

Macao Visitor Profile Survey

2nd Quarter Report

Conducted by
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The Macao Visitor Profile Survey (VPS) is published quarterly by ITRC. In addition, ITRC publishes special focus reports on related themes that are of public interest.

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Macao Visitor Profile Survey (VPS)

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1. About the VPS

A. Objectives

- 1) To provide tourism policy and decision makers, planners and members of the tourism and hospitality industry with up-to-date, regular and insightful information regarding the profile of visitors to Macao and how they evolve over time.
- 2) To supplement general visitor (tourism) data currently provided by the Macao Census and Statistics Department (DSEC), MGTO and the Immigration Service by:
 - a. Providing greater detail and analysis of behavioral and psychological variables.
 - b. Providing cross tabulated data analysis and presentation of practical use to managers and decision makers in both government and private organizations.
- 3) To provide a source of reference and information archive over time of the short- and long-term changes to the mix of visitors to Macao.
- 4) To provide reference data to help evaluate the impact and effectiveness of destination management and marketing efforts.

B. Methodology

Data for the second quarter of 2016 Macao Visitor Profile comes from field surveys of visitors conducted over a 9-day period between April and June 2016. Each survey date targeted a sample size of 114 visitors who completed at least half of their visit at the time of interview. Interview locations included major sites and terminals including the Border Gate, Ruins of St. Paul's, Rua do Cunha at Taipa, Senado Square, Hong Kong Macao Ferry Terminal and Macao International Airport. The final sample consisted of 1,030 visitors. The VPS seeks information from visitors primarily on (1) their purpose and reasons for visiting Macao, (2) their trip and travel characteristics, (3) travel and transportation arrangements, (4) accommodation arrangements, (5) major information source, (6) spending behavior, (7) visitor attractions visited, (8) gaming behavior, and (9) evaluation of their overall travel experience.

2. Major source markets, travel purpose and characteristics

A total of 1,030 visitors were surveyed in Q2 2016. Majority came from Mainland China (68%), Hong Kong SAR (17%) and Chinese Taiwan (8%). Around 7% of the respondents were from other Asian countries, Western countries, Malaysia and Singapore.

The majority of the interviewed visitors (85%) visited Macao mainly for leisure and vacation. The other main purpose for visiting Macao included visiting friends/ relatives (VFR) (8%), business (5%) and others (2%).

Figure 2.1: Place of residence (n=1,029)

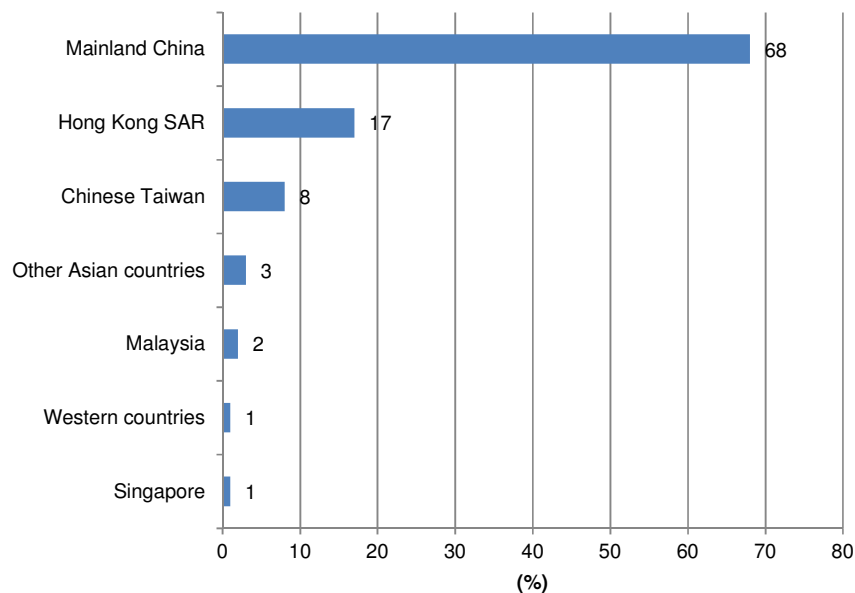
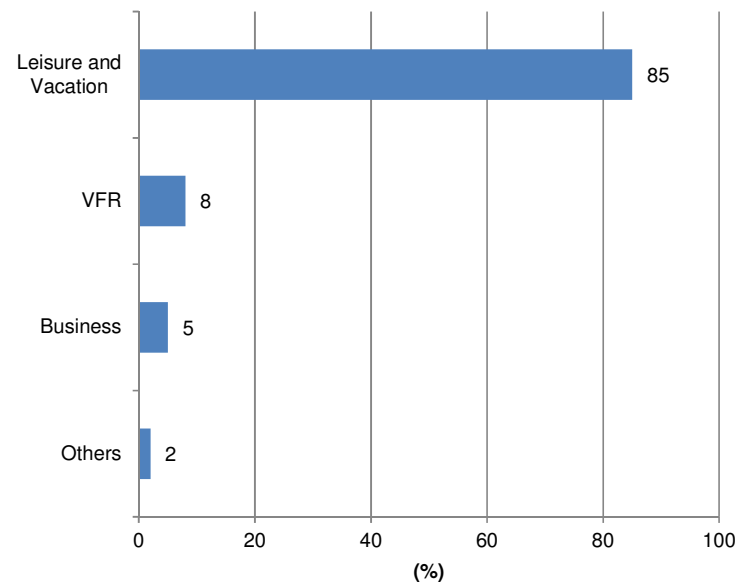
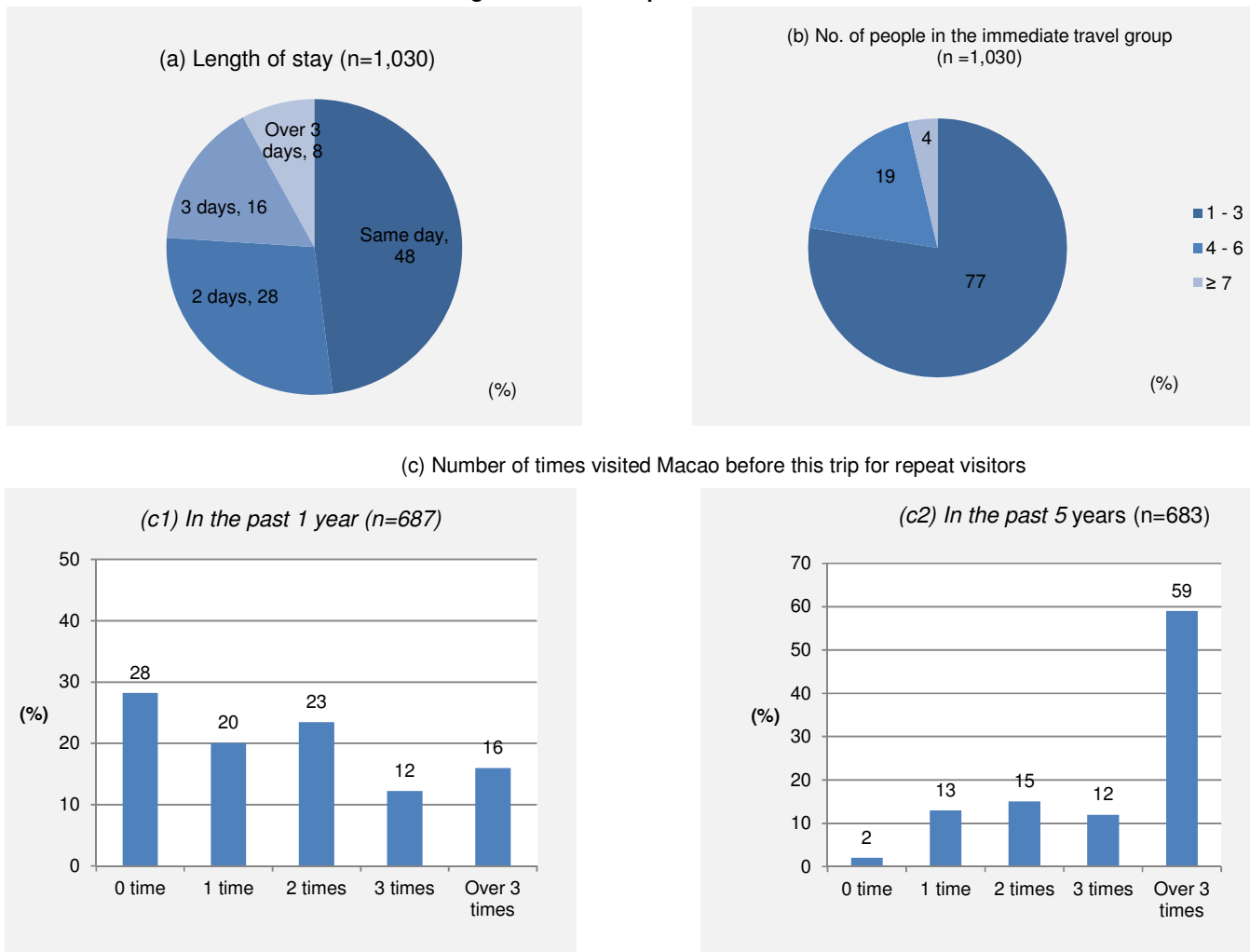


Figure 2.2: Primary purpose for visiting Macao (n=1,030)



About 52% of the respondents stayed overnight while 48% were same-day visitors. For overnight-staying visitors, 85% have planned to stay 2-3 days. About 77% visited Macao in a group comprising of 1-3 person(s); 19% came in groups of 4-6 individuals. Among those being interviewed, 67% were repeat visitors of which 59% have visited more than 3 times in the past 5 years.

