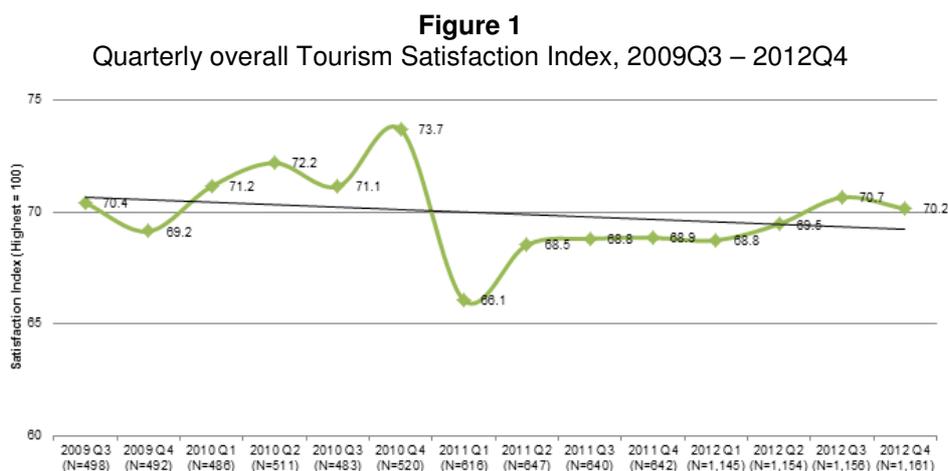


**IFT Tourism Research Centre (ITRC) announces full year
Macao Tourist Satisfaction Index (MTSI) result for 2012
“Visitor satisfaction with Macao slightly better than 2011
but no signs yet of sustained improvement”**

IFT Tourism Research Centre (ITRC) is releasing Q4 2012 quarterly and 2012 annual results of the Macao Tourist Satisfaction Index (MTSI). ITRC has been collecting quarterly data on visitor satisfaction in Macao since 2009 and its database now spans results covering more than three years. Reports can be downloaded from the ITRC website: <http://www.ift.edu.mo/itrc>. Highlights of the latest findings are as follows:

Visitor satisfaction barely above the ‘psychological passing mark’ as at Q4 2012

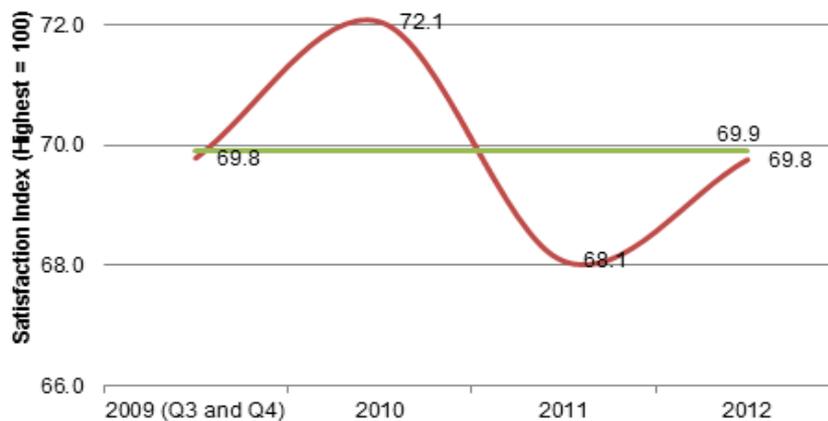
ITRC’s latest analysis of the Tourist Satisfaction Index (TSI) for Macao shows visitor satisfaction during the last quarter of 2012 was 70.2 out of the maximum 100 of the scale. Although this performance is slightly lower than the 70.7 recorded in third quarter of 2012, the index remains around the ‘psychological passing mark’ of 70, above which previous highs of the TSI were recorded during 2009 and 2010. The overall long-term trend for overall visitor satisfaction, however, continues to show a slight downward trend. Nevertheless, the TSI has been steadily improving since 2011. See Figure 1.



Full year MTSI improved in 2012

A total of 4,616 respondents were interviewed throughout 2012 across ten tourism-related sectors in Macao. The full year MTSI score for 2012 is 69.8, which shows a slight improvement of 1.7 points compared with the 68.1 full year result of 2011. Only the year of 2010 was found to perform exceptionally well and the TSI of that year peaked at 72.1. Looking at the long-term performance of Macao's tourism industry, the TSI of 2012 is marginally below the four-year average of 69.9 covering the period of 2009 to 2012. See Figure 2.

Figure 2
Annual MTSI from 2009 to 2012



Visitors are most satisfied with services provided by the events sector, followed by transportation and hotels in 2012; performance of the heritage sector deteriorates remarkably

Results for 2012 show the events sector (73.7) to be improving steadily and consistently outperforming other sectors. Transportation (72.3) and hotels (71.0) are ranked the second and third. Though improvements are found in restaurants (68.1), tour guides/operators (67.2) and immigration service (66.9), they continue to lag behind the other sectors.

It is encouraging that nine out of ten sectors showed improvement in visitor satisfaction in 2012 compared to 2011. Transportation (\uparrow 5.33%, 72.3), retail shops (\uparrow 4.77%, 69.7) and immigration service (\uparrow 4.03%, 66.9) score significantly higher in 2012. On the other hand, substantial decline in satisfaction in the heritage attractions (\downarrow 3.21%, 69.0) is recorded, which pulled down its ranking from the second in 2011 to the seventh in 2012. See Figure 3.

