

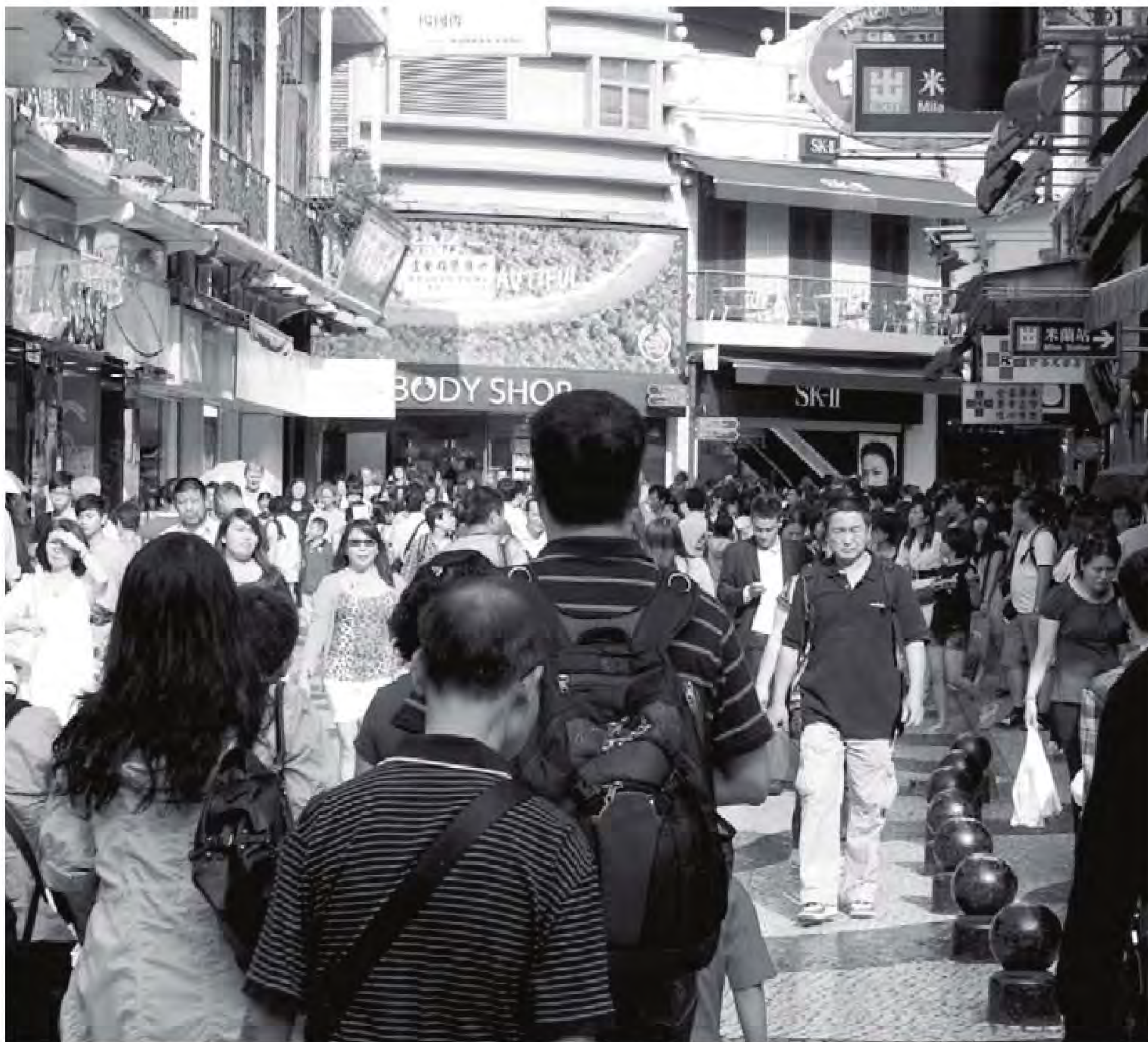
Visitor satisfaction declining:

by Alexandra Lages

Visitors have high expectations when they arrive in Macau, but service performance is still low. In addition, Macau is still perceived as a low value destination, mainly for Mainland Chinese tourists, and that's another cause contributing to declining visitor satisfaction this year, the latest report on Macau Tourist Satisfaction Index (MTSI) shows.