Figure 2.3: Basic trip characteristics

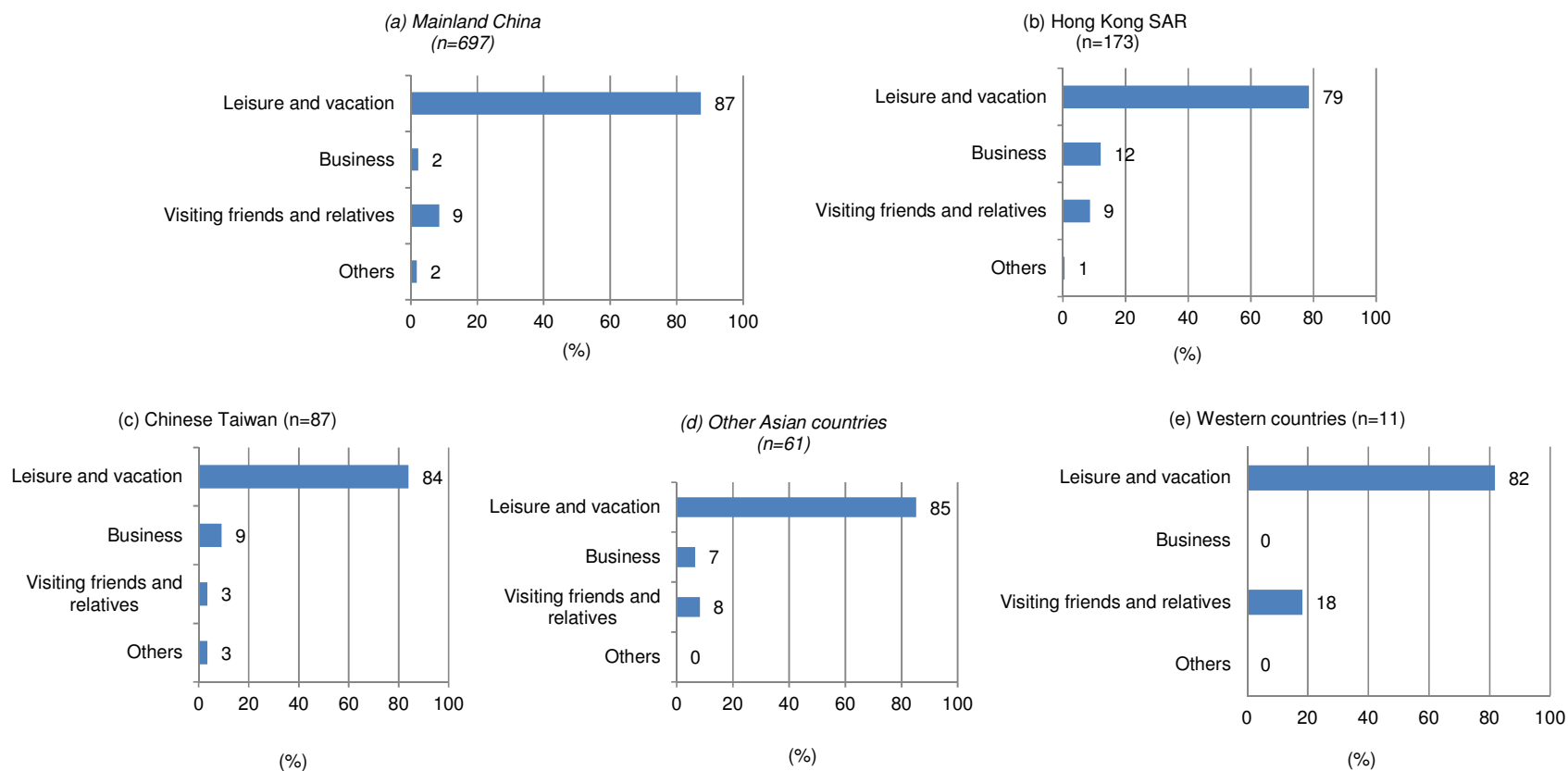


3. Travel characteristics by place of residence

3.1 Trip purpose by place of residence

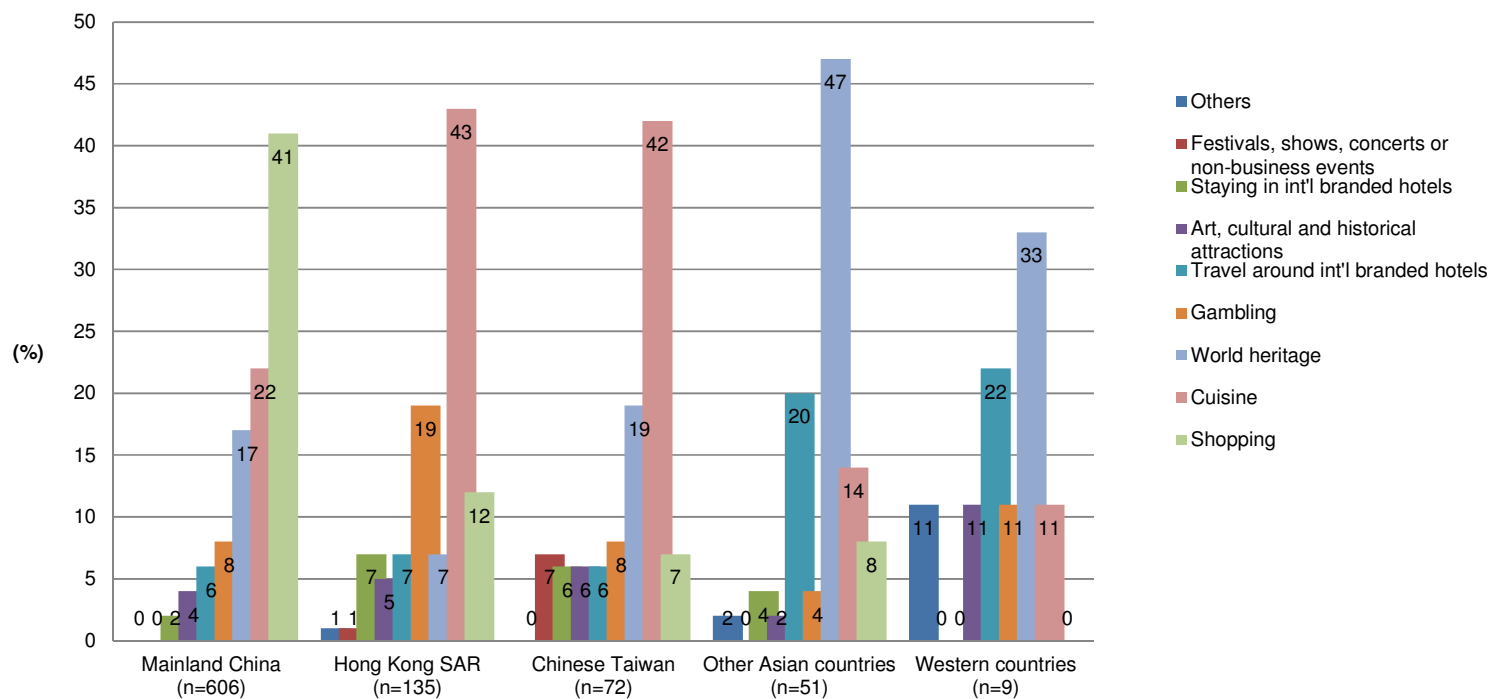
Visitors from Mainland China (87%), Hong Kong SAR (79%), Chinese Taiwan (84%), other Asian countries (85%) and Western countries (82%) visited Macao mainly for leisure and vacation.

Figure 3.1.1: Main reason for visiting Macao by place of residence



Among visitors whose main purpose of visiting Macao is for leisure and vacation, visitors from Mainland China considered shopping (41%) and visitors from Hong Kong SAR (43%) and Chinese Taiwan (42%) found cuisine as the most attractive factor. Visiting world heritage is the most attractive factor for visitors from other Asian countries (47%) and Western countries (33%).

