Tourism destination image development: a lesson from Macau

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Tourism destination image development: a lesson from Macau

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Abstract
Purpose – Drawing upon an analysis of resident and visitor survey data and Macau Government Tourist Office (MGTO) press releases in 2012, the purpose of this paper is to understand the tourism destination image for this tourist historic city produced by these three key stakeholder groups in Macau.
Design/methodology/approach – This is achieved using a new stakeholder analysis tool, developed from previous studies, which compares the perspective of the MGTO, the city’s destination marketing organization, with that of its residents and visitors. This study examines the perceptions that residents and visitors have about the general images projected and generated in Macau.
Findings – This research highlights the multiplicity of images and producers of images in Macau.
Originality/value – The lesson from this case study is that public sector agencies need to acknowledge more clearly the tourism planning role of the host community in particular. The possibility of detecting disconnections and misalignments of shared destination imagery by residents and visitors has implications for the public sector in Macau and other destinations in relation to managing and developing a destination and contributes to a greater understanding of stakeholders and sustainable tourism development overall.

Keywords Destination image, Tourism planning, Macau, Stakeholder views, Community involvement, DMO

Paper type Research paper

Introduction

A well-recognized destination image is essential to the tourism industry’s health in a destination and it is now increasingly common for destinations to plan or manage their images accordingly. The tourism image can be understood by the interrelationships between stakeholders and in turn their linkages to interests in various benefits. Accordingly, to create a common purpose amongst stakeholders in relation to their projection of images about the destination seems logical and will assist in producing more coherent tourism planning and destination marketing to attract visitors. Timothy (1998) suggests that participation in tourism planning by many stakeholders can help to promote sustainable development by increasing efficiency, equity, and harmony. Therefore, it is crucial for sustainable tourism and responsible marketing to involve various stakeholders and consider the feasibility of marketing proposals given the local conditions and realities. It should not all be carried out by a destination marketing organization (DMO) in isolation from the stakeholders, particularly the community. Thus, it is suggested that the DMO should look for more innovative approaches to the destination branding process in order to achieve sustainable tourism development. Such initiatives, in conjunction with the images projected by the Government and the images from visitors, would include an analysis of those images proposed by different stakeholders in the destination as well, enabling the image issues to be considered comprehensively in order to achieve sustainable tourism development goals.

As such, this study is about the converging and conflicting city image produced by Macau’s DMO, its residents and its visitors. Macau’s population in 2013 numbered around 586,300 in an
area of 29.9 square kilometres, with visitor arrivals for the entire year of 2014 totalling 31,525,632. Of these arrivals, the key countries of origin were Mainland China (67.4 per cent) followed by Hong Kong (20.4 per cent), and Taiwan (4.5 per cent) in 2014. Mainland Chinese visitors have become Macau’s largest tourist source market. Each visitor stays for an average of 1.0 night(s) (Macau Statistics and Census Service, 2015). The blossoming of the gaming business contributes not only to the visitor flow but also to the visitor expenditure. The positive impact of Macau’s gaming industry is undeniable. Between 2005 and 2008, Macau’s gross gaming revenue increased from US$5.9 billion in 2005 to US$13.7 billion in 2008, with an average annual growth rate of more than 30 per cent (Macau Statistics and Census Service, 2015). To reduce the dependence on the gaming sector, the Macau Government has shown its desire to develop non-gaming tourism to ensure the stability of its economy and tourism development and to capitalize more on the inscription of UNESCO World Heritage Sites in 2005.

