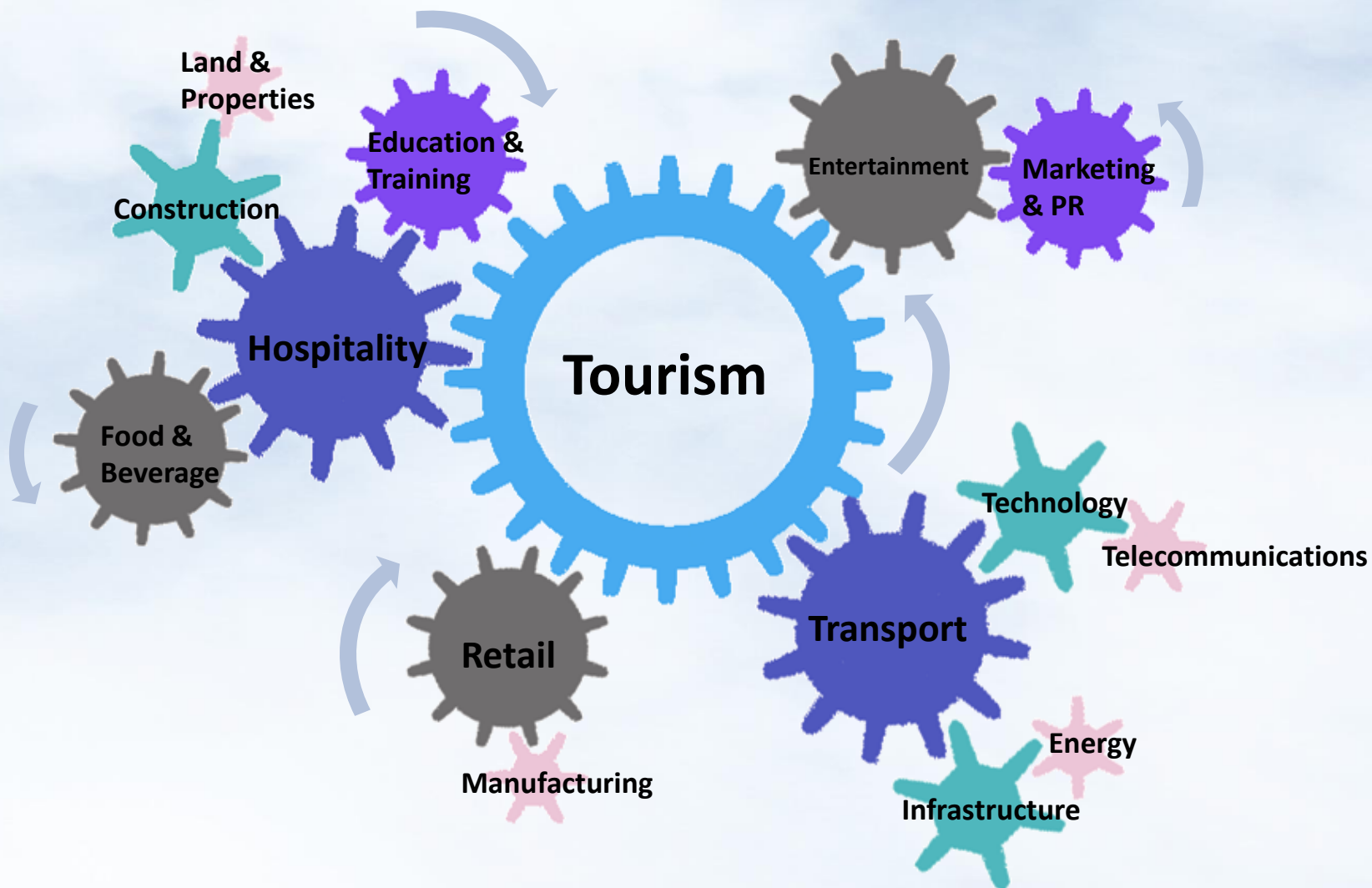




Private Sector Challenges and Opportunities Inherent in Advancing the Complete Visitor Economy (CVE)