Figure 3.1.2: Most attractive factor for visiting Macao for leisure and vacation by place of residence (n=873)



3.2 Trip characteristics by place of residence

Figure 3.2.1: Same-day or overnight-staying visitors by place of residence

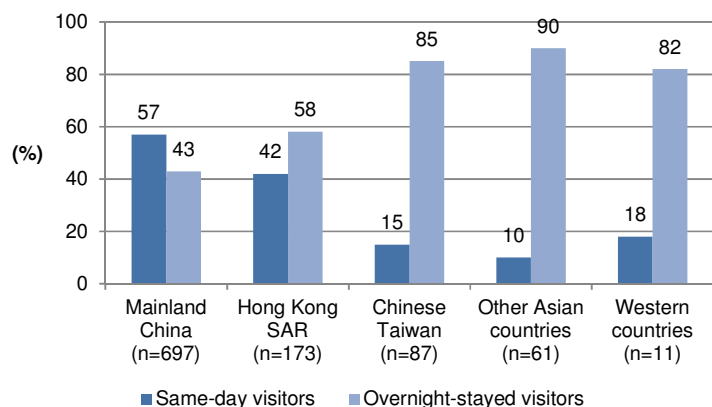


Figure 3.2.2: First or repeat visit by place of residence

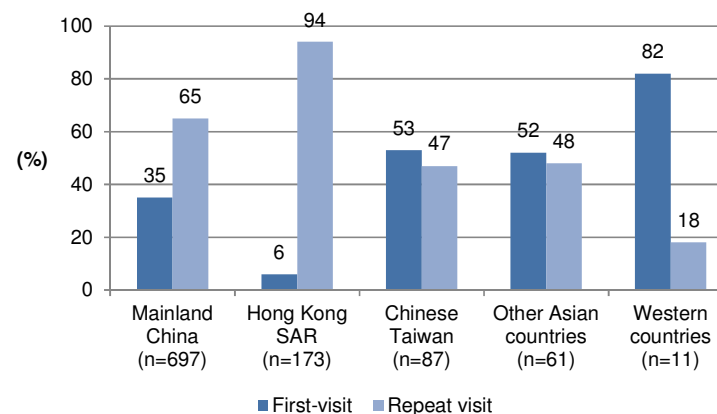


Figure 3.2.3: Travel arrangement by place of residence

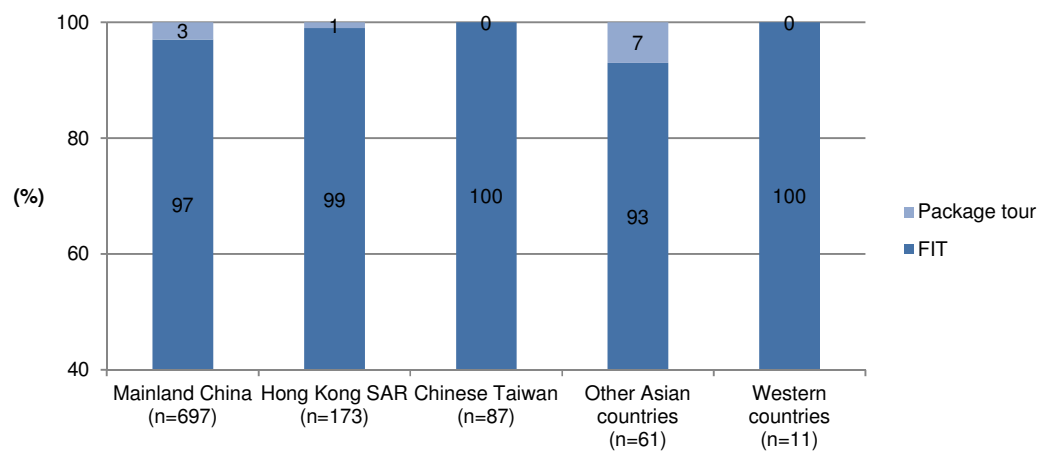


Figure 3.2.4: Length of stay by place of residence

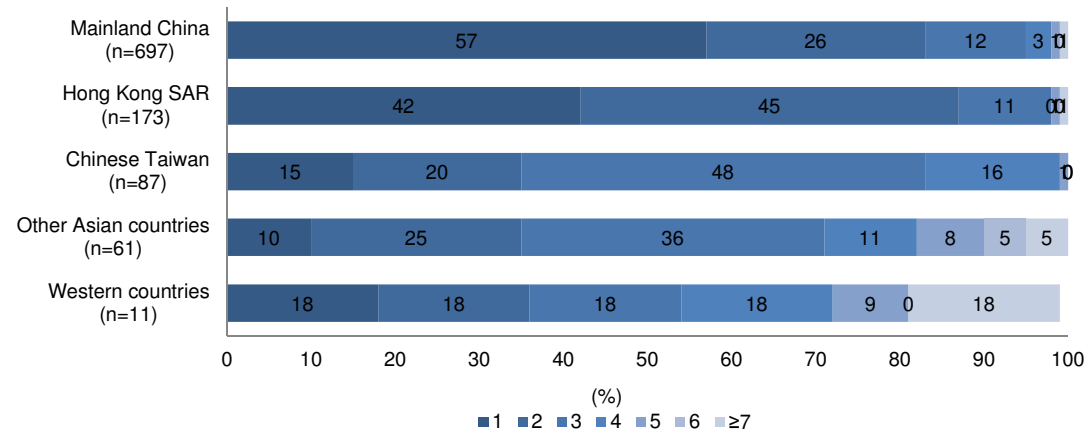
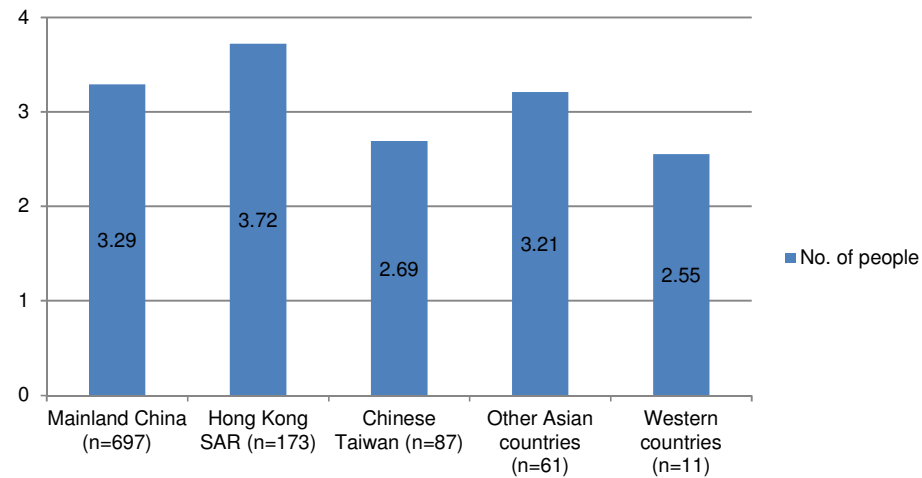