Tourism is a pillar industry for Macau. Therefore, its DMO is expected to take a lead role in the destination’s marketing and recognize that different types of marketing communications, such as the press release, are only one part of image development. The destination experience is also a key to successful destination development (Day et al., 2012). In addition, it should be taken into account that the residents of a destination form a fundamental view from the destination image (Zouganeli et al., 2012) but research on Macau’s destination image commonly overlooks the residents as stakeholders. As such, it is important to understand more about the residents’ images of their home as a tourism destination, to add to theoretical and empirical work on the subject of visitor images. Accordingly for successful destination development, DMOs must develop strategies to align tourism system members, particularly stakeholders such as tourists and residents. Their images need to be aligned positively to support sustainable development (Ong et al., 2014). This issue is one that has not received enough attention in previous tourism management studies (Hankinson, 2004). Thus, this study aims to identify the images from DMOs (current tourism images), local residents (desired images), and visitors (perceived images). Then, compare and contrast them to assess the degree to which they conform to a common understanding amongst all three groups of the city’s tourism destination images. More specifically, the authors seek to contribute to Macau’s strategic goal of sustainable tourism development as supported by an appropriate destination marketing strategy. Evaluating the effect of the images projected by the government and the ways in which images are produced and consumed by residents and visitors of Macau, to determine whether information can be gleaned that will assist in achieving such goals.

Literature review

Destination images

Destination image has been a topic of discussion in tourism research for over 40 years. Destination image is the set of associations that people have of the destination (Day et al., 2012). Destination image is regarded as a pre-existing concept corresponding to destination branding (Pike, 2009). Gunn (1988) suggests images that are formed at two levels: organic and induced. The organic image is developed through an individual’s everyday assimilation of information, which may include a wide range of mediums, from school geography readings, to mass media, to actual visitation. The induced image is formed through the influence of tourism promotions directed by marketers, such as advertising. This process usually occurs when an individual begins sourcing information for a holiday. Several researchers have suggested destinations receive competitive advantage through effectively developing destination image, there has been little examination of how destination image should focus. Comparatively, destination marketers should focus on modifying an induced image, since they can do little to change an organic image. There is an image change agent involved in considering an induced image, such as, through traditional advertising, information received from tour operators, second-party endorsement through traditional advertising, and second-party endorsement through seemingly unbiased
affected by the causes or consequences of an issue

Stakeholders and tourism planning

Tourists, residents, and DMOs. Which measure should be preferred. As a result, this paper is to investigate the images of visitors, measures of destination image and little guidance is available to researchers and data analysts on (Boo and Busser, 2006). The authors attempt to assess the comparative validity of these different employed longitudinal research to measure the actual change in image among the target groups and those of residents and other stakeholders. Even fewer studies of image change have actually difficult to develop tourism in a sustainable manner (Andereck and Vogt, 2000; Andriotis, 2005). Without stakeholder support in the destination, it is businesses, employees, local government officials, competitors, entrepreneurs, tourists, activist organization. Applying those definitions in the tourism context, the stakeholders include local state that the group or individual identified as a stakeholder must have a legitimate interest in the

Destination image measurement take measure once in empirical survey studies to first, assess how tourists currently view a destination, second, define how the destination would like to be perceived by tourists, third, develop and implement marketing action to modify destination image, and fourth, check if the intended change in destination image has occurred (Dolnicar and García et al. 2012) reveal the risks of a traditional strategy focused only on visitors that ignores the objectives of local people and entrepreneurs. This underlines the importance of considering place image not only as something perceived by visitors, but also as produced, promoted, and mediated by tourism producers and other stakeholders.

In the case of Macau, there have been numerous previous studies of tourism in Macau, but relatively few of these have been specifically concerned with images. Very often, the “image” of Macau is imputed from the type of tourism that Macau attracts and the activities and motivations of visitors. As Hobson (1995) points out, “65 per cent of visitors come to Macau to gamble”. A study by McCartney (2004) of the image of Macau among visitors to the Macau Grand Prix in 2003 indicates that the most important image elements among visitors on arrival were “gambling city” and “unique architectural heritage”. Song and Witt (2006) mention “Macau has not been regarded as a traditional and popular destination by Western tourists”. A study by Breitung (2009) of visitor and resident images of Macau concentrates on the cultural aspects of image, excluding gambling from the prompted list of image elements. Mainland Chinese travellers perceive Macau as Asia’s Las Vegas, a view highly correlated with its gambling offerings. Macau is also well known for its culinary culture, heritage, and historical attractions (Hsu and Song, 2013). Destination image measurement take measure once in empirical survey studies to first, assess how tourists currently view a destination, second, define how the destination would like to be perceived by tourists, third, develop and implement marketing action to modify destination image, and fourth, check if the intended change in destination image has occurred (Dolnicar and Grün, 2013). Very few previous studies have considered the relationship between visitors’ images and those of residents and other stakeholders. Even fewer studies of image change have actually employed longitudinal research to measure the actual change in image among the target groups (Boo and Busser, 2006). The authors attempt to assess the comparative validity of these different measures of destination image and little guidance is available to researchers and data analysts on which measure should be preferred. As a result, this paper is to investigate the images of visitors, residents, and DMOs.

