

CASINOS AS A TOURISM REDEVELOPMENT STRATEGY —THE CASE OF MACAO

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摘要：博彩業在西方國家發展蓬勃，預計在不久將來，在亞洲國家的發展速度會更加迅猛，而澳門博彩業市場的開放更扮演一個重要角色。憑藉優越的地理位置，澳門博彩業利潤可觀，在博彩專營權實際開放之前的2003年，全年博彩總收入超過33億美元。隨著更多大型賭場的興建，澳門有望成為“亞洲的拉斯維加斯”。

本文以最近澳門博彩業之開放作個案分析，研究與博彩業的合法化及市場開放有關的旅遊發展問題，以及對其它亞洲國家和地區的啟導作用。作者介紹了旅遊目的地生命週期中某一階段之博彩業發展，討論博彩業對經濟、社會及環境的影響，及與之密切相關的，諸如社會承受力、居民對博彩業及生活質素的看法等問題。

作者認為，作為旅遊業的組成部分，賭場的發展和建設必須有良好規劃和管理。本文討論了澳門博彩業在目前的歷史發展轉折點所面對的挑戰，其中包括如何保存澳門獨特的歷史文化遺產，如何建立自己獨特的“亞洲博彩業發展模式”，以強化及發展旅遊業。利用博彩業來振興旅遊業是本文要探討的重點，因為澳門博彩業的開放引起了其它亞洲國家和地區對發展博彩業的興趣，他們也希望藉此豐富其旅遊產品。澳門現在所面對的旅遊業發展問題，不久的將來也可能成為整個亞洲地區都要面對的問題。

Introduction

Gambling in Macao has existed almost from its outset, with the legalisation of gambling in Macao in the 1850's to raise much needed funding for colonies such as Timor (Gunn, 1996), and a casino monopoly market that lasted in Macao from the 1930's to 2002 with the most recent monopoly concession holder being Sociedade de Turismo e Diversoes de Macau (STDM) from 1962 to 2002 (McCartney, in press). Hong Kong and China do not permit legalised casino gambling, and therefore this spatially restricted legal location within China ensured Macao has enjoyed a comparative advantage and thus been exceedingly lucrative.

Nevada is equally a success story as it was possible to secure itself as a gaming monopoly jurisdiction by being the first and for a long time, the only state in the US where gaming was legal.



However, as more states in the US legalised casinos to generate tax revenues and contributions towards social and infrastructures projects (Eadington, 1996), casino saturation also slowly set in, 'build it and they will come' became less of a certainty. Some casino jurisdictions as a result 'stagnated' leading many to look at redevelopment strategies and alternatives. Stansfield (1998) also warned that in the face of stiffer and newer competition there would be a greater need to match these new standards or be permanently eclipsed, 'casinos, even entire resorts, that fail to build anew, expand, remodel, and diversify their total attractions packages to meet the new industry standards risk an image of losers-faded, obsolescent facilities no longer worth a visit' (ibid, 48).

With Macao, it benefits from having a border-location strategy essentially feeding off the Hong Kong and China outbound tourist markets (common to other jurisdictions such as Canada capturing large pockets of border populations in the US, and Egypt capturing the Israeli market). Such a strategy will only remain successful however as long as the target market remains gambling-free and thus making it necessary for a regulatory environment to sustain this economic structure (Przybylski, Felsenstein, Freeman & Littlepage, 1998), such is the case of Macao. Collins (2004: 102) also writes that 'the general lesson from gambling destination casinos is that people don't travel to them in order to gamble unless they have no choice' and mentions Macao as such a destination, going on to write that 'Macao has been a highly successful gambling destination, even though it has had a very murky reputation and its casinos hitherto have exhibited the poor standards of quality characteristics of businesses which are effective monopolies. Its success has been due to that fact that in neighbouring Hong Kong and elsewhere in the region casinos are illegal.'

Essentially, the casino monopoly that has existed in Macao has been in a non-competitive condition, favouring one side of the border to China and Hong Kong. As examined by Felsenstein & Freemant (2001: 511), the 'border is a favorite site for the development of casinos, particularly if a large market exists on the other side', warning that this can be a precarious situation dependent on the conditions that exist on the adjacent locations on the other side.