Presentation by Ms. Pansy Ho, Managing Director of Shun Tak Holdings Limited

Interconnection and interdependence

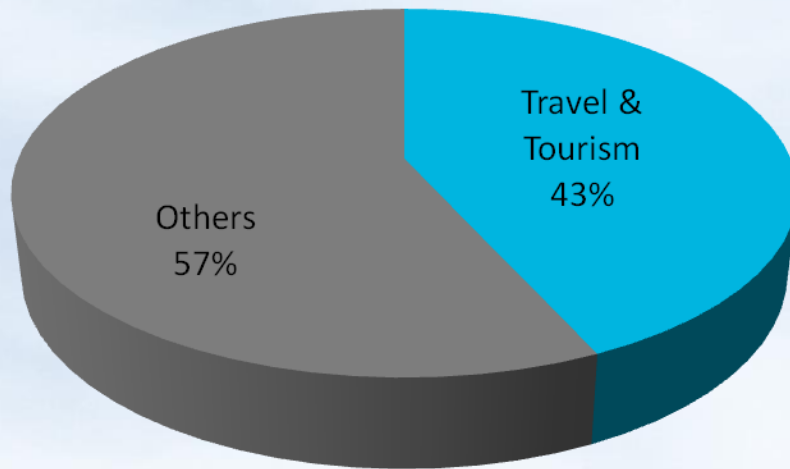




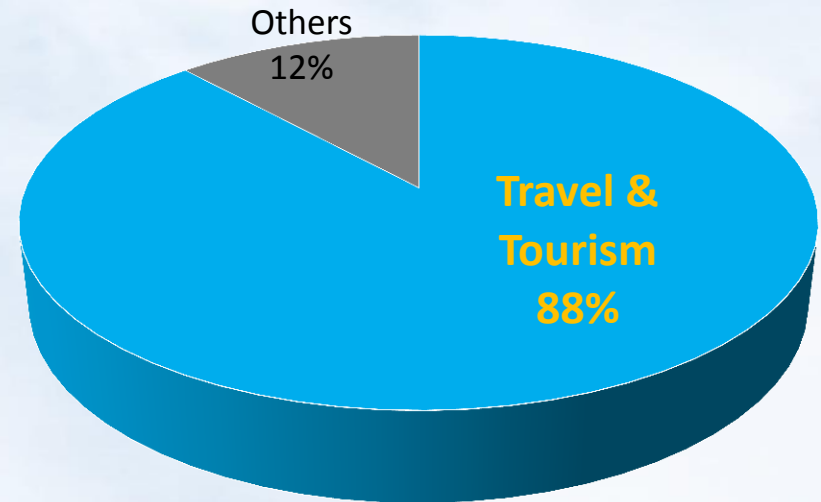
Macau: A Perfect Epitome

Macau Economy Structure

Direct GDP Contribution
from Travel & Tourism



Direct & Indirect GDP Contribution
from Travel & Tourism



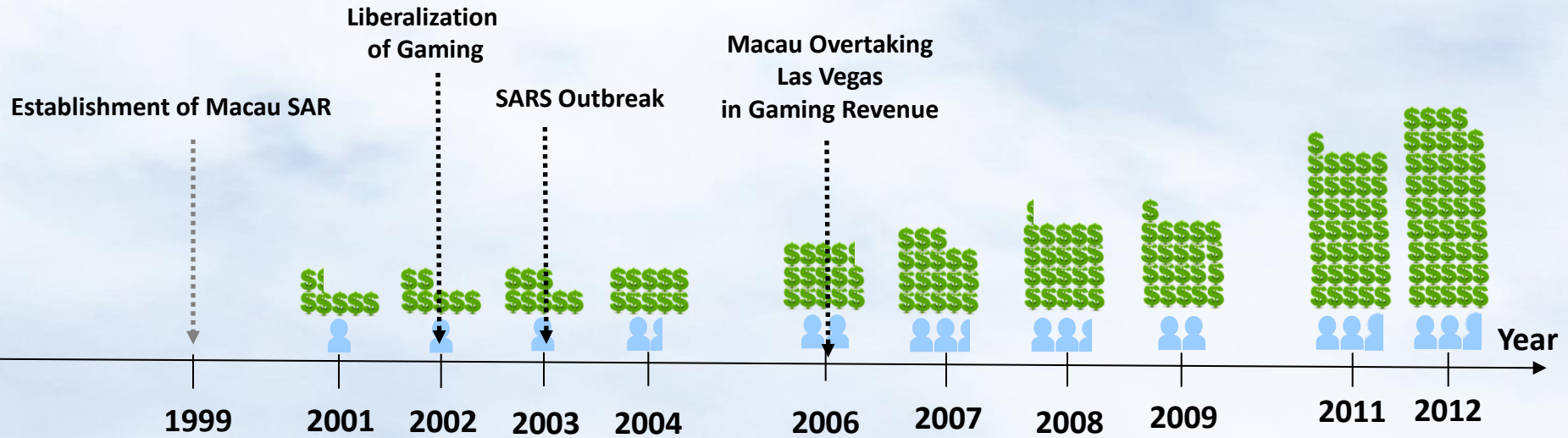
Source: WTTC Travel & Tourism Economic Impact 2012 - Macau