Stakeholders and tourism planning

Bryson and Crosby (1992) define a stakeholder as “any person, group, or organization that is affected by the causes or consequences of an issue” (p. 65). Donaldson and Preston (1995) state that the group or individual identified as a stakeholder must have a legitimate interest in the organization. Applying those definitions in the tourism context, the stakeholders include local businesses, employees, local government officials, competitors, entrepreneurs, tourists, activist groups, and residents (Freeman, 1984). Without stakeholder support in the destination, it is difficult to develop tourism in a sustainable manner (Andereck and Vogt, 2000; Andriotis, 2005).
Thus, it is necessary to understand the attitudes and insights of stakeholders for tourism planning and the management of sustainable tourism (Byrd et al., 2009). Furthermore, stakeholders can be divided into supply-side and demand-side stakeholders. Supply-side stakeholders include tourism-related businesses and government agencies, whereas on the demand side are primarily customers (Urde, 2003). Hankinson (2004) develops four categories of stakeholders: consumers (local people, employees of local organizations, and targeted visitors), primary services, secondary services, and media. In this regard, the demand-side stakeholders can be further related to residents and visitors. A successful branding strategy for a city or region is to examine the needs of internal stakeholders, such as local businesses, government, and residents (Kemp et al., 2011). The destination value images should be interpreted in the same way by both supply-side (DMOs) and demand-side stakeholders (residents and visitors).

Recent studies increase the emphasis on tourism planning involving multiple stakeholders (Palmer and Bejou, 1995). These stakeholders include residents, public authorities, and entrepreneurs. The stakeholder involvement allows the tourism planning process to include the formulation, implementation, and adaptation of planning decisions (Yuksel et al., 1999). Tourism planning can be ensured by stakeholder involvement, which is a key factor of tourism destination development (Gunn and Var, 2002; Healey, 1997). The stakeholders can collaborate to develop the same goals for the tourism industry (Jamal and Getz, 1996; Palmer and Bejou, 1995). By understanding the goals in tourism planning, the stakeholders will have better knowledge of the ways to improve their planning in the destinations to maximize their use of resources. The destinations can benefit not only from the narrow financial objectives of tourism operators, but also from the social objectives through the collaboration between the stakeholders from the public and private sectors. One of the key components of tourism planning is the notion that in satisfying the local needs, it may also be possible to satisfy the local needs of the tourists (Hall, 2000; Murphy, 1985). As such, it implies consideration with a particular focus on local stakeholders and tourism planning in the destinations. Local stakeholders are the suppliers in the destinations, such as tour operators, hotel owners/entrepreneurs, destination shareholders, landowners, and interest groups. It is essential to establish strategic planning by understanding those stakeholders in order to guide more sustainable tourism development for communities.

**Sustainable tourism development**

Sustainable tourism has become an increasingly popular field of research since the late 1980s. The United Nations World Tourism Organization (2001) has advised that sustainable tourism development should meet the needs of present tourists and host regions, while protecting and enhancing opportunities for the future. Four distinct stakeholder groups can be identified: the present tourists, the present host community, the future tourists, and the future host community. Accordingly, the Government players and the tourism industry in a destination need to agree about the importance of incorporating sustainable development principles into their planning and operations. It is necessary to develop cooperative and integrated control systems and provide for the involvement of stakeholders for planning processes to be less top-down and more inclusive.