The research report conducted by the International Tourism Research Centre (ITRC) of the Institute for Tourism Studies (IFT) was released on Friday. Major findings of the MTSI say that compared to the first half of 2010, the current trend for overall visitor satisfaction in Macau is declining.

"Looking at only the most recent data, almost all sector performances in the first half of 2011 have not been as good compared to the whole of 2010," the report says.



Hotels, immigration and restaurants were the sectors with below average performance. "The long term trend for hotels seems to be improving, restaurants are stable, but immigration shows a tendency to be declining over the long term," it was said.

"The restaurant related issue is that respondents don't want to wait for a long time for food and expect reasonable prices," Anthony Wong, IFT's professor told reporters at a press conference.

Sectors with average performance were casinos, retail shops, tour guides/operators, and transportation.

The IFT's report points out that the trend for casinos and transportation is stable, since they are somehow able to maintain an average level of satisfaction.

However, it alerts retail shops and tour guide operators to the fact that their long-term trend is negative, showing a "declining trend for retail shops and tour guide/operators."

Several disputes between

MICE tourists stay longer

The Macau tourism industry needs to focus more on the Meetings, Incentives, Conventions and Exhibitions industry (MICE) business and heritage visitors to increase the length of stays of tourists the latest Macau Visitor Profile Study (VPS) suggests.

On Friday, the Institute for Tourism Studies (IFT) launched the report that revealed that the average length of stay for visitors that arrive for the purpose of visit and those for business is 3.1 days and 2.4 days respectively, while the percentages of staying for over one day in these cases hit 81 and 72 percent.

On the other hand, first-time visitors stay on average 2.6 days (79 percent stay over one day); and southeast Asian visitors average 3.3 days stay (89 percent stay over 1 day). Visitors with the shortest length of stay are pleasure visitors (average 2.0 days); repeat visitors (2.1 days) and those from Hong Kong (1.7 days).

Shopping and food/cuisine are the main activities for those Macau. Other tourism

activities include attending MICE and business, visiting world heritage sites as well as shows, concerts and special events.

"The trend shows that the former [group] has an increase interest to attend the MICE business while the latter has an interest to visit world heritage attractions. It would be beneficial to put more effort in promoting the MICE business and world heritage activities [in order to] meet their interest accordingly", it suggests.

The report notes that visitors from Taiwan and other Southeast Asian regions are those that stay longer but also among those who appear to be unlikely to revisit Macau. As for overall visitors, the VPS notes there is a potential to diversify the tourism activities by increasing the effort to promote shows and concerts because of the existing steady growth in the year-on-year trend, especially among visitors from mainland China, Hong Kong and Taiwan.

"Since those with the primary purpose of visiting attractions seems unlikely to revisit Macau, the government, industry and



relevant agencies should work together to develop more attractions so as to retain this market," it adds.

The duration of stay has been a struggle for the Macau Government Tourist Office (MGTO) for a long time. However, the average length of stay has never managed to exceed the one-day limit.

Another Macau Visitor Profile Study conducted by the Faculty of Business Administration at the University of Macau (UM) released in August also recommends Macau to urge the government and tourism operators to improve in several areas. It says that the city is still lagging behind Las Vegas in fine dining and entertainment areas. A.L

macau daily 澳門每日時報
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AFP, Lusa, Project Syndicate, Xinhua.

A Macau Times Publications Ltd. Publication

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study

tourists and guides have been reported this year. It even forced Macau and mainland China to sign a pact to fight malpractice in the industry, including 'zero-fee tour packages' and 'forced shopping'.

In contrast, there are good news for events, heritage and non-heritage attractions, which have performed above average on the MTSI.

The latest findings covering the last eight quarters, from the third quarter of 2009 to the second quarter of 2011, show a decline of MTSI from 70.4 in 2009 to 68.5 in 2011 (with 100 being the highest score).

Tour guides or operators received the lowest score with 63.4 in the second quarter of this year, while restaurants scored 65.1 and retail shops 69.4. The best scores were given to events 75.4, while heritage rated 71.3.