Figure 3.2.5: Average immediate group travel size by place of residence

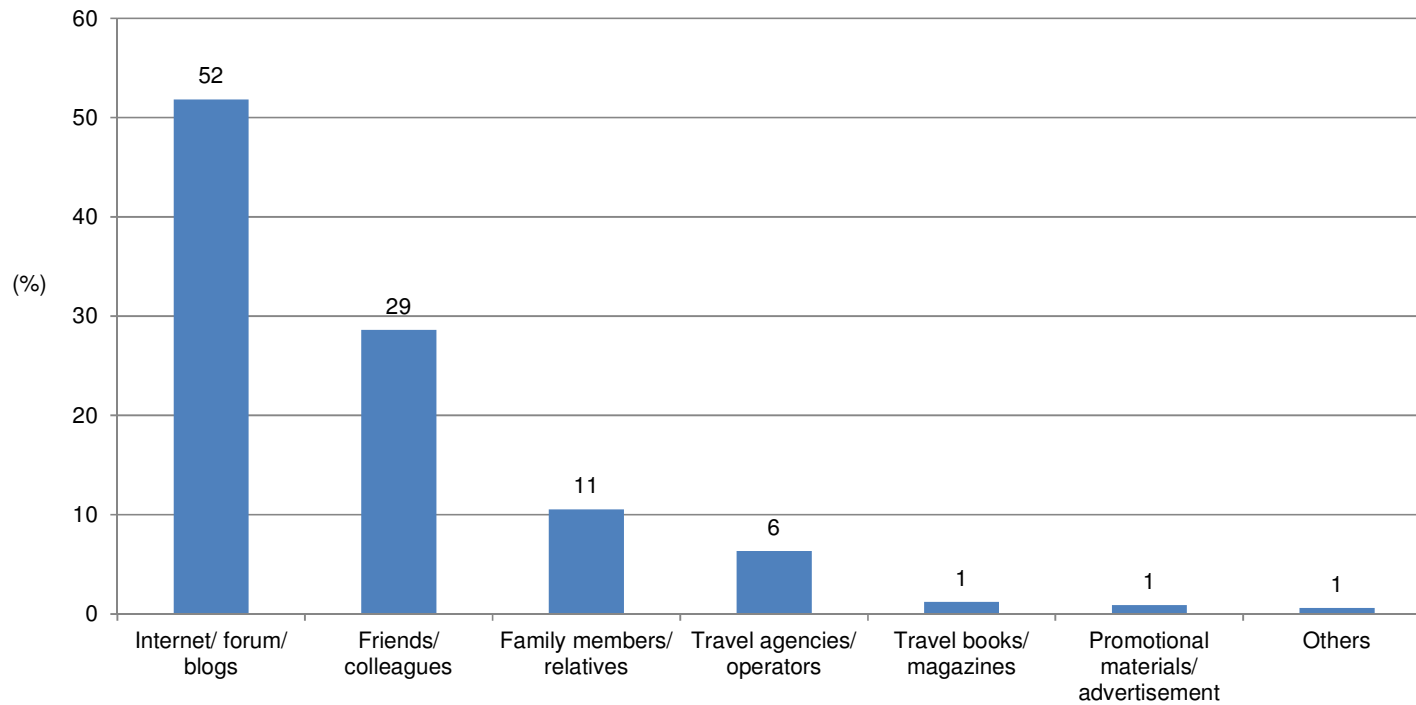


4. Major information sources

4.1 Major information sources

For planning their trip to Macao, first-time visitors found internet/ forum/ blogs (52%) and friends/ colleagues (29%) as most informative source for planning their visit.

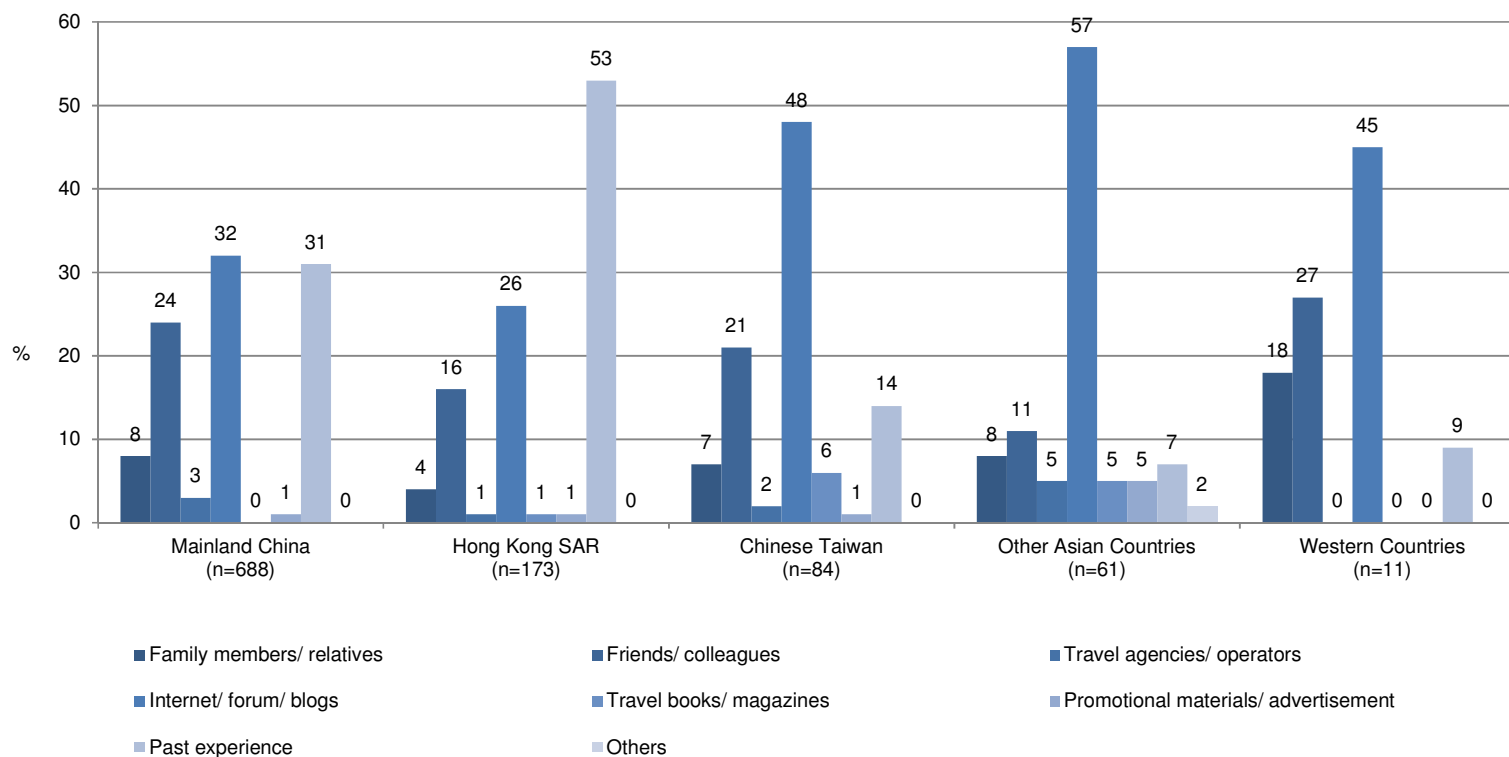
Figure 4.1: Media or source for information most influential in your decision to visit Macao by first-time visitors (n=332)



4.2 Information sources by place of residence

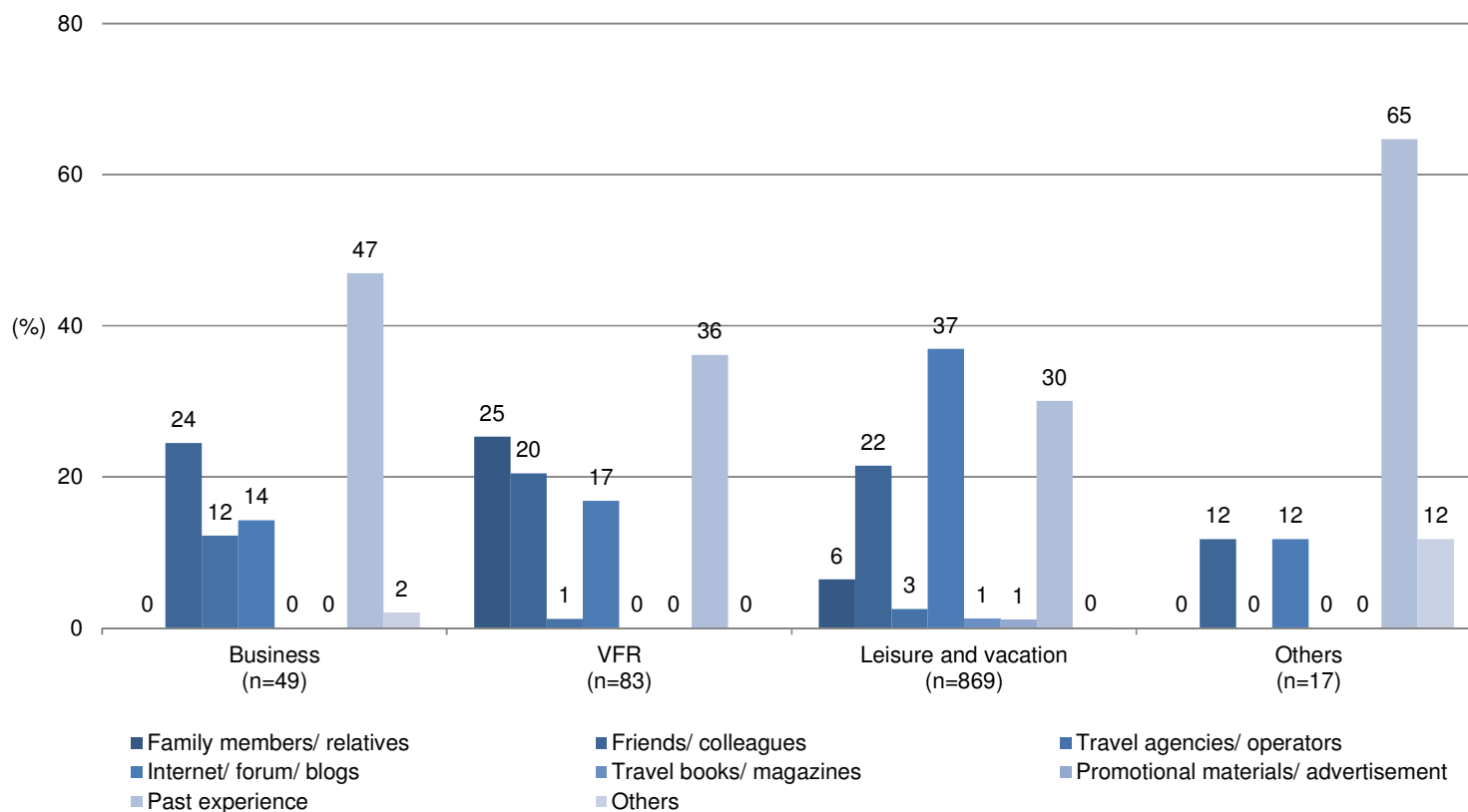
Past experience is considered to be the most important information source by visitors from Hong Kong SAR while visitors from Mainland China, Chinese Taiwan, other Asian countries and Western countries mainly search information from the internet/ forum/ blogs.