A Supportive Government

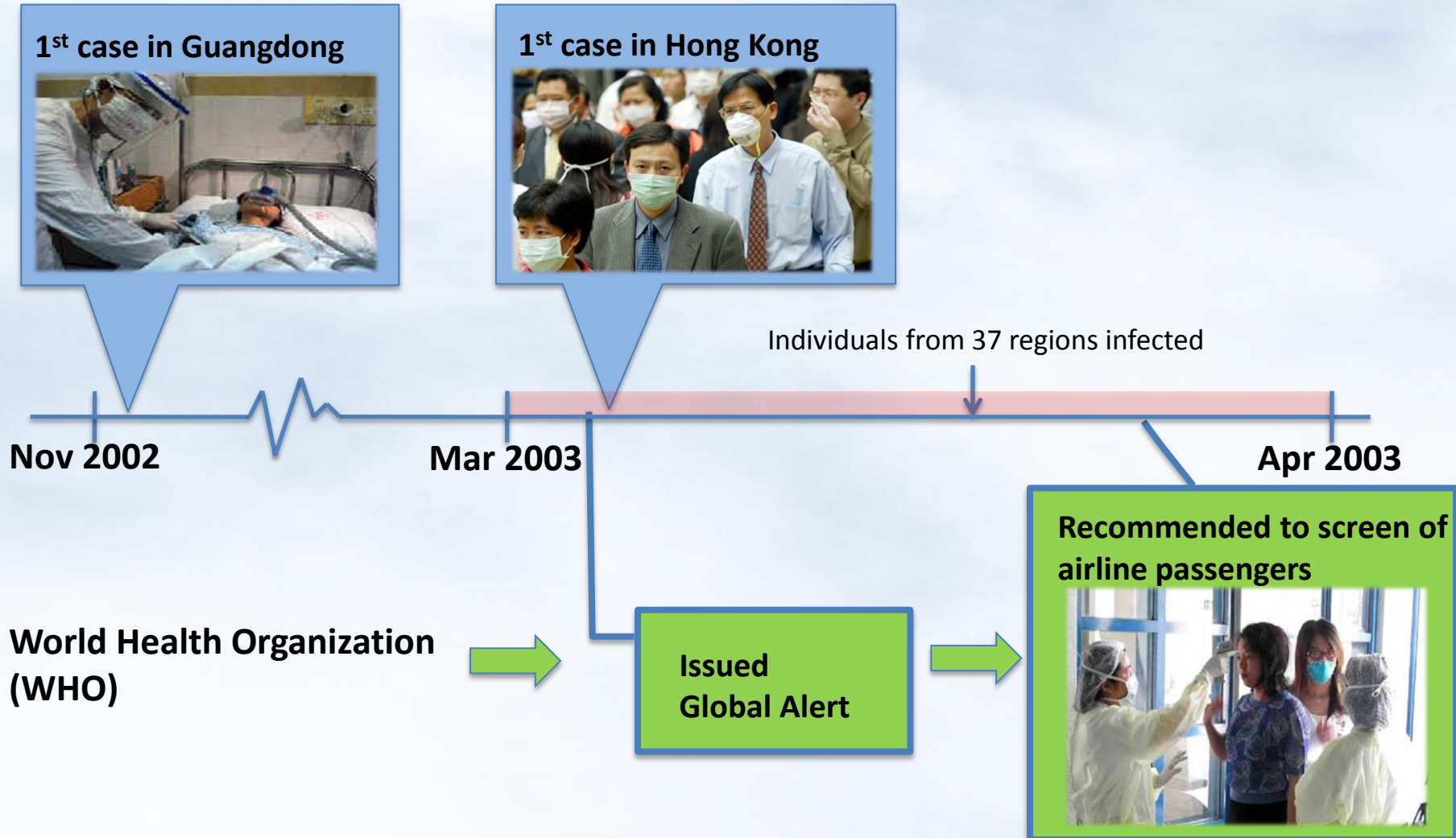


CVE as lever of growth



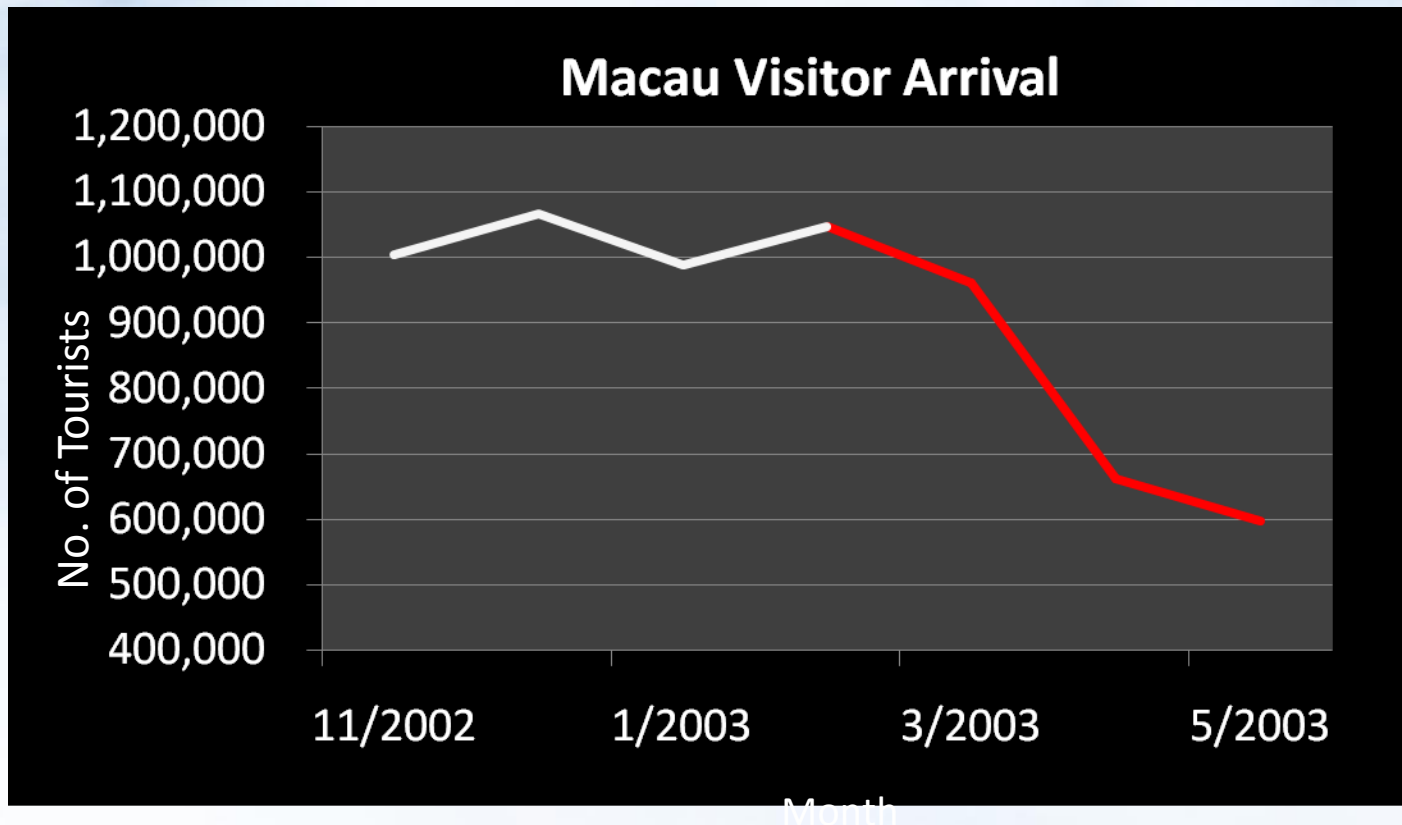
1  = US\$1B GDP of Macau

CVE as recovery vehicle: SARS



