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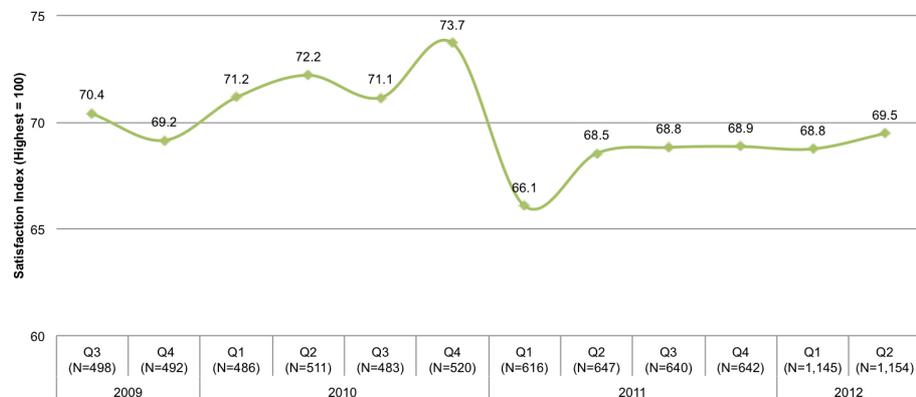
Latest results of the Macao Tourism Satisfaction Index (MTSI) conducted by the IFT Tourism Research Centre (ITRC) announced

IFT's Tourism Research Centre (ITRC) is releasing today the latest results of the Macao Tourism Satisfaction Index or MTSI, covering the first two quarters (first half) of 2012. Reports can be downloaded from the ITRC website: <http://www.ift.edu.mo/itrc/TSI.html>. Subscribers will be emailed copies of the reports directly. ITRC has been collecting data on visitor satisfaction in Macao since 2009 and its database now span quarterly results for the last three years. Highlights of the latest findings are as follows:

Visitor satisfaction in Macao—not worsening but not improving either

As of the end of the 2nd quarter of 2012, the Tourism Satisfaction Index (TSI) for Macao stood at 69.5 out of a highest score of 100. This is slightly better than the 68.8 recorded in the 1st quarter of 2012 and not at all significantly different from satisfaction recorded in the last three quarters of 2011. In other words, visitors' satisfaction with their experience in Macao has neither worsened nor improved for already a sustained period of time. The current and recent levels of the MTSI, though stable, stand below the above-70 index scores achieved for the most part of 2010.

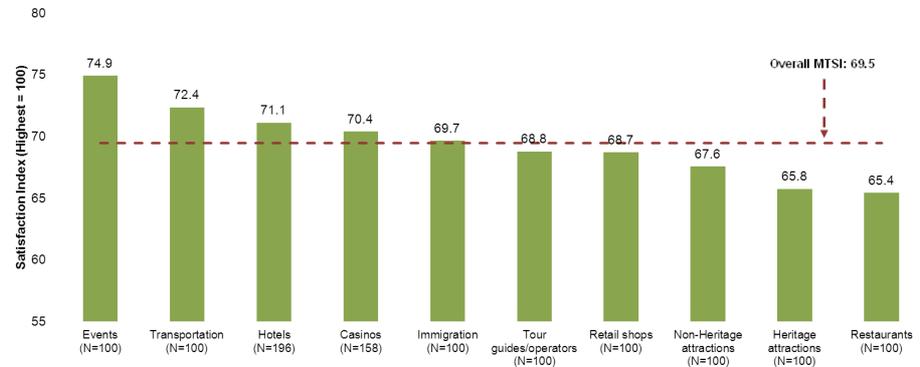
Figure 1
Quarterly MTSI levels



Events and transport keep up the good work; heritage attractions post lower than average satisfaction for the first time

For the 2nd quarter of 2012, overall MTSI performance was boosted by above-average satisfaction reported in the events, transportation, hotels and casino sectors, but favourable performance in these sectors were offset by below-average satisfaction reported in restaurants, heritage attractions, non-heritage attractions as well as by retail shops. Results for heritage attractions show unusually lower than historically average performance and therefore merit closer attention.

Figure 2
MTSI levels for various sectors, 2nd quarter 2012



Events are Macao’s real attraction, a surprising turnaround in transport sector; restaurants, retailing and non-heritage attractions need re-thinking

Looking at the sustained performance of all sectors over the last three years, Macao’s events sector remains the most positive performer, with visitor satisfaction for this sector being sustained above average. The restaurant sector remains the laggard; visitors’ satisfaction continues to be below average compared to all sectors. There seems to be a sustained turnaround for the transportation sector, with satisfaction ratings improving from Q4 2011 up to the most recent quarter. Compared to the first half of 2011, the first half of 2012 shows slight, but not significantly better, results. Efforts need to be maintained and strengthened so that the second half of 2012 would result in overall better results for the year compared to 2011.

Figure 3
MTSI levels for various sectors, Q3 2009 to Q2 2012

	2009		2010				2011				2012	
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Casinos	67.9	66.4	73.0	73.9	70.3	75.2	67.0	66.4	69.1	66.1	68.0	70.4
Events	75.6	69.8	72.0	75.1	77.2	77.5	69.5	75.4	72.1	74.5	69.6	74.9
Heritage	77.5	71.4	73.0	76.2	78.3	76.8	73.3	71.3	68.9	71.5	70.6	65.8
Hotel	67.1	66.3	63.8	65.3	68.0	77.3	67.7	68.1	71.5	70.4	68.5	71.1
Immigration	67.7	71.4	68.9	72.5	67.0	70.2	58.9	69.4	60.6	68.2	68.9	69.7
Non-heritage	68.8	68.6	78.7	72.8	73.6	75.7	69.9	64.8	71.0	66.0	68.9	67.6
Restaurants	64.7	65.1	68.6	69.7	66.3	68.9	65.0	65.1	68.9	67.2	64.9	65.4
Retail shops	75.8	73.8	68.2	72.8	70.9	70.9	61.9	69.5	70.4	64.1	68.8	68.7
Tour Guides/Operators	71.1	71.5	69.2	73.0	71.3	71.4	63.8	63.4	67.9	69.8	65.4	68.8
Transportation	68.0	67.2	76.2	70.5	68.5	73.2	63.9	72.0	67.8	70.8	73.9	72.4
Average	70.4	69.2	71.2	72.2	71.1	73.7	66.1	68.5	68.8	68.9	68.8	69.5

■ Poor performance ■ Good performance

About the MTSI

Each quarter since 2009, ITRC has been measuring the level of visitor satisfaction in Macao across various sectors in the tourism industry. Results across all sectors are averaged to form an overall Macao Tourist Satisfaction Index (MTSI). The ten tourism related sectors 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.

The MTSI study is conducted by ITRC in collaboration with the Hong Kong Polytechnic University School of Tourism and Hotel Management. With similar studies conducted by partners in other countries, results obtained in Macao by ITRC are compared annually with those in Hong Kong, Singapore and Shenzhen, thereby allowing comparison in terms of competitive performance and 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. In the first and second quarters of 2012, 1,145 and 1,154 interviews were conducted respectively. The TSI is an index comprised of the average responses to three questions asked in the survey for all sectors: overall satisfaction, performance compared with expectations and with ideal performance. Results for each sector are transformed and reported on a scale ranging from 0 to 100 points. The higher the score on the index, the higher the level of satisfaction. The overall TSI is the average of all ten sectoral TSIs.

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