However, in some destinations, stakeholders are only consulted minimally, and usually that takes place near the end of the process. However, cooperation alone will not foster commitment to sustainable development without the incentive of increased mutual benefits (Hall, 2000). Byrd (2007) suggests that DMOs must incorporate both the tangible and the intangible aspects of tourism for all the stakeholders to feel that their views have been taken into account. Without truly inclusive stakeholder involvement, the term sustainable development would just be a marketing slogan and could not be implemented. In order to achieve sustainable tourism development, more attention to applying aspects of stakeholder theory has been suggested by various authorities on the topic. Jamal and Getz (1995) suggest that the concept of collaborative thinking from stakeholder theory can be applied to tourism planning and management. This idea is based on the normative approach to stakeholder theory. The approach posits that the various groups can and should have a direct influence on managerial decision making (Jones, 1995). In addition, Donaldson and Preston (1995) have developed three aspects from stakeholder theory that are applicable here. One of the aspects is the concept of what or who is instrumental in a decision-making process, and what identifies the connections or lack of connection between stakeholder groups and the achievement of the organization or development’s objectives and
goals. This implies that consideration should be given to each stakeholder group without one being given priority over others (Sautter and Leisen, 1999). Importantly, it is necessary to understand the connection between stakeholders in more detail. Donaldson and Preston (1995) indicate that all stakeholders do not need to be involved equally in the decision-making process; however, all interests should be identified and understood. The history of the development of communication between tourism and heritage management stakeholder groups in a destination about tourism development will be telling in terms of how healthy such partnerships are in terms of managing heritage attractions sustainably (du Cros and McKercher, 2014). Therefore, the first step towards sustainable tourism development for a destination is the identification of stakeholders (Byrd, 2007) and then gaining an understanding of their concerns in tourism planning and development. All the identified stakeholders should be invited to take part in the planning process, before the theory can be applied effectively. However, it is impossible to involve all the stakeholders in the tourism development, so it is suggested to involve particular key players (Markwick, 2000).

Methodology

The images perceived by three stakeholder groups (DMO, visitors, and residents) are examined in this study in relation to possible commonalities and contrasts. The traditional strategies of analysing destination images look at assessing how tourists currently view a destination and defining how the DMOs would like the destination to be perceived by tourists (Dolnicar and Grün, 2013). However, García et al. (2012) suggest that DMOs should instead develop a two-stage strategy, focusing first on the stakeholders closest to the destination (residents) and second on visitors. This is an approach that is rarely applied in Asia. Gallarza et al. (2002) mention that the methodologies of empirical image studies divided into two blocks including qualitative techniques and other techniques. The first block encompasses techniques such as free elicitation and open-ended questions, focus groups, and in-depth interviews and experts’ discussions. The second group covers essentially content analysis. According to Choi et al. (2007), the understanding of a destination’s image representation has become more complex with the larger spectrum of information sources and channels and so such an approach would be worthwhile. Oppermann (2000) recommends using multiple disciplines and mixed methods in sustainable tourism research. As a result, two different methods were conducted in this study to gather data on destination images, please see Figure 1.

A survey questionnaire method was used to measure the images of visitors and local residents about Macau, while a content analysis approach was used to identify the key images projected by the MGTO from 2008 to 2012. Stakeholders’ opinions can be collected using methods such as questionnaires, telephone surveys, focus group discussions, and interviews (de Araujo and Bramwell, 1999). In this study, a survey was adopted in Stage 1. The ATLAS study by Richards and Akagawa (2005) was used as a basis to design the questionnaire as it contains many relevant questions related to destination imagery for cultural tourism and the results would be of interest to other researchers who have also used the questionnaire in relation to this and other issues internationally. Visitors to Macau were interviewed to examine their experiences of different types of tourism products. The visitors were asked about the main attractions they had visited in order to trace the links between tourism consumption and image. A total of 600 valid questionnaires
were collected (300 from visitors and 300 from residents). The visitors were approached using convenience sampling technique at one attraction while the residents were contacted through telephone interviews.