The Macao Government after having a gaming monopoly of over 60 years, of which the STDM casino monopoly lasted for the last half of this, chose to open one of the world's most lucrative gaming concessions to international organisations (McCartney, in press). In 2002, Macao sat as the world's third largest gaming market, and with gambling revenues of US\$3.5 billion in 2003, the year saw an increase of 27% on 2002 (Healy, 2004), with gaming revenues accounting for around 70% of total Macao government revenue. The liberalisation process has catapulted Macao in terms of casino revenues, with Macao generating 56% more table win than the Las Vegas Strip and 196% more than Atlantic City, on 450 tables in 2003 (Bowie, 2004), putting Macao in a key position to rival both Atlantic City and the Las Vegas strip, and in particularly as more casino properties open in the future.



The government by liberalising the industry has also set in motion this potential for further tourism redevelopment. The new concession holders, and particularly Wynn Resorts and The Venetian are convinced that the Las Vegas experience and the massive development plans for Macao can help transform Macao's gaming industry (Lopes, 2003), creating a 'Las Vegas in Asia'. Macao does benefit greatly from its monopoly border-location strategy with China (and Hong Kong), having adopted legalised gaming for such a long sustainable period of time. However, tourism development issues now emerge after casino liberalisation and in how Macao as a tourism destination would wish to reposition and be identified to maintain its competitive edge in the long term at what is a significant milestone in its long gaming history. Such issues gain particular importance given that other neighbouring tourism destinations are looking to either legalise or revamp their own gaming industry.

Gaming and infrastructure development post-liberalisation

In 2001, the Macao Government passed regulatory framework calling for the opening up of Macao's casino industry to international bidding. By tender closed off in the same year, 21 tenders were received and based on predetermined judgment criteria formulated by the government, termed as 'Administrative Regulation 26/2001', awarded the new concessions to three casino companies, namely SJM (Sociedade de Jogos de Macau, a subsidiary of STDM), Wynn S.A. (Sociedade Anónima) and Galaxy S.A. (which included a partnership with The Venetian, Las Vegas which was to split upon winning the concession to essentially form two competing concessionaires), thereby ending Macao's gaming monopoly. While the government may however have restricted the casino concessions to three, each of the three concessionaires may grant sub-concessions and operate as many casinos and gaming tables as market conditions allow, although each casino, sub-concession and gaming table must be separately licensed by the government.

According to the concession agreements, the three new gaming concessionaires are obligated to fulfill their projected investment plans totaling approximately US\$2.24 billion, with Wynn Resorts, Macau to have a resort hotel and casino opened to the public by December 2006, and Galaxy (with the sub-concession, The Venetian) to have two resort hotels and casinos opened to the public by June 2006 (McCartney, in press). With 72 various lodging establishments and a total of 9,375 available rooms already in Macao (Statistics and Census Service, Macao, 2004a), the Galaxy Waldo Hotel and Casino (opened in 2004) added 100 rooms, with its flagship casino, Galaxy Star World Hotel to add later further 600 rooms scheduled to open in 2005 (Shun Tak Holdings Limited, 2004). Wynn Resorts, Macau will include 580 rooms in a total area of 65,000 sq. m when opened in 2006, along with SJM's 1000 additional hotel rooms (in a total area of 10,650 sq. m) projected to open by 2005, and a recently signed joint venture with MGM to have a total gaming site of approximately 61,000 sq. m (ibid). While The Venetian's first casino, 'The Sands', built on 91,506 sq. m, contains



only 51 room-suites, its anchor property 'The Venetian, Macau' will include 1,500 suite rooms (Jones Lang LaSalle Hotels, 2003). The Macao Government has also committed large resources to the building of various sporting and recreational facilities, investing over US\$155 million on new buildings to initially host the 4th East Asian Games in 2005 (McCartney, 2003a).