Figure 4.2 Information source by place of residence



4.3 Information sources by travel purpose

Figure 4.3: Information source by travel purpose



5. Travel arrangement and activity

5.1 Type of accommodation, overnight visitors

Figure 5.1.1: Type of accommodation (n=534)

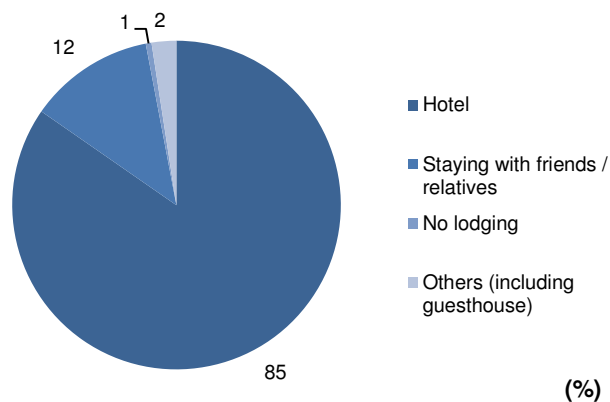
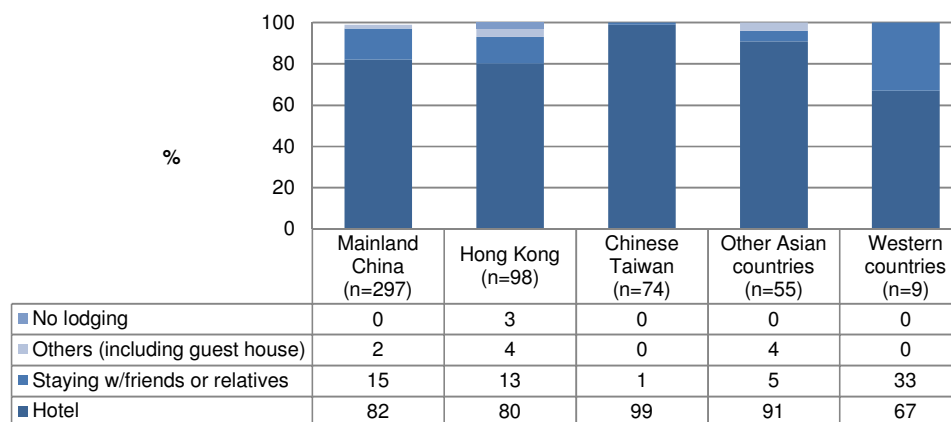


Figure 5.1.2: Type of accommodation by place of residence



5.2 Means of booking of FIT visitors, by place of residence

Respondents from Mainland China (67%) and Hong Kong SAR (44%), Chinese Taiwan (59%), other Asian countries (81%) and Western countries (71%) staying overnight in hotel/ guesthouse booked their accommodation through third party websites. Regarding transportation, the majority of the respondents from Mainland China and Hong Kong SAR booked their transportation directly from the service providers while the most respondents from Chinese Taiwan, other Asian countries and Western countries got their flight tickets from third party websites.

Figure 5.2.1: Means of booking accommodation (FIT visitors)

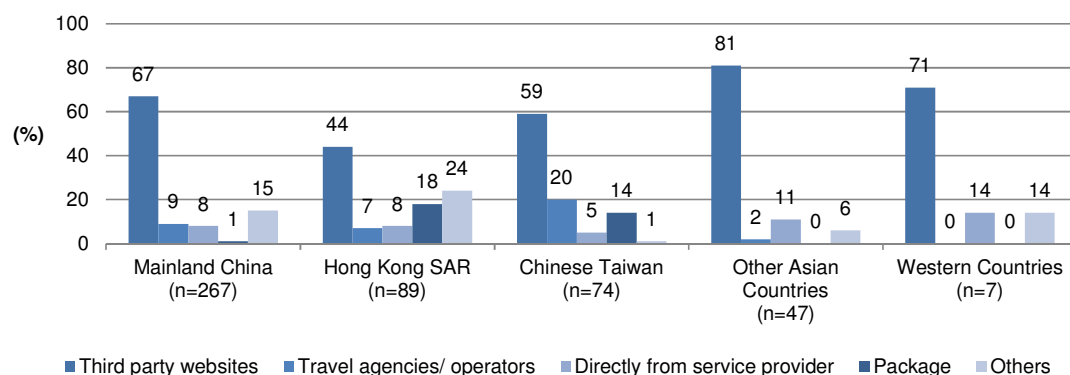
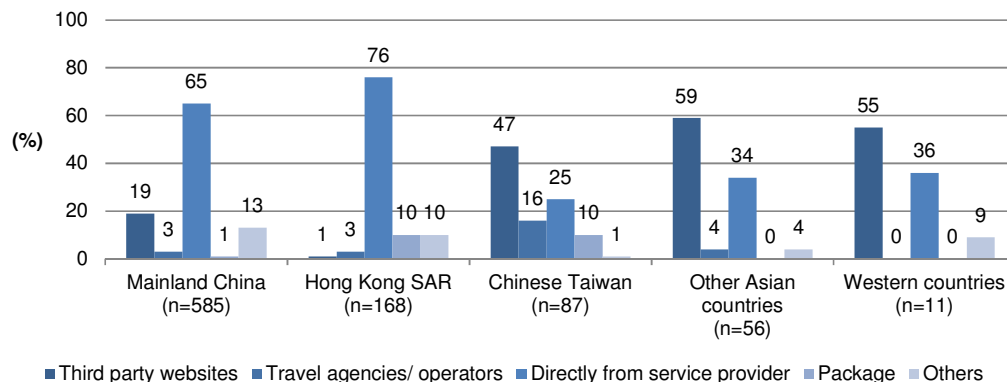


Figure 5.2.2: Means of booking transportation (FIT visitors)



5.3 Gambling behaviour

About 26% of the respondents reported having gambled during their trip. Among these, 25% spent less than MOP1,000.

Figure 5.3.1: Have you gambled in this particular trip? (n=1,030)

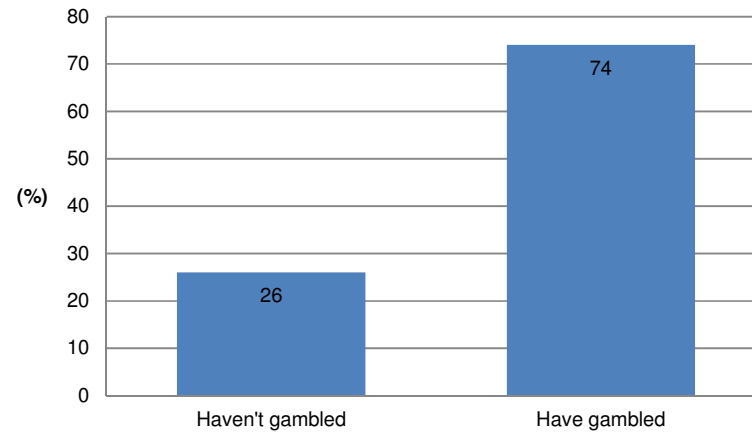
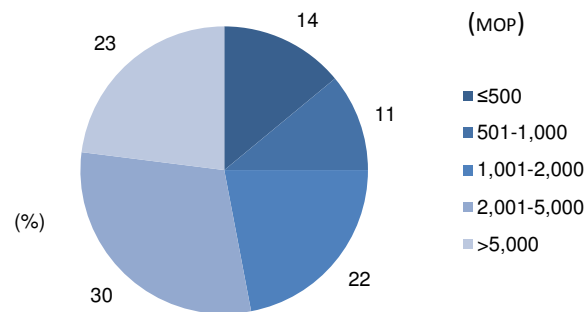


Figure 5.3.2: Gambling expenditure in MOP, among those who have gambled (n=225)

