

Macao Visitor Profile Study

Press Conference
International Tourism Research Centre
Institute for Tourism Studies, Macao

21 October 2011



ITRC
International Tourism Research Centre, IFT

About the VPS - Methodology

- Data comes from quarterly field surveys of visitors
- Conducted between Q4 2009 to Q2 2011
- A sample size of 5,016 visitors
- Location interviews are carried out at popular tourist attractions and border entry points



ITRC
International Tourism Research Centre, IFT

Outline of Presentation

- Length of Stay – Longest and shortest
 - Purpose of visit
 - Trip arrangement
 - Frequency of visit
 - Source market
- Tourism Activities of non-gambling visitors
 - source market
- Willingness to revisit
 - Purpose of visit
 - Trip arrangement
 - Frequency of visit
 - Source market



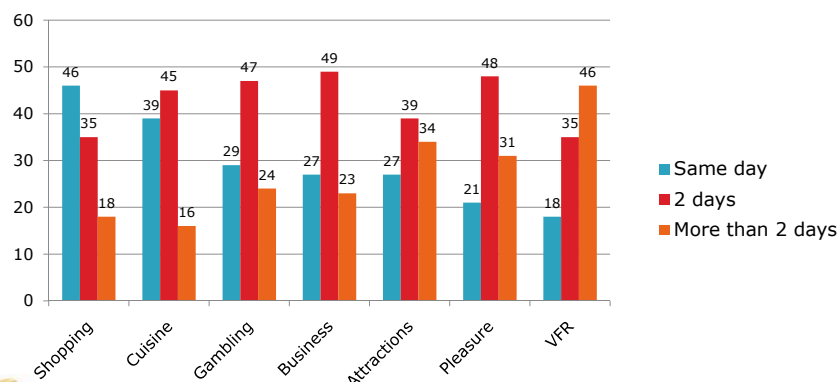
ITRC
International Tourism Research Centre, IFT

3

Major Findings - Trip characteristics

The average length of stay for VFR is the longest, on average 3.1 days with 81% stay over 1 day.
While those visit Macao for shopping has the shortest length of stay.

Length of Stay by Purpose of Visit

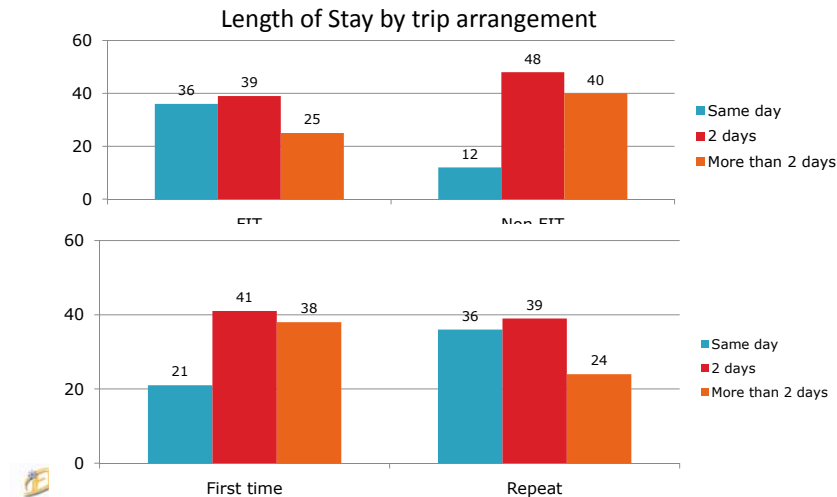


ITRC
International Tourism Research Centre, IFT

4

Major Findings - Trip characteristics

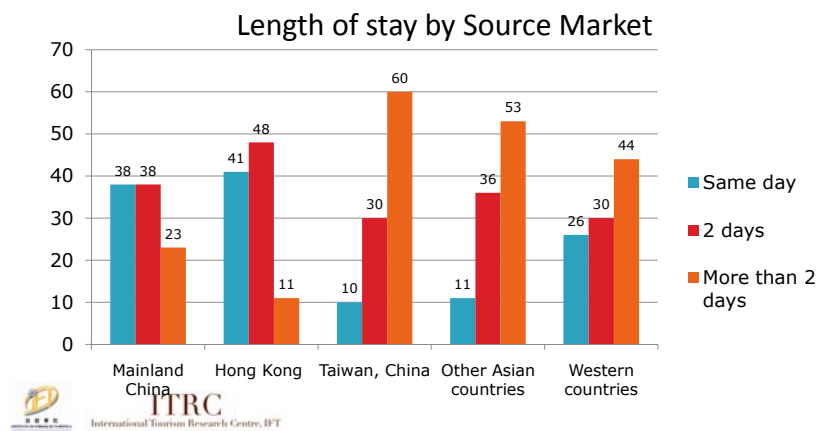
- Non-FIT (average 2.5 days) with 88% stay over 1 day;
- First time visitors (average 2.6 days) with 79% stay over 1 day