With tourism arrivals at 11.9 million in 2003, which was already surpassed by the third quarter in 2004 (Statistics and Census, Macao 2004b), these construction and tourism figures are particularly impressive when considering Macao's total limited landmass of 26.8km² and population of 441,600 inhabitants (ibid). With the unveiling of The Venetian's plans to develop Macao, a vision of re-creating a Las Vegas strip in Macao (Cotai area) with 20 casinos and 60,000 hotel rooms was put forward (Jones Lang LaSalle Hotels, 2003). Such massive infrastructure development now raises external and internal considerations and challenges on the strategic long-term planning and management of Macao as a tourism destination.

Tourism development

Casinos can form part of tourism product offerings, being bundles or packaged together in bringing an enhanced entertainment and enjoyment experience for the tourist. However it has been shown that the casino tourist can display different sociodemographic profile than the non-casino tourist in terms of age, income, education levels, marital status and education level (Morrison, Braunlich, Liping & O'Leary, 1996). This therefore indicates the possibility of a tourism segmentation strategy for casino and non-casino tourists.

A rationale behind the opening of Macao's gaming industry and on choosing the new casino concession holders was on widening tourism market segments to one that is not primarily on the gaming tourist which is presently the case, but attractive for tourism markets such as the meetings and exhibitions industry (McCartney & Kong, 2003). At present, many visitors to Macao are short-trip by nature, or 'day-trippers' but as yet little is known on this market segment (i.e. percentage of repeat visitors). Average room night stay has remained fairly constant at around 1.2 to 1.3 room nights for several years, with only 3.04 million of the 11.9 million travellers to Macao in 2003 actually staying overnight in a hotel or guest-house (Statistics and Census, Macao 2004a), although average room occupancies increased in 2004 from 64% in 2003 to 74% mid-2004 (ibid).

As commented by Roehl (1996: 61), 'mere availability, which may have ensured success in the less-competitive environment of the past, is no longer a sufficient lure. Successful gaming destinations will be those properties that understand consumer gaming behavior and develop gaming products that are both appealing to consumers and profitable.' Innovation is slowly underway within the Macao gaming industry with a greater focus on service, themed casinos, slot parlours (with



coffee shop attached) and restaurant development. However, those non-gaming facilities such as meeting and exposition space, large entertainment shows and events, and more premium brand shops, reflective on Las Vegas' success as not being primarily a gaming destination, are allotted more for the newer developments, and it is with these that can help to further widen and differentiate the Macao tourism market.

Legalising or liberalising - the case for tourism development

Those factors that influence the need for a destination to liberalise the gaming industry (such as Macao or the UK) may differ from those destinations considering casinos for the first time, for many being an economic panacea for depleted government coffers or to prevent economic leakage to neighbouring gaming jurisdictions by residents traveling outside to gamble. A common objective though for those gaming destinations being influenced to reorganise its gaming industry (appendix 1) and those considering to legalise for the first time (appendix 2) is as a drive to revitalise tourism.

Macao had several strategic objectives behind casino liberalisation, from developing its gaming sector into a world-class operations to provide for additional economic development and social stability (Commission for the First Public Tender to Grant Concessions to Operate Casino Games of Chance of the Macao SAR, 2001), to an overall enhanced international image and reputation whereby newer tourism markets and segments could emerge. Destinations in decline and without gaming are faced with the choice of a focus on gaming introduction or the development of other possible tourism products, which could include concentrating on theme parks, special interest tourism (such as sport and cultural tourism), or the convention and meetings industry. Should casinos be chosen, several important public policy decisions such as to the type of casino industry introduced and how to monitor and regulate the industry would then need to be made.

Nevertheless, there is a growing popularity in the gaming industry worldwide with the 'ability of the industry to propel a tourism industry from crisis and depression to growth' (Israeli & Mehrez, 2000: 282); such is the scenario facing Asia. The casino liberalisation and legalisation process expected across Asia will ultimately attract and stimulate further competition from neighbouring jurisdictions, and as suggested by appendix 2, casino proliferation should ultimately occur.

