Tourism
About Macau
Located at the Pearl River Delta of the southeastern coast of Mainland China.
Macau SAR

Population: 562,900
Total Area: 29.9 km²

**Macau Peninsula:** 9.3 km²

**Taipa Island:** 7.4 km²

**CoTaI Area:** 5.6 km²

**Coloane Island:** 7.6 km²
Accessibility

**Air**
- Macau International Airport
- Outer Harbour Maritime Terminal (helicopter)

**Sea**
- Inner Harbour
- Outer Harbour Maritime Terminal
- Taipa Temporary Ferry Terminal

**Land**
- Barrier Gate in Macau Peninsula
- The COTAI Frontier Post

*Air-to-Sea or Sea-to-Air transfer Service*

New SkyPier at Hong Kong International Airport
- Opened on 15 Jan 2010
- Check-in counter on Level 5, Transfer Area E2, Terminal 1, HKIA
Tourism Situation
Arrivals of Total Visitor & International Visitors 1995-2011 (excluding the Greater China)

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of Total Visitors</th>
<th>No. of International Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>7,752,495</td>
<td>998,988</td>
</tr>
<tr>
<td>2011</td>
<td>28,002,279</td>
<td>3,041,447</td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>2012 Jan-May*</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Visitor Arrivals</td>
<td>28,002,279 (+12.2%)</td>
<td>11,471,000</td>
</tr>
<tr>
<td>Overnight Stay</td>
<td>12,925,160 (46.2%)</td>
<td>5,322,000</td>
</tr>
<tr>
<td>% of total VA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Length of Stay</td>
<td>(Apr) 1.0</td>
<td>(Apr) 1.1</td>
</tr>
<tr>
<td>(day)</td>
<td>(Apr) 1.5</td>
<td>(Apr) 2.1</td>
</tr>
<tr>
<td>Total Visitor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overnight Stay Visitor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel Overnight Guests</td>
<td>8,612,127 (62.3%)</td>
<td>2,948,365 (Jan-Apr)</td>
</tr>
<tr>
<td>% of total OS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per-capita Spending</td>
<td>202.4</td>
<td>236.4 (Q1)</td>
</tr>
</tbody>
</table>

Source: DSEC  
* Provisional data
Visitor Arrivals 2012 Jan-May *

Greater China (Mainland China, HK, Taiwan)

10,220,000 (+3.6%)

International Markets

1,250,000 (+4.3%)

11,471,000 (+3.7%)

Mainland China 60.1%

Hong Kong, China 25.4%

Taiwan, China 3.6%

International markets 10.9%

Source: DSEC
* Provisional data
Visitor arrivals by top 10 major source markets in 2011 and 2012 Jan-May *

<table>
<thead>
<tr>
<th>Markets</th>
<th>2011</th>
<th>Markets</th>
<th>2012Jan-May*</th>
<th>% Change (Y-o-Y)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainland China</td>
<td>16,162,747</td>
<td>Mainland China</td>
<td>6,890,000</td>
<td>(+9.8%)</td>
</tr>
<tr>
<td>Hong Kong SAR</td>
<td>7,582,923</td>
<td>Hong Kong SAR</td>
<td>2,915,000</td>
<td>(-6.0%)</td>
</tr>
<tr>
<td>Taiwan, China</td>
<td>1,215,162</td>
<td>Taiwan, China</td>
<td>414,000</td>
<td>(-15.2%)</td>
</tr>
<tr>
<td>Korea (ROK)</td>
<td>398,807</td>
<td>Korea (ROK)</td>
<td>184,000</td>
<td>(+12.6%)</td>
</tr>
<tr>
<td>Japan</td>
<td>396,023</td>
<td>Japan</td>
<td>171,000</td>
<td>(+12.5%)</td>
</tr>
<tr>
<td>Malaysia</td>
<td>324,509</td>
<td>Philippines</td>
<td>126,000</td>
<td>(+16.0%)</td>
</tr>
<tr>
<td>Singapore</td>
<td>280,602</td>
<td>Malaysia</td>
<td>124,000</td>
<td>(-3.6%)</td>
</tr>
<tr>
<td>Philippines</td>
<td>268,710</td>
<td>Thailand</td>
<td>87,000</td>
<td>(-6.8%)</td>
</tr>
<tr>
<td>Indonesia</td>
<td>220,423</td>
<td>Singapore</td>
<td>81,000</td>
<td>(-18.0%)</td>
</tr>
<tr>
<td>Thailand</td>
<td>196,375</td>
<td>USA</td>
<td>77,000</td>
<td>(+2.7%)</td>
</tr>
</tbody>
</table>

Source: Macau Statistics and Census Service
* Provisional data
### Hotel Sector

#### Hotel

<table>
<thead>
<tr>
<th>Category</th>
<th>hotels</th>
<th>rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>★★★★★</td>
<td>8</td>
<td>3,679</td>
</tr>
<tr>
<td>★★★★★</td>
<td>19</td>
<td>11,402</td>
</tr>
<tr>
<td>★★★★</td>
<td>14</td>
<td>5,717</td>
</tr>
<tr>
<td>★★★</td>
<td>14</td>
<td>2,830</td>
</tr>
<tr>
<td>★★</td>
<td>13</td>
<td>841</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>68</td>
<td>24,469</td>
</tr>
</tbody>
</table>