The content analysis was carried out in Stage 2. Content analysis is an approach to the analysis of documents and texts that seek to quantify content in terms of predetermined categories and in a systematic and replicable manner (Bryman, 2004). It is a research technique for the objective, systematic, and quantitative description of the manifest content of communication (Berelson, 1952). There are two general classes of content analysis in social science: qualitative and quantitative. Qualitative content analysis refers to non-statistical and exploratory methods that can be accessed only by the detailed investigation (Berg, 2001). Quantitative content analysis refers to methods that are capable of classifying many words of text into much fewer content categories that then can be counted for their occurrences and provide statistical inferences from text populations (Weber, 1990). It involves a systematic process of data collection and reduction that can be used in descriptive research to identify emergent themes from a huge data (Krippendorff, 2004). The official web site of the Macau Government Tourist Office (MGTO) (www.macautourism.gov.mo) was selected and only the messages under the directories of “Press Releases” from 2008 to 2012 were investigated. Macau’s present DMO is the MGTO, which is responsible under the Secretariat for Social Affairs and Culture for destination marketing, tourism planning and research, communication and external relations, licensing, tourism products, and events (Pacific Asia Travel Association (PATA), 2012). Hall (2000) mentions that press releases make reference to the images the DMOs would like to project at the government level. The rationale behind this sample selection was that the survey of visitors was conducted in 2010, and so the messages from two years before and two years after 2010 would be of relevance. Press releases serve as a direct means of communication between the DMO and the general public. Particularly, those press releases with the images that the DMO would like to project.

Using a face-to-face questionnaire survey and an analysis of press release reports, the study investigated the different images to reveal some surprising collaboration as well as conflicts in the common understanding of Macau’s destination image. The implantation of sustainable development of a destination is connected to the images of different stakeholders in the redevelopment of destinations’ images. Besides being a useful marketing tool, understanding the images of different stakeholders is an analytical tool of potential value to academics. Analysis of stakeholders’ views may provide a means of moving towards an understanding of sustainable tourism development. Because of the complexities of the sustainable tourism planning, it cannot just focus on one type of benefit, but aims to bring holistic benefits to the environment, society, and the economy (Dwyer, 2005; Lane, 2009). Such mix-method approaches and multiple perspectives may result in a better understanding and provide the comprehensive perspectives in the issues.

Findings: images from visitor and resident surveys and the DMO’s press releases

This section presents an overview of the main themes and images of Macau as analysed from the surveys of residents and visitors and the MGTO’s press releases. The primary aim of the visitor and resident surveys was to assess the image that residents and visitors have of Macau. Because the surveys were conducted in Macau, we could measure the image developed by residents and visitors.

Results of Stage 1 – images from residents and visitors

For the visitor survey, the sample surveyed for this study was reasonably evenly distributed by gender, with 47.7 per cent of female respondents and 52.3 per cent of male respondents. The respondents tended to be relatively young, with 77 per cent aged less than 35 years of age and 30 per cent being students. The majority of respondents had either a high school educational qualification (31.3 per cent) or a Bachelor’s degree (47.9 per cent). The respondents tended to be employed (68.3 per cent) and the most common occupational levels were clerical/administrative (22.3 per cent) or professional (16.7 per cent) positions. Looking at the data in more detail, they show that 53.7 per cent of the respondents were employees, followed by students (30.0 per cent) and self-employed (10.0 per cent). A relatively high proportion of respondents indicated that
their occupation was connected to culture (41.0 per cent). The income levels varied considerably according to visitor origin. Over 40 per cent of Mainland Chinese visitors had a monthly income of USD$1,000 or less, while 27.4 per cent earned between USD$1,001 and 2,000. For the Hong Kong visitors, 33.7 per cent earned between USD$3,001 and 4,000. Almost 50 per cent of the visitors (not including visitors from Hong Kong and Mainland China) earned between USD$2,001 and 4,000. Overall, 50 per cent of the respondents earned under US$2,000.