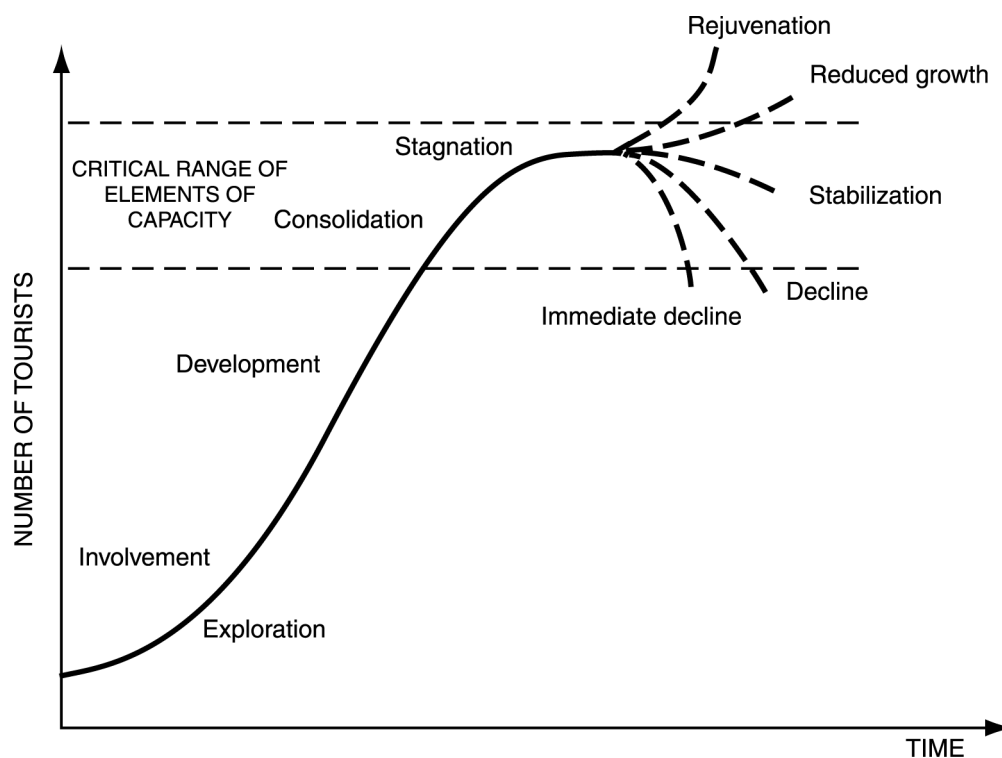
However, in order for destinations to maximise casino net economic benefits, the casinos must continue to function as a tourism attraction, patronised by visitors from outside, thereby generating new wealth for the jurisdiction (Smith & Hinch, 1996). This is equally apt for destinations such as Macao and emerging regional gaming jurisdictions, a moot issue being to minimise the social and environmental impacts of such developments (and discussed below). A consideration though, is that destinations will only choose casino introduction or development at a certain stage of its tourism

development cycle, and perhaps due to the perceived negative impacts generally associated with casinos, this may be at a later than introductory stage of the destination life cycle.

Casinos and the destination life cycle

A tourism destination as suggested by Butler (1980), will go through the stages of involvement, development, consolidation, and stagnation (figure 1). In the Gaming Liberalisation and Non-Gaming Destination Development Models (appendices 1 and 2 respectively) this decline can be due to a combination of influencing factors such as competition from a similar destination or neighbouring destination, safety and security concerns or maintaining an unattractive undifferentiated tourism product. However, even as destination stagnation approaches, it has been suggested that the tourism destination life cycle can be extended or revitalised by planning and implementing strategic developments which can include newer attractions (Beneditto and Bojanic, 1993, cited in Priestley and Mundet, 1998), such as theme parks, heritage site or convention and exhibition facilities. Macao's position along its tourism destination life cycle would warrant further research, although the introduction of new style casinos through casino liberalisation could be seen as assisting as a rejuvenation strategy of the tourism industry. Similarly, such a concept can be applicable for Asian destinations, which are considering the introduction of legalised casinos to not only reap the economic benefits, but also as a catalyst in tourism development.

Figure 1 Tourist Destination Life Cycle





The tourism life cycle looks essentially at social carrying capacity thresholds, and as such requires strategic destination planning and management responses during the various stages in order to prevent deterioration and stagnation. During stagnation, while tourists may be accommodated, the social problems and impacts can generate resident opposition to growth and development (Priestley & Mundet, 1998). With gaming development in particular, social impacts can be more pronounced (such as the emergence of problem gambling).