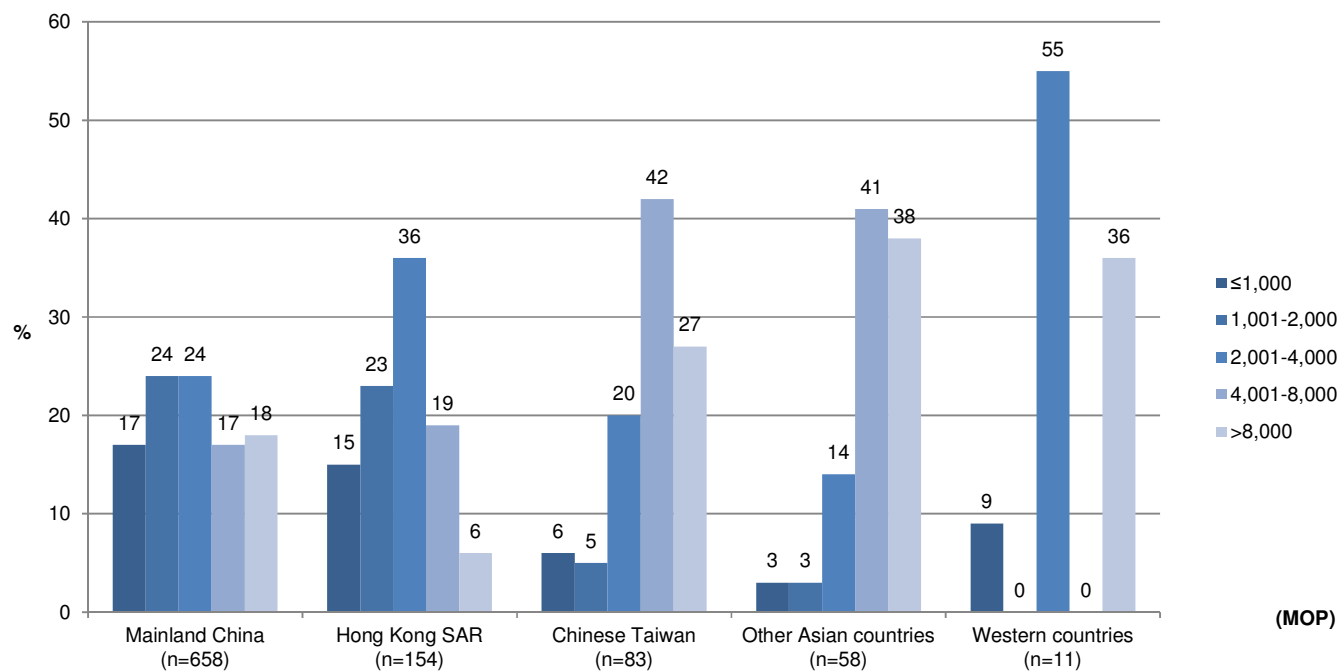


6. Budget, spending and satisfaction

6.1 Total budget by place of residence

The majority of the respondents from Chinese Taiwan (42%) and other Asian countries (41%) had budget of MOP4,001-8,000 while those from Hong Kong SAR (36%) and Western countries (55%) mostly had budget of MOP2,001-4,000. Almost half of the respondents from Mainland China (48%) had budget between MOP1,001 and MOP4,000.

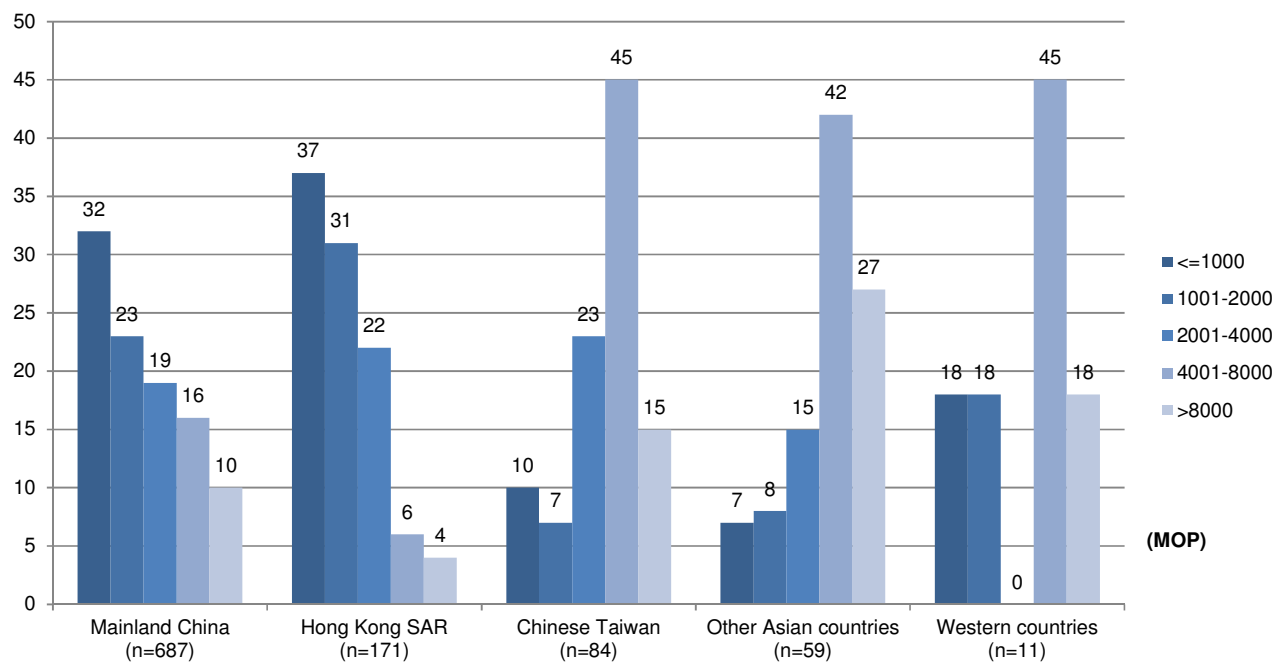
Figure 6.1: Total budget by place of residence



6.2 Total spending by place of residence

Most of the respondents from Chinese Taiwan (45%), other Asian countries (42%) and Western countries (45%) spent between MOP4,001-8,000. Majority of the respondents from Mainland China (32%) and Hong Kong SAR (37%) had expenditure ≤MOP1,000.

Figure 6.2.1: Total spending (excluding gambling) by place of residence



Note: Total trip budget is the amount which respondents have prepared for their estimated expenditure during the visit. Total expenditure is the amount of money they have spent thus far in this trip at the time of being interviewed.

The average spending of the visitors who travelled to Macao as FIT or by package tour including tour group fee, hotel/ hostel, transportation, shopping, food and beverage, and others (excluding gambling) is MOP3,820 and MOP4,533 respectively.

Figure 6.2.2: Average spending (excluding gambling) by arrangement type

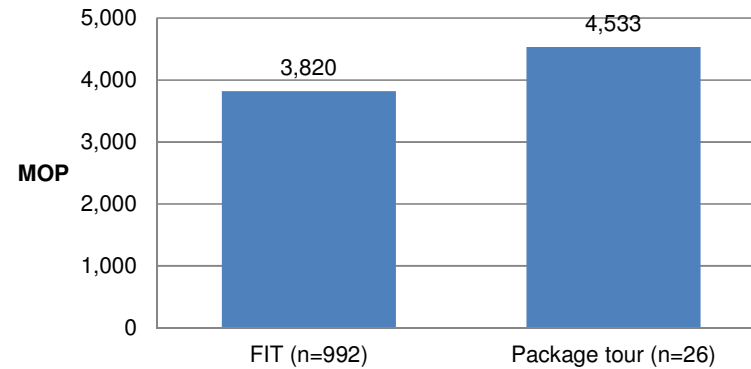
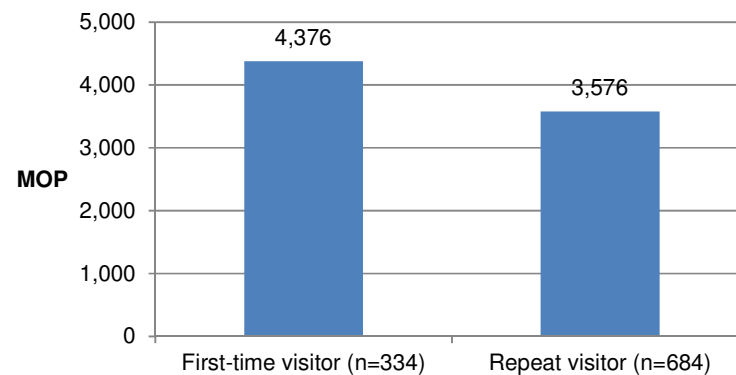


Figure 6.2.3 shows a comparison of the average spending among respondents from first-time and repeat visitor. The average spending of first-time visitors is higher with MOP4,376 while it is only MOP3,576 with the repeat visitors.