Unprecedented drop in visitor arrivals

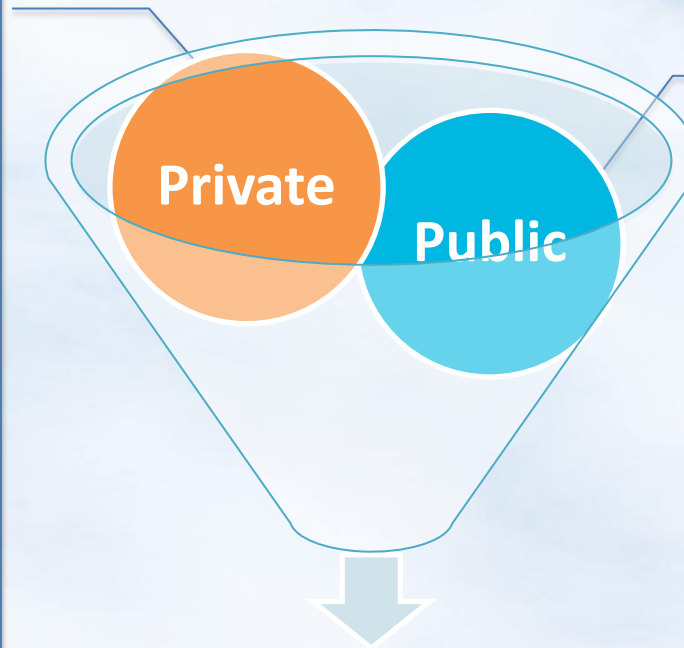
In April, May and June 2003, Macau experienced a 33.8%, 36.8% and 5.4% yoy drop in visitor numbers.



Post crisis recovery: public and private alliance

“Private Sector”

- Complemented the Government’s strategies and initiatives
- Stayed open and be creative
- Polled together resources of various industries and companies
- Cross-industry promotional offers