In Macao, visitor arrivals fluctuated from 8.2 million in 1996 to 11.5 million in 2002 (Statistics and Census Service, Macao 2004b), exceeding the WTO (1995) forecast of 11.2 million visitors to Macao by 2010 (World Tourism Organization, 2000). Tourism arrivals again increased to 11.9 million in 2003 (Statistics and Census Service, Macao 2004b), which also saw the opening of the first new casino by one of the newly awarded concession holders, The Venetian ('The Sands Casino, Macao') followed by The Galaxy Waldo complex, and by the third quarter of 2004 arrivals were already at 12.2 million. With massive casino and hotel complex development plans underway, indications are that tourism arrivals will continue to rise.

Research however suggests that the host community's inability to cope with accumulating tourism impacts will lead to a drop in tourists arrivals (Upchurch & Teivane, 2000), with a greater need for the destination to monitor the rate and level of maximum development, and to maintain it within these limits to reduce impacts on the environment to sustainable levels (Butler 1980, cited in Priestley & Mundet, 1998). Therefore, the challenge will be in minimising the environmental and social impacts brought about by such developments.

Social impacts and resident attitudes

While the presence of casinos brings well-pronounced and apparent economic benefits, there is also a need to remain aware of the social and environmental impacts of such developments, which will ultimately influence resident attitudes. When looking at casino impacts, Long (1996: 352) found that 'all jurisdictions report unanticipated problems, new pressures, the need for constant monitoring and similar concerns. To build toward long-term success it will be important to monitor a community's ability to handle issues, to focus on the health and integrity of the gambling industry and the value of the experience to the state's visitors'.

Ideally, in order to conduct such research on the perceived social impacts of gaming (or any tourism development) is to do so several years prior to the development and several years thereafter (Perdue, Long & Kang, 1999), yet such long term impact research in Macao is limited to date (McCartney 2003b). Preliminary research has shown that Macao residents generally do not gamble in the local casinos (Vong & McCartney, 2004), although 'there was an indication that new casino



product and service concepts could fuel gambling participation, thus warranting the need for a longitudinal study to monitor how, in the long run, increased accessibility and improvement in casino product and service concepts could affect resident attitudes toward gambling' (ibid, 314). Of growing importance will be the need to examine problem gambling trends within the local community, although as yet no formalised public counselling service has been implemented.

Resident attitude and tolerance toward this influx of tourists will also be affected by perceived environmental costs. Already one of the most densely populated areas in the world, at 16,000 inhabitants per sq. km (Jones Lang LaSalle, 2004) and with the large casino complexes and supporting infrastructures already underway, issues such as rising noise and water pollution, littering, traffic jams, and natural environment destruction will become important issues. Of particular importance is heritage and cultural conservation, with a history in Macao dating back over 450 years when Macao first came under Portuguese administration in the mid 16th Century. With its unique blend of customs and heritage, the issue of conservation assumes further significance in light of the proposed listing pending with UNESCO to designate Macao a World Heritage City (Engelhart, 2002), with the protection issue a reason behind the building of the new mega-resorts and complexes on reclaimed land and certain outer parts of Macao. It is with this that apparent conflict seems to appear between the transportable 'manufactured' experiences offered by the casino industry and at the other end of the spectrum the 'authentic' experience by those exploring heritage and culture. As discussed by Smith & Hinch (1996: 44) 'while mountain or coastal scenery may make an attractive backdrop for casinos, from a purely functional perspective it can be argued that a casino is a built facility that is not dependent on any specific natural or cultural resource. Once patrons are participating in the games of chance, the backdrop becomes largely irrelevant'.