Comparing Macao's TSI with other destinations

Because ITRC conducts the TSI research in conjunction with regional partners in Hong Kong, Shenzhen, Guangzhou and Zhuhai in Mainland China, we are able to compare Macao's performance relative to those destinations. The comparison of TSI across different destinations allows us to determine the relative competitiveness and performance of Macao. The results for 2012 shows Hong Kong TSI to have the highest TSI score (75.1), followed by Guangzhou (73.1), and Macao (69.8) at the third place. See Figure 4.

Figure 3
Sectoral full-year TSI comparison, 2011 versus 2012

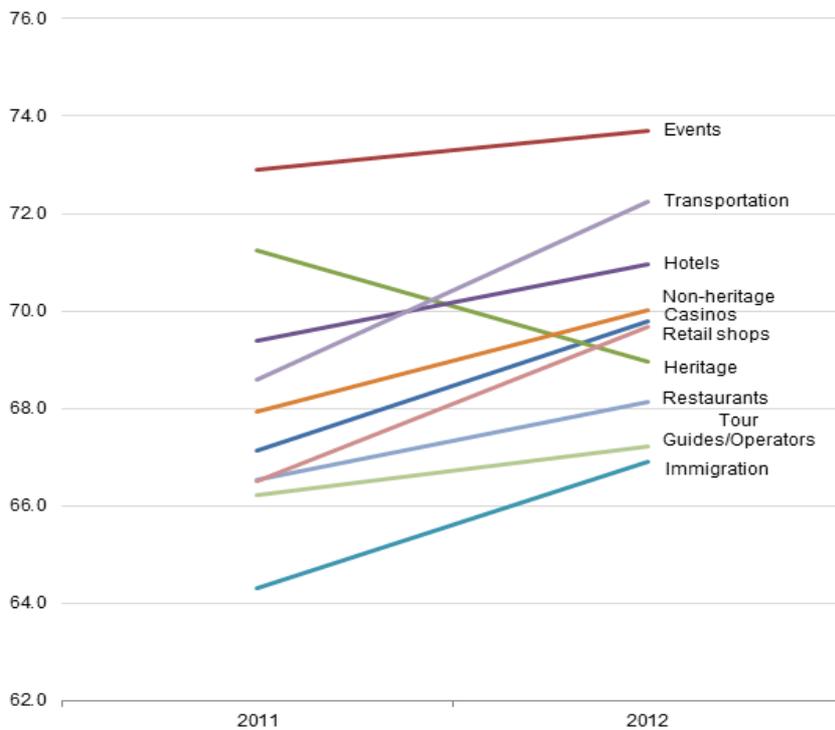
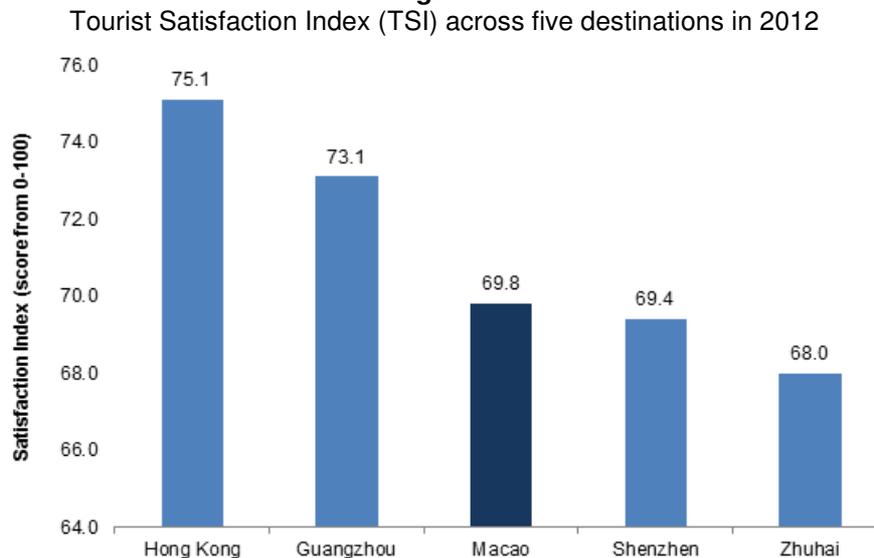


Figure 4



About the MTSI

Every quarter since 2009, ITRC has been measuring the level of visitor satisfaction in Macao across various sectors. Results across all sectors are averaged to form an overall Macao Tourist Satisfaction Index (MTSI). The ten tourism-related sectors in the TSI include (a) casinos, (b) events, (c) heritage attractions, (d) hotels, (e) immigration services, (f) non-heritage attractions, (g) restaurants, (h) retail shops, (i) tour guides/ operators, and (j) transportation services. With similar studies conducted by partners in other countries, results obtained in Macao are compared, when available, with those obtained in Hong Kong, Singapore, Shenzhen, and other destinations for comparing performance and competitive benchmarking.

Methodology

The MTSI is measured using a field survey in which respondents are selected and interviewed based on a systematic random sampling technique. Interviews with visitors are conducted at major tourist sites and transport terminals in Macao. Around 1,150 interviews are conducted quarterly. The TSI is an index comprised of the responses to three major questions: overall satisfaction, performance compared with expectations and with ideal performance given TSI model estimates. Results are transformed and reported on a scale ranging from 0- to 100-points. The higher is the score on the index, the higher is the level of satisfaction. The overall TSI is the average of all ten sectoral TSIs.



For more information

Please contact Ms. Virginia Hong or Ms. Wendy Tang (itrc@ift.edu.mo).

Public Relations
Institute for Tourism Studies
1 July 2013

1396/030REL/RP/13