ENHANCING CONNECTIVITY OF TOURISM RESEARCH FOR BETTER PRACTICE

13 October 2014

Macau Government Tourist Office
INDEX

Tourism Situation

Enhancing Connectivity of Tourism Research for Better Practice
TOURISM SITUATION
ARRIVALS OF TOTAL VISITOR & INTERNATIONAL VISITORS 1995-2013

Inauguration of Macao International Airport
Macao SAR established
Liberalization of Gaming
Individual Visit Scheme
Inscribed on UNESCO World Heritage List
New system of visitor arrivals figures


International Total
Total (include non-resident worker)

* International Visitors exclude the Greater China
VISITOR ARRIVALS 2014
JAN-AUG

- **TOTAL VISITOR ARRIVALS**: 21.0 mil (+7.9%)
  - Length of Stay: 1.0/day

- **OVERNIGHT STAY VISITORS**: 9.8 mil (+2.7%)
  - Length of Stay: 1.9/day

- **HOTEL OVERNIGHT GUESTS**: 7.2 mil (+1.2%)
  - Length of Stay: 1.4/night

Source: DSEC
VISITOR ARRIVALS 2014
JAN-AUG

Source: DSEC

Top Ten Visitor Source Markets

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Arrivals</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>KOREA</td>
<td>373,652</td>
<td>+19.4%</td>
</tr>
<tr>
<td>5</td>
<td>JAPAN</td>
<td>200,700</td>
<td>+7.6%</td>
</tr>
<tr>
<td>6</td>
<td>PHILIPPINES</td>
<td>169,684</td>
<td>-6.1%</td>
</tr>
<tr>
<td>7</td>
<td>MALAYSIA</td>
<td>150,591</td>
<td>-8.7%</td>
</tr>
<tr>
<td>8</td>
<td>INDONESIA</td>
<td>131,457</td>
<td>-8.3%</td>
</tr>
<tr>
<td>9</td>
<td>SINGAPORE</td>
<td>122,667</td>
<td>+12.9%</td>
</tr>
<tr>
<td>10</td>
<td>THAILAND</td>
<td>121,760</td>
<td>-24.9%</td>
</tr>
</tbody>
</table>

- **MAINLAND CHINA**: 14,217,401 (+14.2%)
- **HONG KONG, CHINA**: 4,354,823 (-5.5%)
- **Taiwan, China**: 646,953 (-0.2%)
- **INTERNATIONAL**: 1,904,335 (+1.5%)
TOTAL VISITOR EXPENDITURE

2013
US$51.6 billion (+12.1%)

2014 Jan-Jun
US$27.7 billion (+6.6%)

GAMING
US$24.0 billion
+6.3%
86.7%

OTHERS
US$3.6 billion
+8.4%
13.3%

Source: DSEC
ENHANCING CONNECTIVITY OF TOURISM RESEARCH FOR BETTER PRACTICE
APPLYING TOURISM RESEARCH ON PROMOTION DEVELOPMENT – RUSSIA VISITOR PROFILE STUDY
1. Tourism Sector of Office of the Macau SAR in Beijing
2. Macau Economic and Cultural Office in Taiwan
3. Macau Tourism Promotion & Information Center in Portugal
Market Profile of Russian Federation

- Mutual Visa Exemption between Macao SAR & Russia Federation since October 2012
- Opening of MGTO Russia Representative Office in Moscow in January 2013

- Russian Visitor Arrivals
  - 2009: 7,806
  - 2010: 11,702
  - 2011: 16,512
  - 2012: 26,844
  - 2013: 30,528
  - 2014 Jan-Aug: 20,791

- Russian Overnight Stay Visitors
  - 2009: 4,151
  - 2010: 6,013
  - 2011: 8,416
  - 2012: 12,822
  - 2013: 14,992
  - 2014 Jan-Aug: 9,108
Russia Visitor Profile Study

Objective
- To understand the characteristics and travel behaviour of Russian visitors
- To explore perception of Asia, China and Macau

Period and Place
- October to December 2012
- Moscow and St. Petersburg

Methodology
- Consumer Focus Groups (Qualitative)
  8 focus groups in Moscow and St. Petersburg (4 in each city)

- Online Interviews (Quantitative)
  1,000 online interviews in Moscow, St.Petersburg and other Russian cities

- Desk research
  Analysis of statistics and open sources
Russia Visitor Profile Study – Major Findings

