

Friday, 21 February 2014

## **ITRC announces full year Macao Tourist Satisfaction Index (MTSI) result for 2013**

Highlights

### **Visitor satisfaction slightly improved as at Q4 2013**

1. IFT Tourism Research Centre (ITRC) is today announcing 4<sup>th</sup> quarter as well as full year results for 2013 of the Macao Tourist Satisfaction Index (MTSI). ITRC has been tracking quarterly data on visitor satisfaction in Macao since 2009 and has now accumulated almost 5 years of quarterly visitor satisfaction under the MTSI project, making this initiative the longest and most sustained quarterly tracking study of visitor satisfaction of Macao's tourism and hospitality sectors.
2. The latest results show overall visitor satisfaction during the fourth quarter of 2013 at 70.4 out of the maximum 100 of the scale. This performance is 1.0 index point higher compared with the last quarter and by 0.2 points year-on-year. It is also slightly above the long-term average score of 70.0. See Figure 1.
3. Q4 2013 results are based on survey interviews conducted with 1,213 randomly selected visitors between October to December 2013. Interviewees evaluated their satisfaction and experience with ten tourism-related sectors in Macao.
4. The service performance of most sectors improved in Q4 2013. Respondents' satisfaction with events reached a record high in Q4 2013 (↑ 5.00%, 77.9). The events sector continues to outperform other sectors and has ranked highest in visitor satisfaction for 7 quarters since Q2 2012.
5. Tour guides and tour operators as a whole improved considerably in Q4 relative to Q3 (↑ 6.22%, to 65.7) but continues to generally lag behind all other sectors Q3 and Q4 2013. The significant improvement in satisfaction for tour guides and tour operators could be attributable in part to the new law enacted on 1<sup>st</sup> October 2013 banning zero-cost tours in Mainland China.
6. Other sectors exhibiting improved satisfaction ratings in Q4 2013, included restaurants, casinos, retail shops, hotels and local transportation. On the other hand, significant deterioration in performance was found in immigration service (↓ 7.43%, 67.3). Table 1 shows the quarterly performance of the ten service sectors for 2013. Figure 2 shows the relative performance of each sector across the entire time series.

### **Full year MTSI improved in 2013**

7. A total of 5,021 respondents were interviewed throughout 2013 with surveys covering the ten tourism-related sectors. The full year MTSI score slightly improved 0.5 index point in 2013, to 70.3, which is the second highest since

2009. The highest annual TSI for all sectors was 72.1, recorded in 2010. See Table 2.

8. Based on all data collected thus far, the long-term outlook for the MTSI is that it will remain at or around present levels (see blue dotted line in Figure 1). However, looking at more recently collected data (from 2011 to present) the MTSI has been showing significant improvement, albeit in small but sustained increments (see black dashed line in Figure 1).
9. Looking at the long-term performance of each sector, moderate but sustained improvement in visitor satisfaction can be attributed to the events, casinos, restaurants, as well as hotel sectors. On the other hand, declining TSIs over the last 4.5 years can be seen in the retail shops, tour guides operators, and heritage sectors. (see Table 2).
10. The full quarterly reports are available for downloading at ITRC's webpage: <http://www.ift.edu.mo/EN/MTSI/Home/Index/741>

### **About the MTSI**

The ten tourism service sectors tracked by 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. 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 the score on the index, the higher the level of satisfaction. The overall MTSI is the average of all ten sector TSIs.

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ITRC is a unit of the Institute for Tourism Studies, Macao.