Tourism Revival

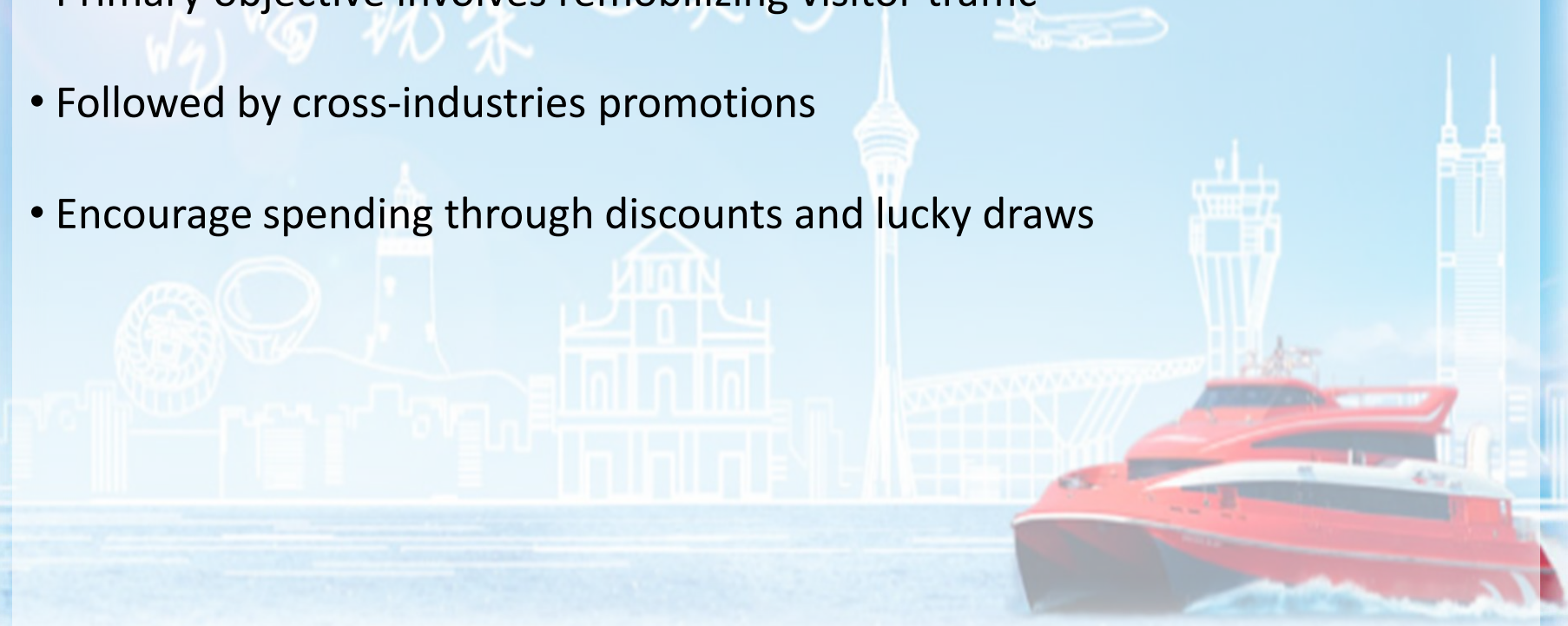
“Public Sector”

- Coordinated efforts from the tourism industry
- Post-crisis marketing and communication
- Provided subsidy
- Formulated recovery policy & strategies

“Macau’s So Cool” Campaign

- Led by the private sector
- Primary objective involves remobilizing visitor traffic
- Followed by cross-industries promotions
- Encourage spending through discounts and lucky draws

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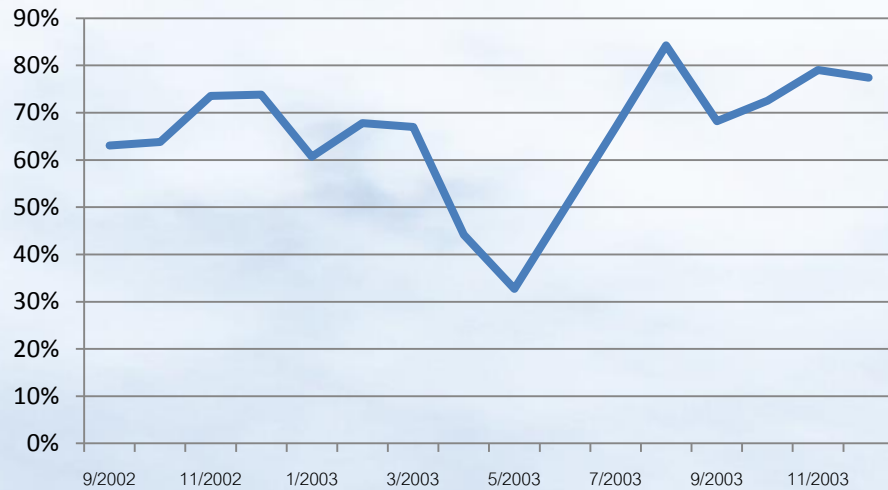
“Macau Welcomes You in Summer” Campaign