Preferred type of trip

- Beach vacation
- Sightseeing Tour
- Extreme trip
- Winter sports

Preferences in booking a trip

- Booking a trip in travel agency
- Self booking in the internet
Russia Visitor Profile Study – Major Findings

Preference of Multi-Destinations

- Hong Kong → Macau
- Guangzhou → Macau → Hong Kong
- Hong Kong → Macau → Hainan
- Dubai → Hong Kong → Macau

Key Visitor Segmentation

Moscow

Saint Petersburg
Perceptions and Motivation Factors to Visit Macau

➢ Historical and cultural uniqueness of the region: mix of Europe and Asia
➢ Convenience and accessibility: No visa regime and good transport accessibility
➢ Perfect region for multi-destination trips when traveling in China
➢ Attractive entertainments and festival events
➢ Casinos
MGTO Promotion in Russia

- MGTO first marketing target: Moscow
- MGTO appointed its Representative Office in Moscow in January 2013
- Joint Promotion
- Promotion of multi-destinations
- Main international travel fairs
- Networking functions with travel trade
Announcement of the Opening of
MGTO Representative Office on 19 March 2013 in Moscow
MGTO – HKTB Joint Media Event

Moscow Committee for Tourism
APPLYING TOURISM RESEARCH ON PROMOTION DEVELOPMENT

Luxury Travel Mart 2013 - Moscow
MITT 2013 - Moscow
APPLYING TOURISM RESEARCH ON PROMOTION DEVELOPMENT

Trade Seminars & Meetings
Russian Fam Trips to Macau
MGTO Promotional Tool in Russia

- Website
- Promotional Video
- Macau Printed Collaterals
APPLYING TOURISM RESEARCH ON PRODUCT DEVELOPMENT – COMMUNITY OPINION POLL FOR NEW ADD ON WALKING TOUR ROUTES
Community Tourism

- Cooperation with local organizations to develop community tourism
- Guidebook publication
- Organize community tourism activities: festivals, performance and carnivals
MGTO Launched First Walking Tour Routes Themed as "Step Out, Experience Macau's Communities" on 27 September 2013

- To encourage visitors to explore different areas in Macau on foot and to boost community tourism development

- "A Tour of Historical Trails"
- "A Tour of Nature and Creativity"
- "A Tour of East Meets West"
- "A Tour of Arts and Culture"
New Add On Walking Tour Routes

MGTO plans to introduce new add on walking routes under the same theme “Step Out, Experience Macau’s Communities”, to further divert visitors and alleviate the burden of congested tourist spots area

- Utilizing the Concept of “Parish”
- Indicate the Main Street
- Recommend near-by distinctive spots

- Nossa Senhora de Fátima Parish
- Santo António Parish
- Nossa Senhora do Carmo Parish
- São Francisco Xavier Parish
Before launching new tourism product – new add on walking tour routes, MGTO carried out the opinion poll survey to collect residents, businesses and visitors opinions.

A final report will be conducted to introduce the opinions and suggestions collected from the public.

The survey results of the opinion poll serve as important reference for evaluating the feasibility of introducing new add on walking tour routes and optimizing current routes in the future.
Objective:
To collect opinions from residents, businesses and visitors

Methodology of the Opinion Poll

- **Street Survey**
  Personal interviews with residents and businesses

- **Online Questionnaire**
  Macau residents, businesses and visitors can fill in the online questionnaire anonymously

- **Collection of Social Opinion**
  Organized briefing sessions open to public

- **Search on the Internet**
  Collected news and critic articles reported by traditional media and from online forums and social networks

- **Leisure Café**
  MGTO overseas representatives explored the new walking tour routes and provided opinions
Major Findings of the Opinion Poll – Interviewees’ suggestions

- Improve transportation, public and tourism facilities
- Optimize street environment and public hygiene
- Eliminate the influence on local residents
- Enhance residents’ recognition of tourist spots
- Optimize or add tourist spots signage
- Organize cultural activities along the new add on walking tour routes to attract visitors
- Add gourmet and shopping elements
Follow up Jobs:

- Optimization of walking environment
- Optimization of tourism signage
- Promotion and cultural performance
Optimization of walking environment
Optimization of signage
Promotion and cultural performance

Stamp Collection of "Step Out, Experience Macau's Communities"
Promotion and cultural performance

旅客及市民在遊歷過程中，持《論區行賞》蓋印咭在四條路線內的指定蓋章點收集印章，換取紀念品。
Thank You!