#### Guest Houses

<table>
<thead>
<tr>
<th>Category</th>
<th>Guest house</th>
<th>rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>★★★</td>
<td>4</td>
<td>120</td>
</tr>
<tr>
<td>★★</td>
<td>29</td>
<td>519</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>33</td>
<td>639</td>
</tr>
</tbody>
</table>

#### Total

<table>
<thead>
<tr>
<th></th>
<th>2011 May</th>
<th>2012 May</th>
<th>% change 11/12</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>96</td>
<td>101</td>
<td>5.2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>22,359</td>
<td>25,108</td>
<td>12.3%</td>
</tr>
</tbody>
</table>

As of May 2012 Macau Government Tourist Office
2007

Altira Macau
The Venetian Macau-Resort-Hotel
MGM Macau

2008

Grand Lisboa
Sofitel Macau at Ponte 16

2009

City of Dreams
Crown Tower
Grand Hyatt
Hard Rock

L’Arc Hotel Macau
2010
The Mandarin Oriental, Macau

Wynn Macau Expansion Project

2011
Galaxy Hotel
Hotel Okura
Banyan Tree Macau
2012

Sands Cotai Central

- CONRAD MACAU, COTAI CENTRAL*
- HOLIDAY INN MACAU, COTAI CENTRAL*
- Sheraton

* First phrase opened on April 11, 2012
3 to 5-stars Hotel Average Occupancy Rate

- 2012 Jan-May: 86.7%
- Diff. 11/12: +0.7

Source: Macau Hotel Association

3 to 5-stars Hotel Average Room Rate

- 2012 Jan-May: US$179.4
- % change: +9.4%

Average Length of Stay Of Hotel Overnight Guests (night)

- 2011: 1.53
- 2012 Jan-Apr: 1.47
- Diff. 11/12: -0.06

Total no. of occupied rooms*

- 2011: 6,576,032
- 2012 Jan-Apr: 2,284,431
- % change: +15.6%

*Estimated figures by MGTO based on statistics provided by DSEC
Total Visitor Expenditure:

2011
US$36.0 billion (+30.3%)

2012 Q1
US$9.6 billion (+19.8%)

- **Gaming**
  - 19.6%
  - US$8.3 billion

- **Accommodation**
  - 15.0%
  - US$224 million

- **Others**
  - 22.6%
  - US$1.0 billion
International Tourist Arrivals and International Tourism Receipt

According to UNWTO, Macao (China) ranks the 20th position in terms of the World’s international tourist arrivals and ranks the 5th position in Asia and the Pacific region in 2010.

Also, in terms of international tourism receipt, Macao (China) ranks the 11th position among other destinations in the world and ranks the 3rd position in Asia and the Pacific Region in 2009.

Source: UNWTO Tourism Highlights, 2011 Edition
Positioning & Policy
World Centre of Tourism and Leisure

- “The Outline of the Plan for the Reform and Development of the Pearl River Delta” (December 2008)
- The National “Twelfth Five-Year Plan” (March 2011)
- Guangdong-Macau Co-operation Framework Agreement (March 2011)
Strategies

1. Tourism Master Plan to Build the World Centre of Tourism and Leisure
2. Optimization of Administrative Operation and Improvement on Tourism Legislation
3. Improve Industry Management and Creation of a Quality Tourism Brand
4. Consolidate Tourism Source Market and Innovative Promotion
5. Consolidate Tourism Product Mix to Create the Atmosphere of Leisure Tourism
6. Enhance Regional and International Tourism Cooperation and Exchange
Planning to Build a World Centre of Tourism and Leisure
Series of Works Target on “Towards a World Centre of Tourism and Leisure”

- Round Table Seminar on “How to build a World Centre of Tourism and Leisure”
- Co-operational Planning for Guangdong-Hong Kong-Macau Regions
- Conference on Macau as a World Centre of Tourism and Leisure in Beijing
- PATA Task Force conduct study on the city’s positioning as a World Centre of Tourism and Leisure
- Macau SAR Government Commissioned the China’s Academy of Social Science to Conduct a Research
Local Community participation

Round Table Seminar on “How to build a World Centre of Tourism and Leisure”
June 2011

MGTO organized the Round Table Seminar to provide a platform for sharing ideas and suggestions on how to achieve the goal of developing Macau into a World Centre of Tourism and Leisure.
Regional level

Participating in preparation of “Cooperational Planning of Guangdong, Hong Kong and Macau Regions”

Discussion version of the Plan was published in May, 2012, and it is expected that the final version will be completed by 2012.
National Level

Conference on Macau as a World Centre of Tourism and Leisure

November 2011, Beijing

Office of the Macau SAR in Beijing and MGTO co-organized the “Conference on Macau as a World Centre of Tourism and Leisure” in Beijing, to discuss the policies and plans required to achieve the positioning of Macau as a “World Centre of Tourism and Leisure”.
International Expert Opinions