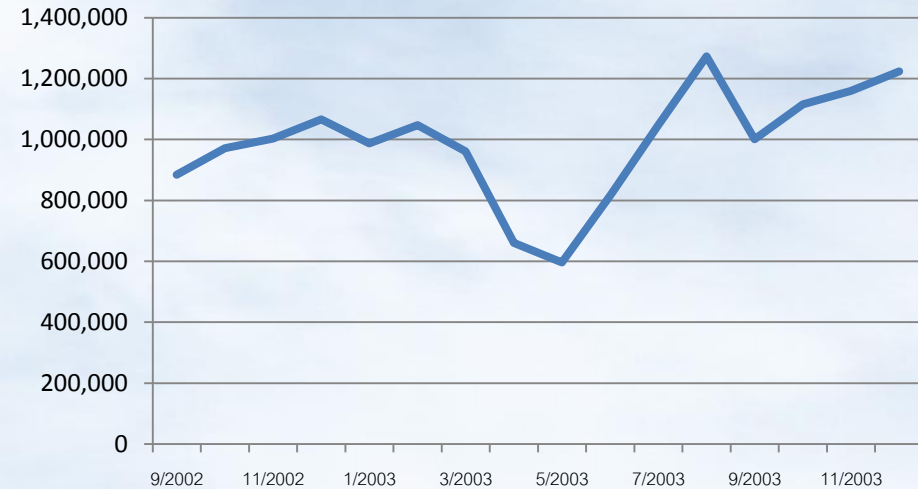
- A US\$6.3M campaign
- shopping discounts, music festivals, lucky draw etc.
- Tourism facility improvements

Restoration

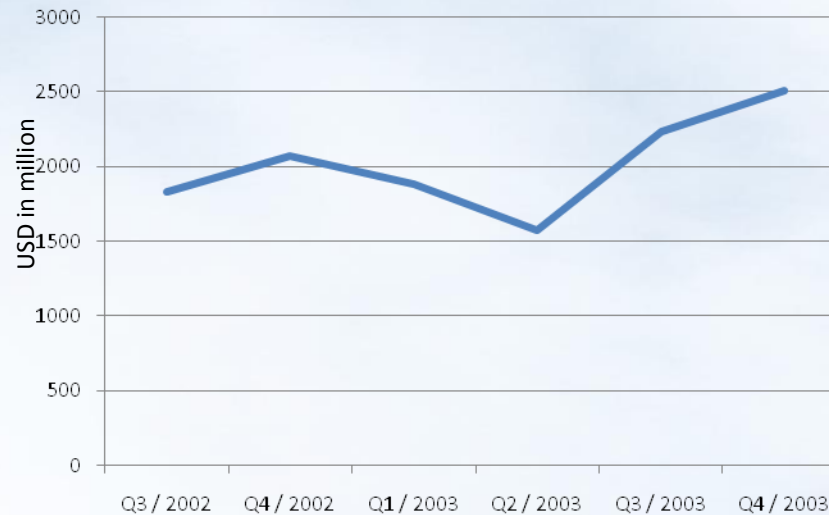
Hotel Occupancy Rate



Visitors Arrival



Macau GDP





Thank you!