Figure 6.2.3: Average spending (excluding gambling) by first-time and repeat visitors



6.3 Recommending Macao as a destination and future visit

The interviewed visitors rated the propensity of recommending Macao as a destination and of future visit using a 7-point scale with 1 representing “definitely will not”, 2 “will not”, 3 “somehow will not”, 4 “neutral/ no comment”, 5 “somehow will”, 6 “will” and 7 “definitely will”. First-time and repeat visitors of the respondents somehow will recommend Macao as a destination to others with average scales of 5.74 (standard deviation = 1.18) and 5.74 (standard deviation = 1.07) respectively. In terms of intention to visit Macao again, first-time and repeat visitors have rated 5.57 (standard deviation = 1.37) and 6.08 (standard deviation =0.99) on average respectively.

Figure 6.3.1: Mean scale response of recommending Macao as a destination (mean (s.d.))

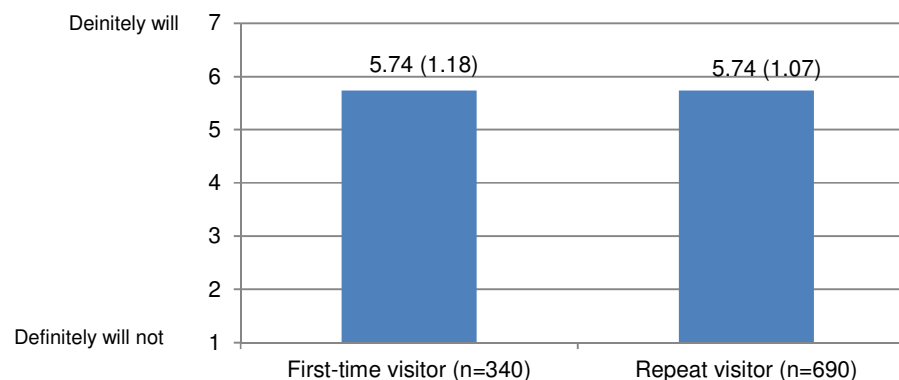


Figure 6.3.2: Mean scale response of intention to visit Macao again by first-time and repeat visitors (mean (s.d.))

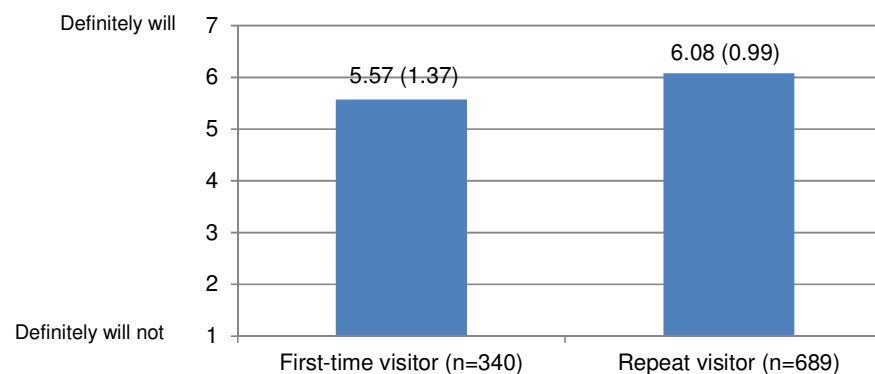


Figure 6.3.3: Mean scale response of recommending Macao by place of residence

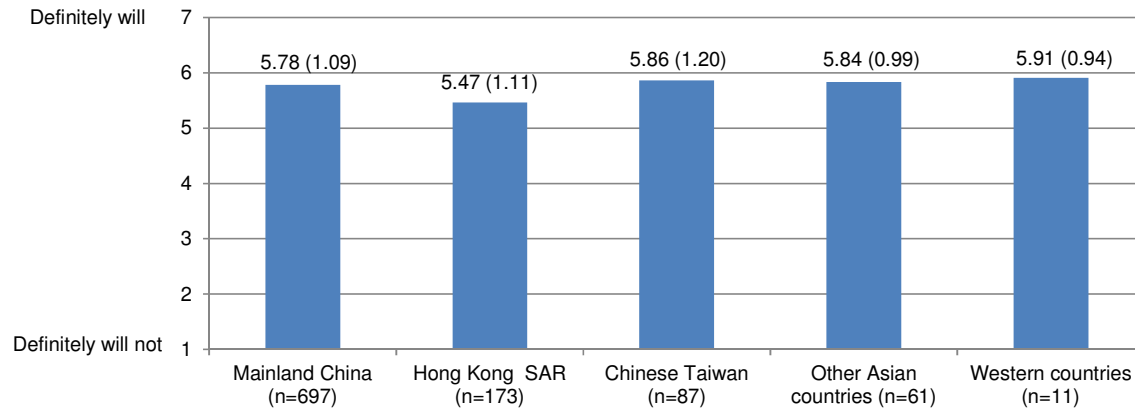
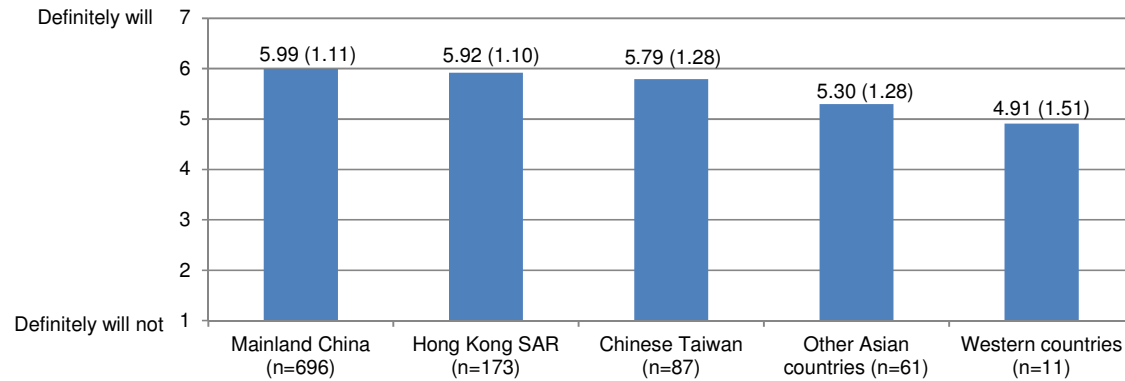


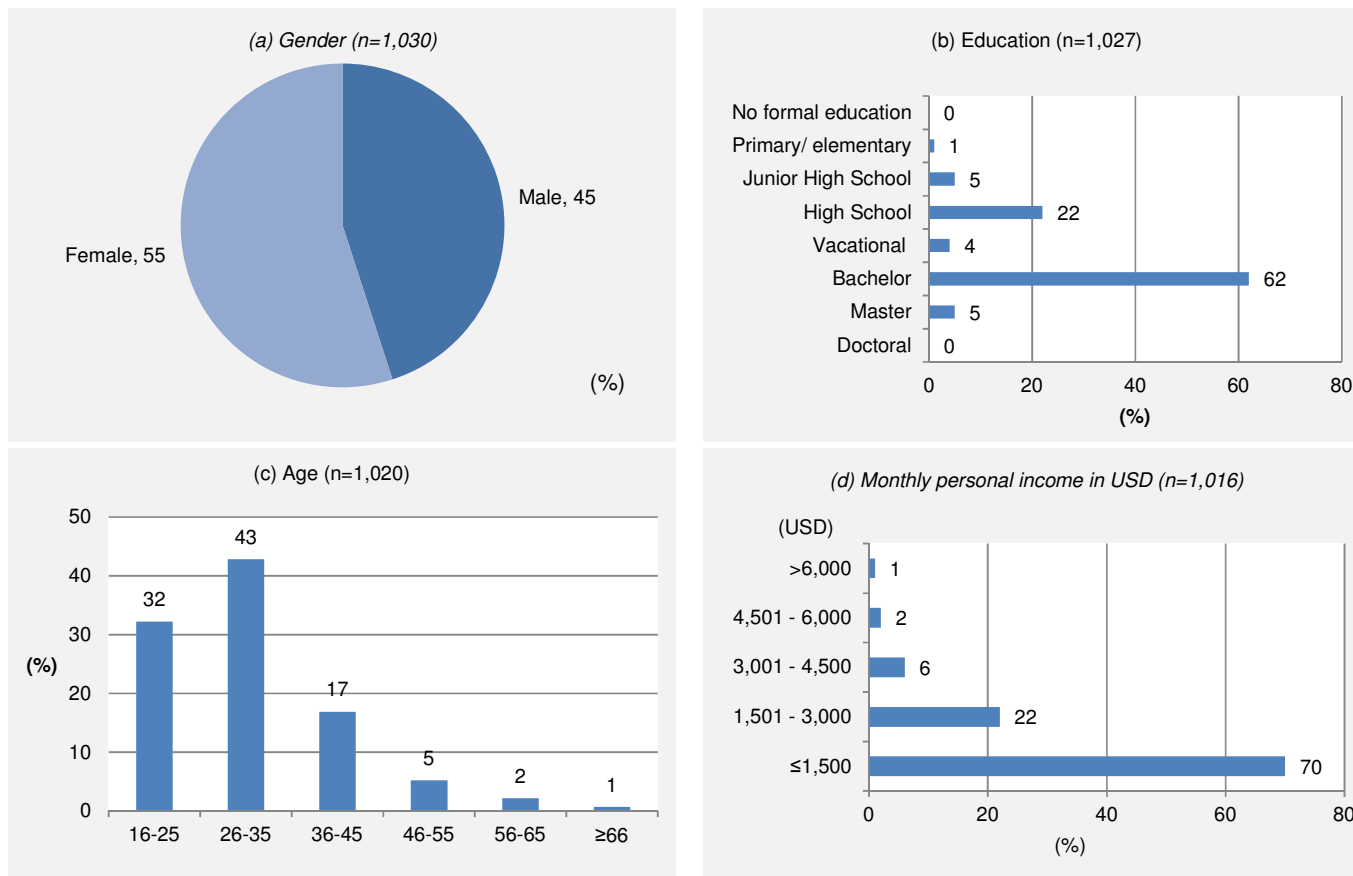
Figure 6.3.4: Mean scale response of intention to visit again, by place of residence