Of the respondents in resident survey, 57.3 per cent were female, while 42.7 per cent were male, perhaps reflecting the tendency for women to be at home during the day. The age profile of the respondents tended to be young; almost 56 per cent of the respondents were under the age of 40, while 33 per cent of the respondents were under the age of 25. Almost half of the respondents had completed junior high school and high school and around 24.7 per cent had completed a university education. This seems to conform to the general educational profile in Macau, as well as previous resident surveys. Due to the relatively young profile of the respondents, there were a high proportion of students among the respondents (26.7 per cent) and in total less than half the sample came from the working population. This distribution may relate to the female bias in the surveys. In terms of those respondents who were working, the largest groups were drawn from service and technical professional occupations. Relatively few respondents fell into the higher occupational categories, such as managerial or professional jobs. In total, almost 23.0 per cent said that their job was linked to tourism. This is not surprising given the high share of tourism in the economy. Far fewer respondents, 9.3 per cent, indicated that their occupation was linked to culture. In total, 32.3 per cent of the respondents were linked to either tourism or culture. The respondents with occupations connected to tourism tended to have lower occupational levels than the other respondents, and were mainly employed in service-level jobs. Table I highlighted the demographic profile of survey respondents. Also, the images of Macau among residents and visitors were measured by several questions. The results suggest that the visitors’ and residents’ images of Macau are similar. The details are as follows.

According to Table II, the most important induced information sources were guidebooks, Macau web sites, and travel agencies. Guidebooks tended to be less important prior to arrival than in
Macau itself. Visitors were also less likely to consult the information from DMOs before or during the trips. Visitors from Hong Kong were more likely to have visited Macau before and therefore drew much more often on personal experience. Information from friends and relatives was most likely to be used by Mainland Chinese visitors, whereas other visitors had consulted more web sites and guidebooks.

In terms of the type of city visitors associated with Macau, according to Table III, there was a clear preference for a “multicultural city”, followed by a “Portuguese city” and an “Asian city”. However, Hong Kong and other visitors were more likely prefer the image of Macau as a “Portuguese city”, whereas the visitors from Mainland China were more likely to see Macau as a “multicultural city”. Looking at the data in detail, 16.1 per cent of the visitors considered that Macau is a historic city, followed by a multicultural city (14.3 per cent) and a gastronomic city (12.0 per cent). Interestingly, the residents in Macau considered Macau as a multicultural city (35.7 per cent), followed by a Chinese city (14.0 per cent) and an Asian city (13.7 per cent). Since most of the populations in Macau are Chinese, it seems that the Chinese were more likely to consider Macau as a “multicultural city”. It is clear that the residents and visitors identified Macau as a city related to culture and heritage. That is, it is primarily a historic and multicultural city the dominant culture of which is not perceived in any one way by either residents or visitors.

Table IV provides positive support that residents and visitors identified Macau with culture and heritage. The identification of cultural elements varied by visitor origin and residents. Although Portuguese architecture was the aspect most commonly identified by all the groups, visitors from Hong Kong and Mainland China were more likely to mention Portuguese architecture and Macanese cuisine. This probably relates to some of the most noticeable differences between Macau as a former Portuguese colony and the British colonial heritage of Hong Kong. For other visitors, the Cantonese language did not feature at all as an aspect of the Macau image. In contrast, they were more likely to notice Chinese architecture. The general pattern that emerges is that Macau has a specific Portuguese heritage for Hong Kong, a more general Western culture for visitors from Mainland China, and a more Chinese image for other visitors.

Table III  Image element

<table>
<thead>
<tr>
<th>Elements</th>
<th>Hong Kong Frequency</th>
<th>Mainland China Frequency</th>
<th>Overseas Frequency</th>
<th>All Visitors Frequency</th>
<th>Resident Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portuguese architecture</td>
<td>59</td>
<td>86</td>
<td>29</td>
<td>174</td>
<td>240</td>
</tr>
<tr>
<td>Macanese cuisine</td>
<td>52</td>
<td>78</td>
<td>18</td>
<td>148</td>
<td>203</td>
</tr>
<tr>
<td>Portuguese language</td>
<td>29</td>
<td>33</td>
<td>13</td>
<td>75</td>
<td>169</td>
</tr>
<tr>
<td>Catholic religion</td>
<td>23</td>
<td>36</td>
<td>15</td>
<td>74</td>
<td>167</td>
</tr>
<tr>
<td>Museums</td>
<td>21</td>
<td>39</td>
<td>13</td>
<td>73</td>
<td>183</td>
</tr>
<tr>
<td>Cantonese language</td>
<td>10</td>
<td>41</td>
<td>10</td>
<td>61</td>
<td>194</td>
</tr>
<tr>
<td>Many cultural activities</td>
<td>9</td>
<td>33</td>
<td>6</td>
<td>48</td>
<td>169</td>
</tr>
<tr>
<td>Monuments</td>
<td>11</td>
<td>16</td>
<td>4</td>
<td>31</td>
<td>335</td>
</tr>
<tr>
<td>Chinese architecture</td>
<td>7</td>
<td>11</td>
<td>5</td>
<td>23</td>
<td>155</td>
</tr>
<tr>
<td>Buddhism/Taoism</td>
<td>1</td>
<td>7</td>
<td>5</td>
<td>13</td>
<td>130</td>
</tr>
</tbody>
</table>

