新聞稿　　**Nota de Imprensa　　News Release**

The Macao Tourist Satisfaction Index (MTSI)
Press Conference

Introducing the Macao Tourist Satisfaction Index (MTSI)

1. On the occasion of the 15th anniversary of the establishment of the Institute for Tourism Studies (IFT), the International Tourism Research Centre (ITRC) of IFT is pleased to announce the publication of the Macao Tourist Satisfaction Index, or MTSI. The MTSI measures the satisfaction of Macao visitors across 10 tourism related service sectors and integrates all these in an overall index.

2. The 10 tourism related sectors in Macao measured in the MTSI are (a) casinos, (b) events, (c) heritage attractions, (d) hotels, (e) immigration services (e.g. customs), (f) non-heritage attractions, (g) restaurants, (h) retail shops, (i) tour guides/operators, and (j) transportation services. The overall satisfaction index for the tourism industry in Macao is then estimated, via a statistical modeling process, based on the sector indices.

3. In essence, the TSI tracks, over time, how well tourism services and organisations in Macao perform in satisfying visitors. The Macao Tourist Satisfaction Index (MTSI) is conducted throughout the year with reports showing results of the overall index and for each of the 10 sectors published quarterly and annually. The general public can download copies of the quarterly and annual report from the ITRC website.

4. Objectives of the MTSI:
   (a) To monitor and inform the general public in Macao about the state of visitors' satisfaction with the different sectors comprising the tourism and hospitality industry in Macao.
   (b) To provide information that will be useful for management of various operating organisations in the hospitality and tourism industry as well as for tourism policy planners and decision makers.
   (c) To provide a means for determining factors relevant to influencing the level of visitors' satisfaction among the different sectors of the tourism industry, with the long term goal of making the industry more competitive, and to establish a regular assessment mechanism or "barometer" to gauge the influence of these factors.

Background, Short History of the MTSI and International Collaboration

5. With the MTSI, Macao joins a growing list of international tourism destinations that are adopting similar satisfaction indices in order to measure their service performance and competitiveness over time as well as to compare and benchmark performance with other tourism destinations. Besides Macao, destinations that are now developing tourism satisfaction indices include Singapore, the Shenzhen Special Economic Zone and Hong Kong, which was the first to introduce a tourism satisfaction index in 2009, the Hong Kong Poly TSI, and developed by the School of Hotel and Tourism Management of the Hong Kong Polytechnic University.

6. While satisfaction indices for different industries have been around for some time, developing and applying a satisfaction index specific for tourism destinations was pioneered and initiated in 2009 by Professor Haiyan Song of the School of Hotel and Tourism Management at the Hong Kong Polytechnic University, along with Dr. Robert Veen, and other members of Professor Song's team.

7. In Macao, IFT first began reporting on tourist satisfaction of Macao visitors in 2000 and 2001. In 2003, IFT continued to measure tourist satisfaction of Macao visitors through its annual Tourism Carrying Capacity Study—a Macao Government commissioned study—which incorporates measures similar to the present MTSI. Recognising the similarity of their efforts as well as the potential for synergy and comparative value of working together, ITRC-IFT and SHTM through Professor Song began formal collaborations on this project in 2009.

8. With a growing international network of tourism destinations adopting satisfaction indices, Macao will be able to determine its performance as well as strengths and weaknesses relative to other destinations, allowing it to be more competitive and identify strategic areas for improvement.

Methodology and Most Recent Results of the MTSI

9. Data collection began for the MTSI during the third quarter of 2009. For each sector, approximately 50 interviews are conducted per quarter, which is equivalent to about 200 interviews per year per sector. Respondents are selected and interviewed based on a systematic random sampling technique. Interviews are conducted at major sites and terminals in Macao.

10. Tourist satisfaction (TS) for each sector is measured with three indicators, namely: (1) confirmation of expectations, (2) comparison with the ideal and (3) overall satisfaction. Each indicator is measured by an 11-point scale ranging from 0 to 10. The weight of each sector satisfaction is estimated based on structural equation modeling with maximum likelihood estimator. The estimated weights are then used to construct

the sector TSI value which is transformed to a 0- to 100-point scale: The higher the index, the more satisfied the tourists for the corresponding sector. The Overall MTSI is an average of the ten sector TSIs.