Staff quality issues

The report warns that if Macau wants to build the city as a global centre of tourism and leisure, "there is an urgent concern to ensure that the different sectors making up the local tourism industry remain competitive and aware of their service performance levels in satisfying visitors".

However, they add, "it is becoming clear that some service sectors are more vulnerable or less capable in satisfying visitors over time". Thus, the IFT calls for interventions in terms of initial and ongoing training of front-line staff, enhancing quality of recruitment and reviewing the myriad and complex factors driving service performance of front line staff to be initiated by institutions relevant in each sector and conducted in collaboration

with relevant public agencies.

It also urges the government to review its labour policy. "The current policy seems to affect the small and medium firms like restaurants and retail shops most especially during public holidays because many of them would rather close their business during holidays due to high labour cost. Yet, these are usually peak periods with record high tourist arrivals.

"As a result, tourists, and residents to some extent, would flock to restaurants and stores that remain open during holidays. This creates a vicious cycle, which further deteriorates the service performance and the value of tourism offers," the report says.

However, Wong does not recommend importation of workers, suggesting Macau should look into training and education instead.

"We have already witnessed that tourism worker language skills are limited. However, despite this discrepancy, it might not be necessary to import foreign workers, but more training will be useful," he says.

The scholar continues: "Quality in terms of manpower is more important than quantity."

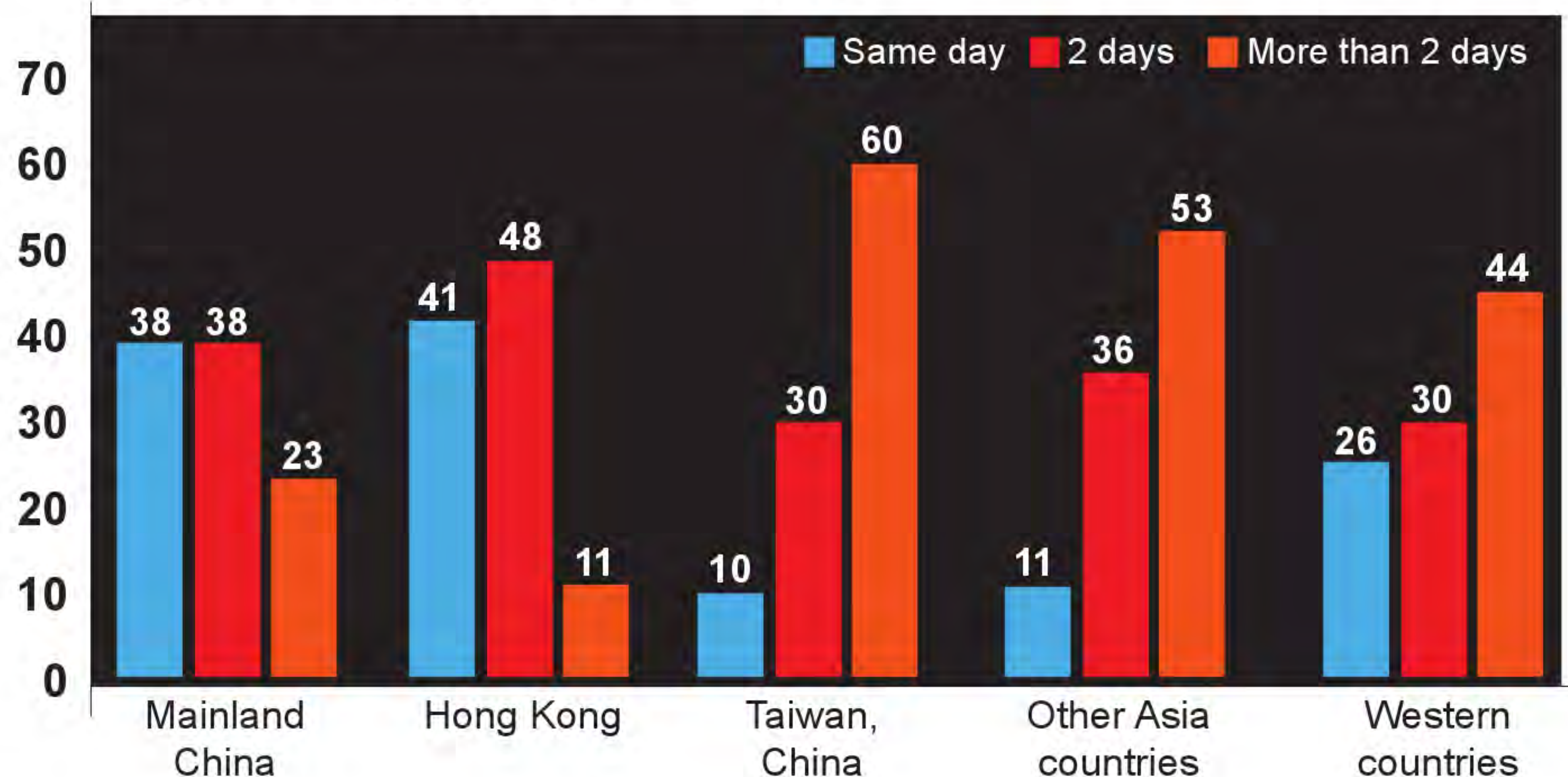
Interviews with visitors were conducted at major tourist sites and transport terminals. Altogether, 2001 interviews were conducted during the year of 2010 and 1264 interviews have been conducted in the first two quarters of the current year.