Due to Macao's historical and cultural background, it has been suggested to use Chinese and Portuguese themed casinos as marketing and promotional spin in order to distinguish itself from Las Vegas and other gaming destinations (Gu, 2004). However, using the historical backdrop of a destination for tourism development as warned by Teo & Huang (1995) may just be a form of 'museumization' which construct idealised pasts, more 'a historic ambience for tourist enjoyment than for representing a true picture of the past' (ibid, 594), and therefore may not be an effective strategy for heritage conservation. The Macao government authorities have called for the strengthening of the coordination among the various tourism stakeholders in evolving strategies to help ensure the conservation of Macao's varied past (McCartney & Nadkarni, 2003). 'That failing, an overemphasis on the development of the gaming sector would result in heritage and conservation issues being relegated to the backburner. Once the proverbial Rubicon is crossed, no amount of resources allocated by a cash-rich government will arrest the gradual or even rapid fading into oblivion of centuries of culture, thereby leading to an unfortunate paradox wherein the hand that fed was also the hand that killed' (ibid).



These impacts will obviously translate into the social exchange between Macao residents and the increasing tourism arrivals, and the degree to which social carrying capacity thresholds are being reached, particular in this milestone in Macao's casino development. Repeat visitation to Macao by tourists can only be achieved in the long-term by positive word of mouth descriptions from having high quality visitor experience at the destination. Such receptiveness will only be attained by resident's continued support to the gaming development, and on seeing that there is no long term negative impacts on their quality of life testified by minimising social and environmental impacts, and the conservation of Macao's unique heritage and cultural background. What is apparent is that as the tourism and gaming industries continue to expand in the coming years, there will be a greater need for Macao casinos to expand beyond taxation contributions and employment opportunities in their efforts to influence local resident attitudes.

Discussion

Casinos are becoming mainstream. In the west, jurisdictions without the gaming industry are very much the exception, and in Asia the floodgates of governmental investigation, discussion and debate will only hold for so long. Gaming in Macao has been present since its outset in the mid-17th century and was legalised as a tool for economic stimulus in the 1840s. As such, it has had a much longer period of social conditioning for local residents and in establishing itself as a leading gaming destination within Asia. With over a billion people residing within a two-hour flight of Macao and three fifths of the world within a five-hour flight (Jones Lang LaSalle Hotels, 2003), this represents a large potential tourism source market for Macao (with China its leading tourism market), particularly for the new casino developments. However, China has also continued to open its outbound tourism market beyond that of initially Macao and Hong Kong, with such policies as Approved Destination Status (ADS) permitting Chinese residents to travel to a growing number of selected countries for personal and leisure reasons (Pan & Law, 2004) including several regional destinations such as Japan, South Korea, Thailand, Malaysia and Singapore, and therefore a future tourism development consideration could be on the package of tourism products on offer. Some years before casino liberalisation, Hobson (1995) reported that having Macao's tourism industry based on being the only gambling centre was maybe not a safe bet, and for the future development of its tourism industry would need to 'develop the other attributes it has. Only in this way can Macao realistically achieve a better balance of markets for the long-term development of its tourism industry' (ibid 243). Stansfield (1996) also highlights the need for casinos to develop more spectacular and comprehensive entertainment packages using the example of the diffusion of legalised gaming in the USA and the eventual loss of the comparative advantages held by casinos in 'restricted legal locations'.

Gu (2004: 95) mentions that Macao should 'concentrate on developing high-profitability gaming



and let Hong Kong handle visitors' needs for non-gaming tourism activities', purporting that such a strategy can help in avoiding competition with Hong Kong, and generate more from its gaming industry. However, such a strategy would not take into account the rationale behind the liberalisation of Macao's casino industry, nor that this development is within a vibrant social community with rich cultural heritage. Macao has in addition invested large amounts of resources into sport tourism in order to move away from this entrenched image of solely being a gaming destination (McCartney, 2004) and will for example host three major multi-sports events in the next three years. The liberalisation also signalled the wish to create newer tourism segments such as the business and meeting markets, the challenge being to casino concession holders such as The Venetian, Macau, who plan to build convention facilities, on how to tap a market that is not significant and relatively untested at present.

The opening of Macao's casino industry represents a strategic point in its tourism life cycle in order to expand beyond gaming as the main tourism attraction product. While Macao looks now to address its tourism redevelopment challenges, several of its regional neighbours will undoubtedly be keen to learn the lessons from Macao on market repositioning and on the approach used to effectively handle the economic and social impacts of gaming development. With the potential of casinos now joining other tourism product offerings in destinations in the region, each destination will look for competitive advantages to gain part of this gaming tourism pie. The emergence of low cost airlines in the region, lowering the costs of transportation (and better accessibility), as well as government incentives such as lower gaming taxes (to encourage casino operators to offer more) are examples which could perhaps help to provide the competitive edge.