PATA / Macau Task Force conduct study on the city’s Tourism Positioning as a World Centre of Tourism and Leisure

Macau Government Tourist Office (MGTO) has requested PATA to establish a task force for providing expert opinions in determining the future tourism policies and plans required to achieve the positioning of Macau as a World Centre of Tourism and Leisure. The Public Release of the report was held on June 19 during MGTO Marketing Meeting.
Planning Elements Towards the Positioning of a “World Centre of Tourism and Leisure”

1. Urban Planning
2. Regional Cooperation
3. Quality Tourism
4. Cultural Tourism
City Development

Reclamation Area : 3.5 km²

- Area A is located at the east of Macau Peninsula.
- Area B is located at the south.
- Area C, D and E lie horizontally at the north of Taipa.

Complementary development of old and new districts
Urban Planning

The Planning of the Ruins of St. Paul’s

Camões area

Area of Ruins of St. Paul’s

Praça do Tap Seac

The Avenida Almeida Ribeiro and Inner Harbour district

St. Lazarus Church District
Urban Planning

Planning of Barra Surroundings

To stimulate the development of cultural industry by strengthening traditional catering and preserving local culture within the district.

To stimulate the development of cultural industry by reutilizing old buildings within the district.
Urban Planning: Infrastructure and Accessibility

- Nam Van Lake (ground level station)
- Outer Harbor
- Sai Van Lake (underground station)
- Barra (underground station)
- Macau Stadium
- Sai Van Bridge (ground level station)
- Cotai Checkpoint
- Airport
- Macau Dome

Infrastructure

• Conceptual Plan of Border Gate and Surrounding Area
• New Ferry Terminal
• Master Plan for Macau International Airport
• Macau Light Rapid Transit (LRT) System
• Hong Kong-Zhuhai-Macau Bridge
Regional Cooperation

Participation in International Tourism Organizations

- World Tourism Organization (UNWTO)
- Pacific Asia Travel Association (PATA)
- International Congress & Convention Association (ICCA)
- Asia Pacific Economic Cooperation (APEC) Tourism Working Group
- The Asian Association of Convention and Visitor Bureau (AACVB)
Regional Cooperation

Frameworks of Regional Cooperation

- CNTA
- Pan Pearl River Delta
- Guangdong, Hong Kong & Macau
- Guangdong & Macau
- Macau-Shenzhen; Zhongshan-Zhuhai-Macau; Jiangmen-Macau;
Quality Tourism

1. Key points for Contracts between Travel Agencies and Tour Operators Handling Mainland Tour Groups to Macau

2. Promote “Quality and Honest Macau Tour”

3. Supervision on the Tourism Industry

4. Prohibiting Illegal Accommodation

5. Revision of Legislation

6. Tourism Hotline
Tourism Related Projects

- Optimization of Tourism Signage
- Online booking platform of Budget Accommodation
- Mobile applications & new interactive tourism website
- E-guiding Service
In line with Macau SAR government’s objective to utilize Macau’s high quality world cultural heritage tour as the main tourism product, cross-departmental cooperation will focus on the utilization and improvement of tourism and cultural resources, so as to achieve a closer integration and interaction between tourism and various cultural elements.
Cultural Tourism Development

1. Macau Temples and Churches Project
2. Macau Tourism and Cultural Activities Centre
3. Student Excursion Incentive Scheme
4. Macau Harbour Cruise
5. Night Time Activities
6. Weekend Cultural Performance
Sustainable Tourism
Sustainable Tourism

1. Ongoing Projects

2. Future Planning
Macao Green Hotel Award

- The Award is organized by the Environmental Protection Bureau (DSPA) and co-organized by the Macau Government Tourist Office. It is also supported by the Macau Hoteliers and Innkeepers Association, the Macau Hotel Association, the Macau Productivity and Technology Transfer Center and the Macao Hotel Employees Association.

- The Award was launched to raise the awareness of the importance of environmental management in Macao's hotel industry and commend those hotels which have adopted environmental measures.

Source: Environmental Protection Bureau
Sustainable Tourism - Ongoing Projects

Eco-Tourism

Macao Giant Panda Pavilion
Opened on Jan. 18, 2011
PATA / Macau Task Force Summary of Recommendations on Adopting a Sustainable Tourism Development Approach

- The Comprehensive Tourism Master Plan for Macau should adopt a sustainability charter for the destination and establish a range of destination benchmarks for social, economic and environmental health that can be used to guide and track the performance of the industry.

- Macau should introduce a suitable international sustainability accreditation program which can then be universally applied across the industry. Ultimately, the industry must take responsibility for its own environmental performance.

- Develop a best practice sustainable tourism guidebook which can be openly shared with all sectors of the industry. The book can be included on a sustainability portal maintained by the government and address: sustainable design and construction; sustainable operational principles for reducing water, waste and energy; and green procurement.
• Establish a cluster of sustainable operators who can be used as a best practice model for the entire destination.

• Establish a voluntary industry contribution program which can be used to support community based environmental initiatives including waste recycling and vegetation planting.