Tourism Situation

Macau Positioning and Goals in 2011

Planning of Macau as a Global Centre of Tourism and Leisure
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Planning of Macau as a Global Centre of Tourism and Leisure
<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011 Jan-Apr</th>
<th>% Change (Y-o-Y)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Visitor Arrivals</strong></td>
<td>24,965,411</td>
<td>8,769,627</td>
<td>6.6%</td>
</tr>
<tr>
<td><strong>Overnight Stay</strong></td>
<td>11,925,871 (47.8%)</td>
<td>3,979,422 (45.4%)</td>
<td>0.2%</td>
</tr>
<tr>
<td>% of total VA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Hotel Overnight Guests</strong></td>
<td>7,755,214 (65.0%)</td>
<td>1,918,955 (Jan-Mar) (65.9%)</td>
<td>1.9%</td>
</tr>
<tr>
<td>% of total OS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Per-capita Spending (US$)</strong></td>
<td>189.8</td>
<td>189.5 (1Q)</td>
<td></td>
</tr>
</tbody>
</table>
Visitor Arrivals 2011 Jan-Apr

Greater China (Mainland China, HK, Taiwan)

7,823,714 (+7.9%)

International Markets

945,913 (-3.1%)

Mainland China 56.4%

Hong Kong, China 28.4%

Taiwan, China 4.4%

International markets 10.8%
Visitor arrivals by top 10 major source markets in 2011 Jan – Apr

1. Mainland China: 4,949,705 (+12.8%)
2. Hong Kong, China: 2,488,047 (+2.8%)
3. Taiwan, China: 385,962 (-12.7%)
4. South Korea: 132,295 (+22.0%)
5. Japan: 123,814 (-6.5%)
6. Malaysia: 102,276 (-11.6%)
7. Philippines: 82,925 (-2.9%)
8. Singapore: 78,296 (+1.4%)
9. Thailand: 75,301 (-9.5%)
10. U.S.A.: 60,141 (+1.6%)
### 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>3,684</td>
</tr>
<tr>
<td>deluxe</td>
<td></td>
<td></td>
</tr>
<tr>
<td>★★★★★</td>
<td>18</td>
<td>9,938</td>
</tr>
<tr>
<td>★★★★</td>
<td>13</td>
<td>4,530</td>
</tr>
<tr>
<td>★★★</td>
<td>14</td>
<td>2,830</td>
</tr>
<tr>
<td>★★</td>
<td>12</td>
<td>801</td>
</tr>
<tr>
<td>Subtotal</td>
<td>65</td>
<td>21,783</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>27</td>
<td>456</td>
</tr>
<tr>
<td>Subtotal</td>
<td>31</td>
<td>576</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total</th>
<th>2010 May</th>
<th>2011 May</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>92</td>
<td>96</td>
</tr>
<tr>
<td></td>
<td>20,749</td>
<td>22,359</td>
</tr>
</tbody>
</table>

% change 10/11: 4.4% to 7.8%

As of 20 May 2011 Macau Government Tourist Office
3 to 5-stars Hotel Average Occupancy Rate

2011 Jan -April: 85.9%
Diff. 10/11: +1.4

Source: Macau Hotel Association

3 to 5-stars Hotel Average Room Rate

2011 Jan -April: US$164.6
% change: +16.8%

Length of Stay (night)

2010: 1.54
2011 Jan-Mar: 1.54
Diff. 10/11: 0.02

Total no. of occupied rooms*

2010: 5,715,576
2011 Jan-Mar: 1,514,811
% change: +11.6%

*Estimated figures by MGTO based on statistics provided by DSEC
Global Center 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. Optimizing the Role of Industry Management and Enhancement of Tourism Service Quality

2. Participation in Cross-departmental Cooperation, and Enhancement of Tourism Environment and Facilities

3. Promotion through creative means and Creation of a Brand New Thematic Image

4. Opening up the regional level cooperation and Creation of Tourism Platform at International Level
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Regional Cooperation

Cultural Tourism Development

Planning

Urban Development

Quality Tourism
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)
Frameworks of Regional Cooperation

CNTA

Pan Pearl River Delta

Guangdong, Hong Kong & Macau

Guangdong & Macau

Macau-Shenzhen; Zhongshan-Zhuhai-Macau; Jiangmen-Macau;
Complementary development of new and old district

Light Rapid Transit System
Border Gate Expansion Project

Started operation before 2010
Chinese New Year

New Ferry Terminal

Macau International Airport Expansion Project

Hong Kong-Zhuhai-Macau Bridge
Quality Tourism

MGTO and Culture, Sports and Tourism Administration of Shenzhen Municipality signed a ‘Memorandum of Cooperation on “Quality and Honest Macau Tour” on 21 April, 2010

- To facilitate healthy development of the two places’ tourism industries.

- To protect “Macau Tour” market order.

- To combat irregularities: “Zero-fare” tours & “negative-fare” tours.
Betterment of Tourism Environment

- Reinforced inspection carried out at tourist attractions and entry points.
- Inspection point set up at the Ferry Terminal to combat illegal tour guides.
- Random inspection performed more frequently to packaged tours.
- Reminders about service quality sent regularly to the industry.
- Inspectors supported the 24-hour tourism hotline through which tourists complaints were handled and assistance to tourists were rendered immediately.
- Exchange of experience and information with neighbouring places.
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.
Development project on Macau’s temples and churches

“Tourism and Cultural Activities Centre”
Working Plan

Reactivating World Heritage

Tourism Transportation
Tourism Signage, and Walking System

Cultural Tourism Development

Tourism and Supporting Facilities

www.icm.gov.mo
Regional Cooperation

- Identify and explore suitable elements which can be transformed into resources