5

Major Findings - Trip characteristics

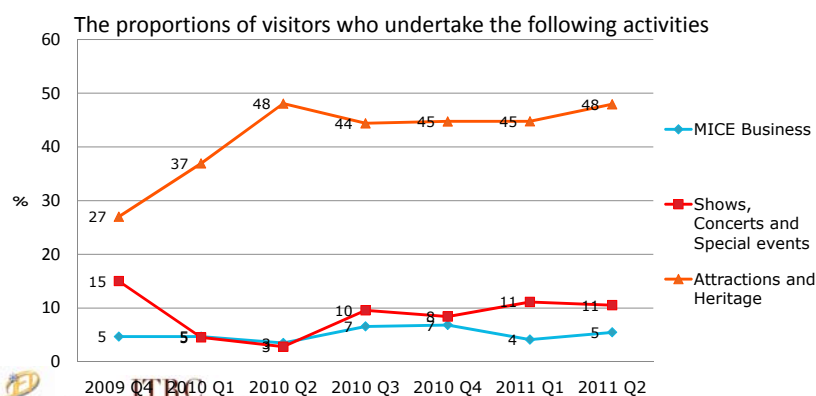
- Visitors from Taiwan China and S E Asian visitors with 90% and 89% stay over 1 day respectively.
- Those from Hong Kong stay the shortest with 41% are same day visitor.



6

Major Findings –Non gambling activities

- Shopping and cuisine are the main activities of visiting Macao.
- There are seasonal fluctuations for the overall trend of MICE business and shows, concerts and special events.



7

Major Findings –Non gambling activities

	2009 Q4	2010 Q1	2010 Q2	2010 Q3	2010 Q4	2011 Q1	2011 Q2
MICE Business							
Mainland China	1	3	1	7	7	2	4
Hong Kong	6	5	2	6	5	2	6
Taiwan, China	4	5	7	8	10	15	11
S E Asian Countries	0	9	12	5	9	11	7
Western Countries	0	4	11	9	0	3	0
Grand total	5	5	3	7	7	4	5
Shows, Concerts and Special events							
Mainland China	5	5	2	7	5	7	9
Hong Kong	7	5	4	6	11	15	14
Taiwan, China	9	5	5	12	13	13	16
S E Asian Countries	7	0	4	20	7	19	8
Western Countries	23	7	5	27	19	17	0
Grand total	15	5	3	10	8	11	11
Attractions and Heritage							
Mainland China	26	39	44	37	39	46	47
Hong Kong	24	34	48	36	32	36	39
Taiwan, China	44	40	58	64	67	45	57
S E Asian Countries	38	30	57	70	76	61	63
Western Countries	17	50	45	66	88	67	62
Grand total	27	37	48	44	45	45	48

- As for MICE business, the proportion of Taiwanese visitors increased by 57% year-on-year for Q2 2011.
- As for the Shows, Concerts and Special Events, there is a steady growing trend among visitors from Hong Kong and Taiwan. For Q2 2011, the proportion increased by 250% and 220% year-on-year respectively.
- As for Heritage attractions, visitors from SE Asian and Western countries showed the most significant increase with a year-on-year growth of 11% and 38% respectively.

8

Major Findings –Willingness to visit Macao again

- There are only 4% of the total respondents showing unwillingness to visit Macao again.
- The most unlikely to revisit Macau are those visitors who visit attractions and MICE business as purpose of visit, non-FIT, first time, and visitors from Taiwan, SE Asian, western countries

(in percentage)	Unlikely	Likely	Total
Purpose of visit			
Attractions	7	93	100
Shopping	4	96	100
VFR	3	97	100
Pleasure	4	96	100
Cuisine	2	98	100
Gambling	2	98	100
Business	7	93	100
Trip type			
FIT	3	97	100
Non FIT	10	90	100
Frequency of visit			
First time	9	91	100
Repeat	3	97	100
Source Market			
Mainland China	4	96	100
Hong Kong	2	98	100
Taiwan, China	8	92	100
S E Asian countries	8	92	100
Western countries	8	92	100



ITRC
International Tourism Research Centre, IFT

9

Implications

- Results show that visitors from Taiwan and S E Asia stay the longest and more of them among those who appear to be unlikely to revisit Macau. However, the trend shows that the former 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 putting more effort in promoting the MICE business and world heritage activities to meet their interest accordingly.
- As per the current trend in tourism activities by overall visitors, there is a potential to diversify the tourism activities by increasing effort to promote shows and concerts because there is a steady growth in the year-on-year trend especially among visitors from Mainland China, Hong Kong and Taiwan, China.



ITRC
International Tourism Research Centre, IFT

10

Implications

- As those with the primary purpose of visiting attraction are unlikely to revisit Macau, the government and tourist board and the industry should work together to develop more attractions so as to retain this market.
- Relatively, non-FIT visitors stay longer than FIT visitors, but about 10% of them are unlikely to visit Macau again. There is a need to attract them by diversifying tourism activities in addition to the existing tour package.



ITRC
International Tourism Research Centre, IFT

11

Contact Us

**International Tourism Research Centre
Institute for Tourism Studies, Macao**

TEL: 85983-015

FAX: 85061-283

EMAIL: itrc@ift.edu.mo

WEBSITE: www.ift.edu.mo/itrc



ITRC
International Tourism Research Centre, IFT

12