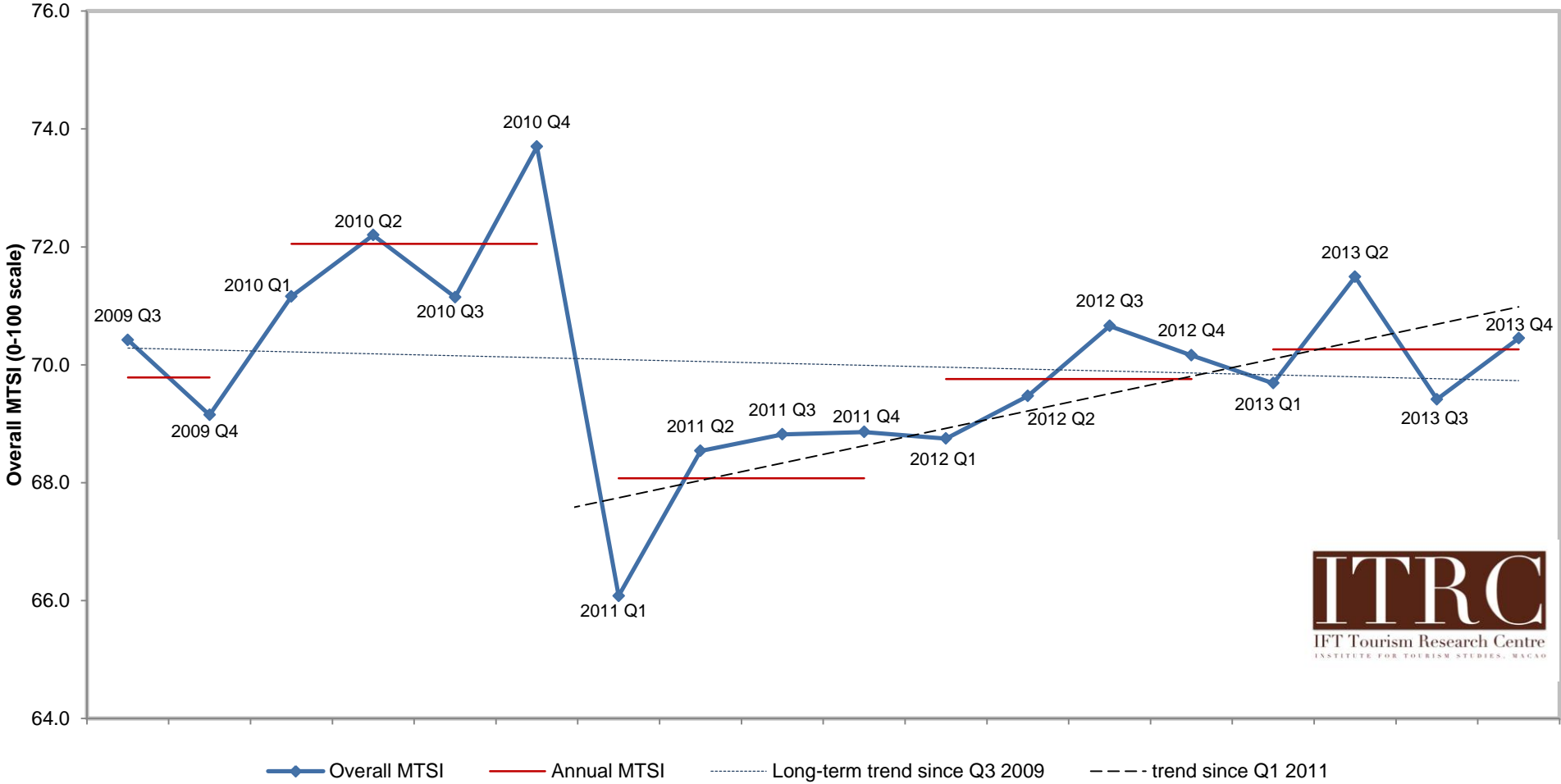
**Table 1**  
Sector Tourist Satisfaction Index and ranking, Q1-Q4 2013

Sectors	2013				Ranking as at Q4 2013	Quarterly rank change
	Q1	Q2	Q3	Q4		
Casinos	70.4	73.0	70.0	72.5	3	▲ 1
Events	77.5	75.7	74.2	77.9	1	▬ 0
Heritage	68.5	68.3	69.8	68.0	8	▼ 3
Hotel	71.3	73.9	68.5	70.2	4	▲ 3
Immigration	65.3	70.2	72.7	67.3	9	▼ 6
Non-heritage	69.3	72.3	69.3	68.8	7	▼ 1
Restaurants	65.1	69.5	66.7	69.3	6	▲ 3
Retail shops	71.3	71.5	67.8	69.9	5	▲ 3
Tour Guides/Operators	69.6	68.8	61.9	65.7	10	▬ 0
Transportation	68.6	71.8	73.3	75.0	2	▬ 0
<b>Overall MTSI</b>	<b>69.7</b>	<b>71.5</b>	<b>69.4</b>	<b>70.4</b>	-	-

**Table 2**  
Annual Sector Tourist Satisfaction Index, 2009-2013

Sectors	2009	2010	2011	2012	2013	
Casinos	67.1	73.1	67.1	69.8	71.5	
Events	72.7	75.5	72.9	73.7	76.3	
Heritage	74.4	76.0	71.2	69.0	68.6	
Hotels	66.7	68.6	69.4	71.0	71.0	
Immigration	69.6	69.6	64.3	66.9	68.9	
Non-heritage	68.7	75.2	67.9	70.0	69.9	
Restaurants	64.9	68.4	66.5	68.1	67.7	
Retail shops	74.8	70.7	66.5	69.7	70.1	
Tour Guides/Operators	71.3	71.2	66.2	67.2	66.5	
Transportation	67.6	72.1	68.6	72.3	72.2	
<b>Overall MTSI</b>	<b>69.8</b>	<b>72.0</b>	<b>68.1</b>	<b>69.8</b>	<b>70.3</b>	

**Figure 1**  
 Macao Tourist Satisfaction Index (Q3 2009 to Q4 2013)



**Figure 2**  
Sector TSI levels over time compared to Overall MTSI