The International Tourism Research Centre of IFT has been measuring the level of tourist satisfaction in Macau across various sectors in the tourism industry each quarter since mid-2009.

Major Findings - Trip characteristics

- Visitors from Taiwan China and SE Asia visitors with 90% and 89% stay over 1 day respectively.
- Those from Hong Kong (the shortest stay at 41%) are same day visitors.

Length of stay by Source Market



Fanny Vong: 'Crowded, transportation capacity' are concerns

Macau is facing some issues of being too crowded, along with transportation and infrastructure issues, president of the Institute for Tourism Studies (IFT), Fanny Vong, said.

Commenting on the latest results of the report on the Macau Tourist Satisfaction Index, the educator argued that the sector not only needs to enhance staff training but also do more at the managerial level.

Recently, UNESCO warned that Macau was receiving too many tourists. Last year, Macau counted almost 25 million tourists, and yet forecasts from the Pacific Asia Travel Association (PATA) say that a new record might be set this year with 27 million visitors.

"I'm not aware of any universal rule of limiting tourist arrivals, except maybe in Bhutan," Vong told reporters.

"There are other things we



'Every year, around this period, you see people from the industry coming to take our training and occupational skills recognition system': Fanny Vong

can do at the managerial level to ease the crowd issue, such as to put more interpreters on site so that people can flow more smoothly through sites, and managing visitor flow by telling them there are other places worth visiting in Macau," she suggested.

Commenting on findings of the report that point to a decline in tourist satisfac-

tion levels, Vong admitted that "training is one of the reasons, but of course we are an education institution so we realise this is happening and we'll try to play our part. However, you have to be aware there are other issues like crowds, carrying and infrastructure capacity." The IFT will increase its capacity in degree and non-degree programmes, she remarked.

"Every year, around this period, you see people from the industry coming to take our training and occupational skills recognition system. This is standardised training for all front line and supervisory staff in hotels and in the tourism industry which covers over 10 occupational areas," she added.

"We will expand our partnership with overseas partners and our training capacity. In terms of quality, we have to ensure that our edu-

cators and trainers are here to provide the best training," she added.

To improve quality of tour guides, Vong proposed the government should continue regulating tour guides, launch more inspections, while "IFT is doing its best to hold refreshing training".

As for labour policies, she called on the industry to adopt a pre-training or pre-certification before accepting new arrivals on the job, to ensure when workers start they will not require too much extra time for on-the-job training. "They can perform at the same level as their counterparts as they arrive on the job. Right now training has to be speeded up for them to fit," she said.

Also on Friday, Robert Veen presented the 2011 Hong Kong Polytechnic University Tourist Satisfaction Index.

In Hong Kong, unlike Macau, visitors are reported to be generally satisfied with the service received during their visit.

Veen suggested that Macau improve training and education. "You can see that in Hong Kong they set service pledges, especially for immigration and other government services or even with transportation like the MTR. They have their own policies to ensure customer satisfaction. So, maybe other destinations can follow this," he said.A.L

Latest Results – Overall MTSI