7. Demographics

About 55% of the respondents were female and 45% were male. Around 75% of the respondents were below 35 years old. Most of them are well-educated with 67% having attained tertiary degrees and 28% of respondents with monthly personal income between USD 1,501 and 4,500.

Figure 7.1: Visitors demographics



8. Summary table

Trip characteristics	Place of Residence														Total	
	Mainland China		Hong Kong SAR		Chinese Taiwan		Malaysia		Singapore		Other Asian countries		Other Western countries		2016 Q1	2016 Q2
	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2		
Primary purpose of this trip																
Business	2	2	9	12	1	9	7	0	14	22	0	6	0	0	3	5
VFR	8	9	13	9	9	3	7	6	7	0	6	11	29	18	9	8
Leisure and vacation	87	87	77	79	89	84	80	94	79	78	94	83	71	82	85	85
Others	3	2	1	1	1	3	7	0	0	0	0	0	0	0	3	2
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Main Information source of visiting Macao																
Family/relatives	8	8	8	4	8	7	13	24	14	0	12	3	0	18	8	8
Friends/colleagues	14	24	17	16	19	21	13	6	36	22	15	11	29	27	16	21
Travel agencies	4	3	1	1	11	2	0	0	0	0	18	9	0	0	4	3
Internet/forums /blogs	35	32	18	26	48	48	47	65	50	44	42	57	43	45	34	34
Travel books/ magazines	2	0	3	1	6	6	7	0	0	11	3	6	14	0	3	1
Promotional materials /advertisement	2	1	1	1	2	1	0	6	0	0	3	6	5	0	2	1
Destination tourist office in your residential region	0	-	0	-	1	-	7	-	0	-	0	-	0	-	0	-
Past experience	35	31	52	53	3	14	13	0	0	11	6	9	10	9	33	32
Others	0	0	0	0	1	0	0	0	0	11	0	0	0	0	0	0
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Trip characteristics	Place of Residence															
	Mainland China		Hong Kong SAR		Chinese Taiwan		Malaysia		Singapore		Other Asian countries		Other Western countries		Total	
	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2
Accommodation - staying where																
Hotel	42	36	35	46	89	84	60	88	79	78	73	80	52	55	47	45
Staying w/friends or relatives	7	7	9	8	8	1	7	0	0	0	3	9	24	27	7	7
Daytrip	51	57	53	44	2	15	27	12	21	11	24	9	24	18	45	48
Others (including guesthouse)	1	1	2	2	1	0	7	0	0	11	0	3	0	0	1	1
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
FIT - means to book accommodation																
Third party websites	29	26	22	23	54	51	47	71	43	44	50	71	52	45	31	30
Travel agency	4	3	2	4	29	17	0	0	0	0	11	3	0	0	6	4
Directly from the service providers	6	3	6	4	4	5	7	12	21	22	4	3	0	9	6	4
Package	1	0	2	9	1	11	7	0	0	0	4	0	0	0	1	3
No lodging in hotel /guesthouse	53	61	61	48	2	15	27	18	21	11	29	19	24	36	48	52
Others	7	6	8	12	9	1	13	0	14	22	4	3	24	9	8	7
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
FIT - means to book travelling tickets																
Third party websites	19	17	4	1	41	47	40	59	36	44	61	63	67	55	21	20
Travel agency	4	2	6	3	27	16	0	0	0	0	7	7	0	0	6	4
Directly from the service providers	56	56	72	75	27	25	47	41	57	33	25	30	33	36	54	55
Package	1	1	2	9	2	10	7	0	0	0	4	0	0	0	1	3
No travelling ticket	9	13	1	2	0	0	0	0	0	0	4	0	0	0	6	9
Others	12	11	16	10	3	1	7	0	7	22	0	0	0	9	11	10
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Trip characteristics	Place of Residence															
	Mainland China		Hong Kong SAR		Chinese Taiwan		Malaysia		Singapore		Other Asian countries		Other Western countries		Total	
	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2
Budget - total (coded)																
≤1,000	8	17	14	15	0	6	0	0	0	0	0	6	0	9	7	15
1,001-2,000	15	24	22	23	5	5	0	7	10	0	4	3	0	0	14	21
2,001-4,000	27	24	32	36	15	20	20	7	0	0	36	20	12	55	26	25
4,001-8,000	23	17	18	19	45	42	20	29	60	56	25	43	59	0	26	21
> 8,000	27	18	13	6	35	27	60	57	30	44	36	29	29	36	26	18
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Spending (excluding gambling)-total (coded)																
≤1,000	26	32	44	37	4	10	29	7	15	11	10	6	11	18	26	29
1,001-2,000	22	23	25	31	11	7	7	13	0	0	21	9	11	18	21	22
2,001-4,000	19	19	24	22	15	23	7	13	31	33	3	11	5	0	19	20
4,001-8,000	19	16	5	6	47	45	21	40	23	22	41	49	11	45	20	19
> 8,000	14	10	1	4	22	15	36	27	31	33	24	26	63	18	14	10
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Trip characteristics	Business		VFR		Primary Purpose Leisure and vacation		Others		Total	
	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2
Times of Visit in 1 Year										
First time visit	29	6	23	19	23	165	27	4	23	28
Repeated visit										
1 time	5	7	16	12	21	118	9	1	20	20
2 times	14	7	29	24	23	126	36	4	24	23
3 times	14	8	19	4	14	70	5	2	14	12
Over 3 times	38	11	14	9	19	88	23	2	19	16
Total	100	100	100	100	100	100	100	100	100	100
Times of Visit in 5 Years										
First time visit	0	0	1	0	1	2	0	0	1	2
Repeated visit										
1 time	5	10	10	12	13	13	9	8	12	13
2 times	10	13	9	10	14	15	18	23	13	15
3 times	10	13	16	9	9	12	9	0	9	12
Over 3 times	76	64	64	69	64	57	64	69	64	59
Total	100	100	100	100	100	100	100	100	100	100
Trip Type										
FIT	97	82	100	100	97	98	96	100	97	97
Group Tour	3	18	0	0	3	2	4	0	3	3
Total	100	100	100	100	100	100	100	100	100	100
Length of Stay										
Same day	27	33	22	25	47	50	65	100	45	48
2 days	40	24	37	36	30	28	12	0	31	28
3 days	30	18	13	26	15	16	8	0	15	16
Over 3 days	3	24	29	13	7	6	15	0	9	8
Total	100	100	100	100	100	100	100	100	100	100

Trip characteristics	Gender				Age											
	Male		Female		16 - 25		26 - 35		36 - 45		46 - 55		56 - 65		>65	
	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2	2016 Q1	2016 Q2
Visiting type																
Same-day	45	44	44	51	48	61	44	46	38	28	50	34	55	64	38	14
Overnight	55	56	56	49	52	39	56	54	62	72	50	66	45	36	63	86
First visit	35	31	35	34	40	38	34	35	31	23	27	25	25	23	38	0
Repeat visit	65	69	65	66	60	62	66	65	69	77	73	75	75	77	63	100
Travel arrangement																
FIT	98	99	97	96	99	99	99	97	95	95	93	92	100	100	88	100
Group Tour	2	1	3	4	1	1	1	3	5	5	7	8	0	0	13	0
Primary purpose of this trip																
Business	5	7	1	3	1	2	3	4	5	13	4	6	0	5	0	0
VFR	7	10	10	7	9	8	8	7	12	8	9	15	5	23	13	43
Leisure and heritage	86	80	85	89	86	89	87	87	82	78	85	77	95	73	88	57
Others	2	2	3	1	4	2	2	2	2	1	1	2	0	0	0	0

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