

Thursday, 24 October 2013

ITRC announces the latest findings of the Macao Tourist Satisfaction Index (MTSI)

Highlights

1. ITRC has now accumulated 4 years worth of visitor satisfaction data (or across a time span of 17 quarters) in the MTSI project, making it not only the first of its kind but also the most sustained quarterly tracking study of visitor satisfaction in Macao.
2. Latest results show overall visitor satisfaction during the third quarter of 2013 at 69.4 out of the maximum 100 of the scale. This performance is lower by 2.1 index points compared with the second quarter and by 1.2 points year-on-year. It is also slightly below the long-term average score of 70.0 as at Q3 2013 (though this difference is insignificant). See Figure 1 next page.
3. Current results are based on random survey interviews conducted with 1,222 visitors during the July to September 2013 period. Interviewees evaluated their satisfaction and experience with ten tourism-related sectors in Macao.
4. The long-term outlook for the MTSI is that it will remain at present levels. Visitor satisfaction is not expected to improve nor deteriorate, considering past data. (See black dashed line in Figure 1.) There were, however, periods over the last 4 years in which visitor satisfaction were significantly lower than average. For example, most quarters during 2011 registered significantly lower than average (note red line in Figure 1). The last 6 quarters, however, showed significantly improved MTSI scores compared to 2011 (note green line in Figure1), though still below satisfaction levels registered during the first 6 quarters of the 2009-10 period.
5. These results indicate that while there have been sustained overall improvements in Macao's tourism products and services in the last four years, there have also been consistent deterioration that, altogether, neutralizes any progress made. We urge the tourism and hospitality sector, policy makers and industry stakeholders to identify, pinpoint and address the underlying factors that inhibit the long-term and sustained delivery of positive and favorable visitor experience.
6. In terms of the different service sectors, the latest quarterly performance shows low TSI scores (61.9) for tour guides/operators to high scores (74.2) for events. The events sector has, over time, outperformed other service sectors and ranked as most satisfied for 6 quarters since Q2 2012. Improved TSIs in the latest quarter can be seen in transportation (↑ 2.13%, 73.3) and immigration service (↑ 3.46%, 72.7). Table 1 shows the quarterly performance of the 10 service sectors for 2013. Figure 2 shows the relative performance of each sector across the entire time series.
7. The full quarterly reports are available for downloading at ITRC's webpage: <http://www.ift.edu.mo/EN/MTSI/Home/Index/741>

Table 1
Sector Tourist Satisfaction Index and ranking, Q1-Q3 2013

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

About the 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. 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 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).

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

Figure 1

Macao Tourist Satisfaction Index (Q3 2009 to Q3 2013)

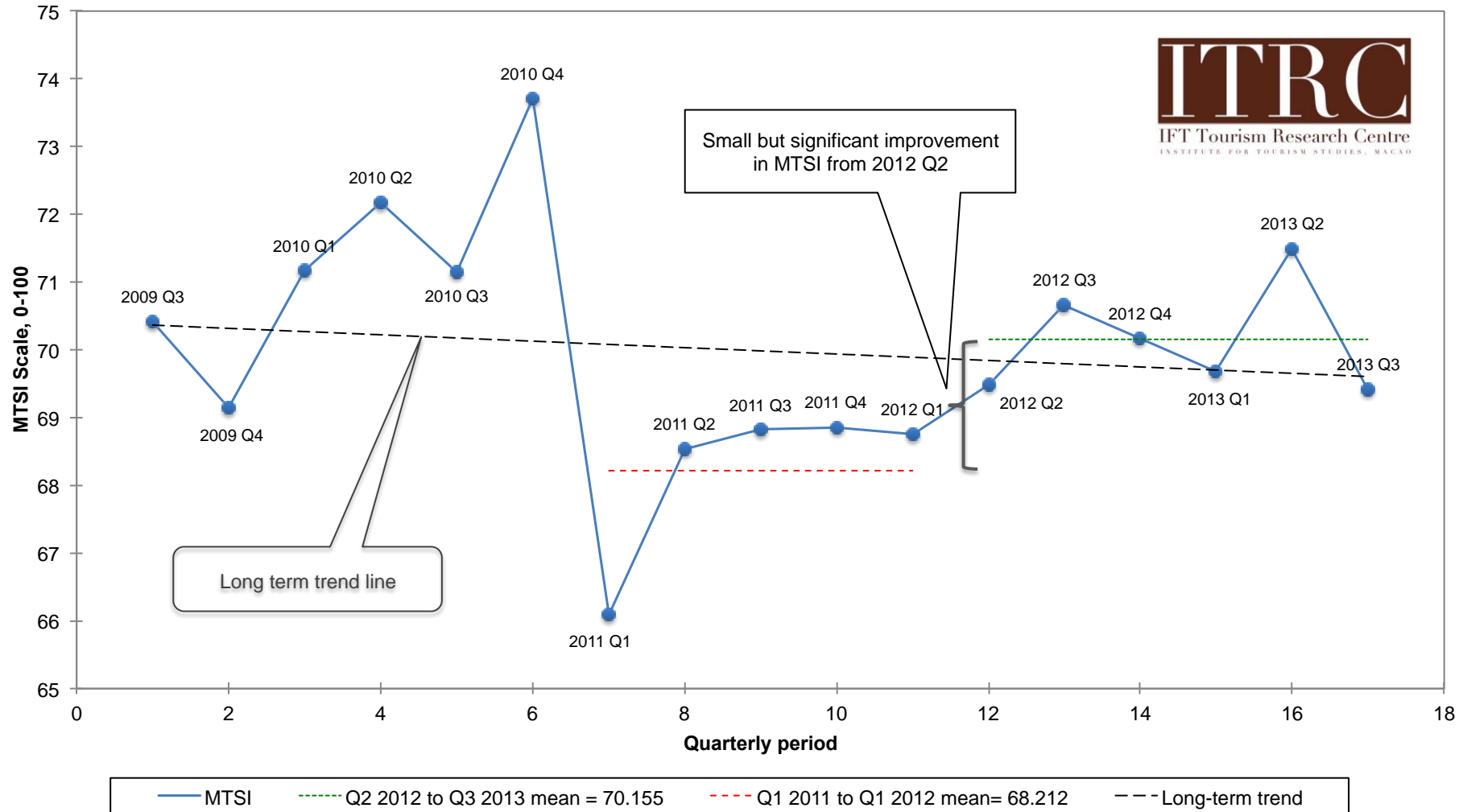


Figure 2
Sectoral TSI levels over time compared to Overall MTSI