11. Most recent data collected over a one year period from Q3 2009 to Q2 2010 indicate the following satisfaction levels for each of the 10 sectors in Macao as well as overall (with 100 being the highest score):

Sectors	2009 Q3 (Pilot)	2009 Q4 (Pilot)	2010 Q1	2010 Q2	Average
Heritage	77.5	71.4	73.0	76.2	74.5
Events	75.6	69.8	72.0	75.1	73.1
Retail shops	75.8	73.8	68.2	72.8	72.6
Non-heritage	68.8	68.6	78.7	72.8	72.2
Tour Guides/Operators	71.1	71.5	69.2	73.0	71.2
Transportation	68.0	67.2	76.2	70.5	70.5
Casinos	67.9	66.4	73.0	73.9	70.3
Immigration	67.7	71.4	68.9	72.5	70.1
Restaurants	64.7	65.1	68.6	69.7	67.0
Hotel	67.1	66.3	63.8	65.3	65.6
Total/Average	*70.4*	*69.2*	*71.2*	*72.2*	*70.7*

12. Results indicate that:
   - MTSI fluctuates over time and among sectors.
   - In regard to the four quarter overall MTSI, MTSI is the lowest in Q4 (peak season) while the index hits to its highest point in Q2 (low season). The findings seem to suggest an inverse relationship between tourist satisfaction and tourist inflow. The findings may also suggest a "bottleneck" effect in that tourist satisfaction would decline when Macao's tourism capacity reach a threshold.
     - o In comparison with TSI from other destinations, Macao's overall MTSI (average of four quarters = 70.75) is lower than the 72.65 recorded in Hong Kong in 2009.
   - In regard to sectoral (industry) TSI, tourists are less satisfied with the hotel and restaurant sectors (industries), while they are more satisfied with the heritage and event sectors.
     - o Based on the MTSI structural model, differences in the satisfaction scores of different sectors can be attributed to discrepancies between tourists' expectations and perceived performance as well as between the value they expect and the actual value they receive.
     - o The retailing sector is doing relatively good as the TSI is around 72.6 on average. It peaks in Q3 and drops to below 70 at the beginning of the year. This pattern of data is

possibly explained by the number of sales promotions offered by retailers at different periods of the year.

- o Another issue is that since tourist expectation influences their satisfaction level, the findings may also suggest that Macao may have portrayed an image of an ideal destination with attractive hotels and restaurants as it has been known as the Asian Las Vegas; however, when tourist perceptions fall below their expectations, tourist satisfaction drops. This is particularly serious during the peak season.
- Why is tourism satisfaction important? The findings indicate that satisfied tourists are more likely to return and less likely to complain to their friends and relative about their experience in Macao. Our other studies also reveal that repeat visitors do spend more money in Macao. These statistics suggest that satisfying tourists should be an important goal.

The Hong Kong PolyU TSI and Shenzhen TSI

13. The Hong Kong PolyU TSI framework has been applied to six large datasets representing different tourism-related service sectors in Hong Kong. A quota sampling method was employed to obtain a representative sample of inbound tourists from seven source markets. The questionnaire was available in English, Chinese, Korean and Japanese. The survey locations are the (i) Hong Kong International Airport, (ii) ferry terminals, (iii) hotels, and (iv) popular tourist attraction sites (Peak, Avenue of Stars, Ngong Ping 360 Cable Car). Data collection took place during the summer months and 2747 valid questionnaires were obtained for 2010.

Tourism sectors	2009	2010
Transportation	77.79	78.73
Attractions	74.26	75.57
Immigration	74.27	72.85
Hotels	71.67	70.52
Retail shops	69.44	68.66
Restaurants	68.85	66.61
Hong Kong PolyU TSI	**72.65**	**73.94**

The overall TSI is derived from an innovative aggregation scheme which is part of a two-stage Hong Kong PolyU TSI framework. This framework is able to synthesize the service performance metrics horizontally and vertically across tourism-related sectors in order to visualise their contribution to the performance of the destination as a whole. The results for 2010 are positive and well above average. Although, the majority of the service sectors indicate slightly lower index scores, the Hong Kong PolyU TSI for 2010 still managed to climb up to 73.94 index points out of 100. The increase is mainly due to the elevated index scores of the

attractions and transportation sectors.

14. Similar encouraging results are found for the Shenzhen TSI for 2010. The survey data was collected at (i) popular tourist sites (Happy Valley, Windows of the World, Splendid China etc.), (ii) ferry terminals, (iii) hotels, (iv) checking points and (v) transport interchanges. Data collection took place during the summer months and 4351 valid questionnaires were obtained covering six sectors across nine source markets to fulfill the study's objectives. All TSIs are positive and exceeding the mid points. The attractions, transportation and hotel sectors make up the top three and the overall index is 63.49 out of 100.

Tourism sectors	2010
Transportation	68.00
Attractions	66.49
Hotels	63.88
Tourist Related Public Sector	61.81
Retail Shops	60.98
Restaurants	60.64
Shenzhen TSI	**63.49**

Other Notes

15. The MTSI project is part of ITRC-IFT's thrust to make academic research more accessible to the general public and more collaborative between industry and scholars. The MTSI project is supported by the Macao Government Tourism Office (MGTO).

16. For further information about the Macao TSI, please contact Ms. Wendy Tang (T: 8598-3015; E: itrc@ift.edu.mo) or view the ITRC website: www.ift.edu.mo/itrc (currently in English only).

17. For further information about the Hong Kong TSI, please contact Prof. Haiyan Song (T: 2766 6372; E:hmsong@polyu.edu.hk) or visit the website: www.polyu.edu.hk/htm.

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