The high costs to enter the casino industry can be seen by casino regulators as a means of establishing long-term commitments and thereby ensuring a more stable casino industry (Braunlich, 1996). The three winners of Macao's casino concession (which immediately went to four upon the tenders being awarded) have committed large capital investments and resources to the redevelopment of Macao's gaming and tourism industry. Recently SJM and MGM have also secured a joint venture (Ponte Final, 2004), enlarging the number of world-renowned casino operators now developing in Macao.

The liberalisation process has presented Macao with a strategic milestone in its tourism development cycle, with several destination planning and management challenges emerging as a result. How Macao now repositions itself will have implications on how tourism will develop in the coming years and the destination image that will be portrayed internationally, requiring equal and equitable collaboration and corporation with all of Macao's gaming and tourism stakeholders in reaching the initial objectives behind the liberalisation process.



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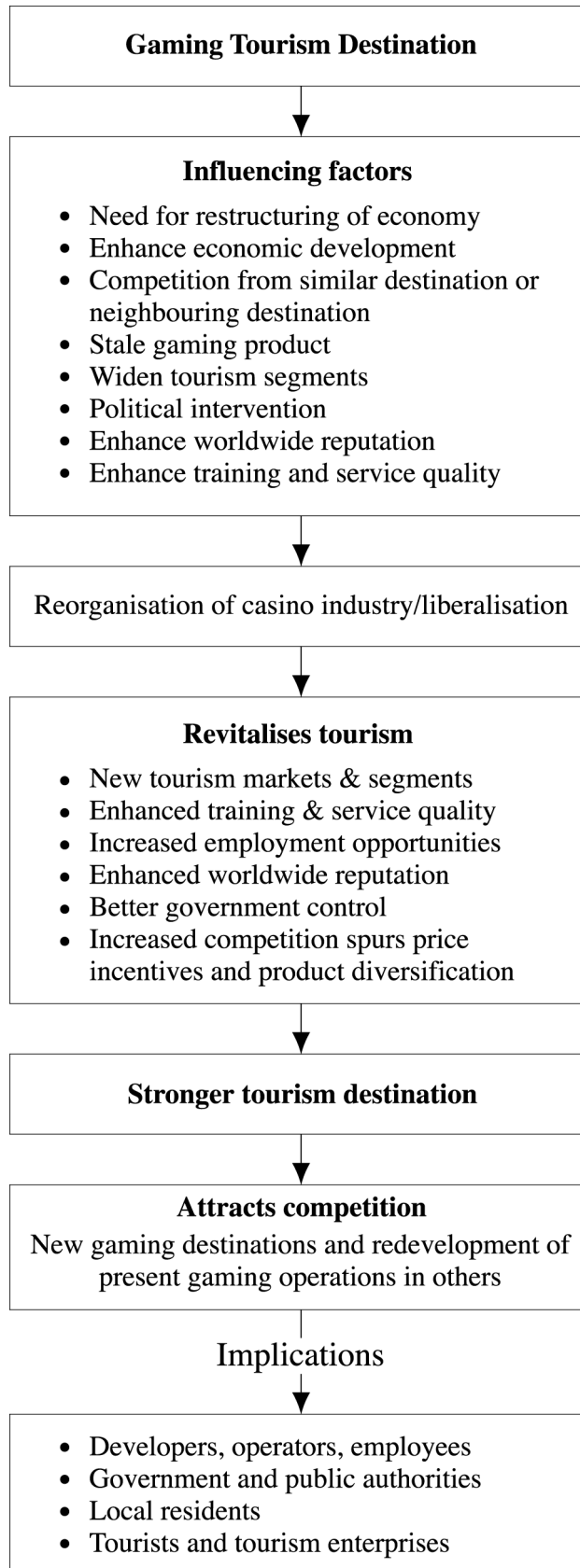
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Appendix 1: Gaming Liberalisation Destination Development Model



Appendix 2: Non-Gaming Destination Development Model