Table IV  The first word/phrase that come to residents and visitors mind about Macau

<table>
<thead>
<tr>
<th>Words/Phrases</th>
<th>Hong Kong Frequency</th>
<th>Mainland China Frequency</th>
<th>Overseas Frequency</th>
<th>Resident Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casino/gambling</td>
<td>37</td>
<td>36</td>
<td>19</td>
<td>96</td>
</tr>
<tr>
<td>Prosperity/flourishing</td>
<td>1</td>
<td>11</td>
<td>0</td>
<td>16</td>
</tr>
<tr>
<td>Cuisine</td>
<td>7</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Gaming destination/gaming city</td>
<td>2</td>
<td>8</td>
<td>1</td>
<td>16</td>
</tr>
<tr>
<td>Ruins of St Paul’s</td>
<td>1</td>
<td>9</td>
<td>1</td>
<td>4</td>
</tr>
</tbody>
</table>
According to Table V, the identification of unique image elements indicated that the image of Macau as a gambling city came across very strongly. It is clear that the gaming industry is not just something that visitors associate strongly with Macau, but the same applies to local residents. They also see gaming in Macau as being distinctive. The other aspects of Macau that visitors see as unique are related to its cultural attractions, including the Ruins of St Paul’s and the architectural style. Interestingly, many respondents saw the cuisine in Macau as unique. In terms of first associations, in general, visitors considered an image of Macau as a gambling destination. However, visitors from Mainland China were much more likely to have an image of Macau as prosperous and flourishing, while the Macanese cuisine is important for visitors from Hong Kong.

Results of Stage 2 – press releases from the MGTO

Stage 2 adopted a qualitative approach to collect the data from press releases on the official tourist web site and content analysis for analysis. The purpose was to understand the governmental rationale behind the destination images of Macau.

Table VI displays and compares the phrases related to the images of Macau that are shown on the MGTO official web site. “MICE destination”, “leisure destination”, and “world centre of tourism and leisure” are the most frequently used words across five years. Interestingly, the Government showed many images to the public before 2010, but since 2010 it has focused on the image of a “world centre of tourism and leisure”. Macau is projected as an urban destination for MICE tourism (meetings, incentives, conferences, and exhibitions). In fact, the MGTO provides promotional assistance and facilitation in liaison with other government authorities. However,

| Table V The frequency of images projected by the Macau Government Tourist Office |
|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| 2008              | 2009              | 2010              | 2011              | 2012              |
| Multicultural destination | MICE destination | Leisure destination | World Centre of Tourism and Leisure | World Centre of Tourism and Leisure |
| “Must-see” destination | Leisure destination | MICE destination | 4 | 3 |
| East meets west Leisure destination | Business destination | Multi-destination | 3 | Quality Destination |
| Leisure destination | International destination | 1 | Preferred destination | 2 |
| Major tourist destination | MICE destination | Business destination | 1 | Incentive destination |
| Short-haul destination | Leisure destination | 3 | International destination |
| Quality travel practice | Business destination | 1 | Leisure destination |
| Multi-destination travel | 1 | MICE destination | 1 |
| Business travel | 1 | leisure destination | 3 |
| MICE destination | 1 | vacation destination | 1 |
| vacation destination | 1 | Vibrant destination | 1 |
| World-class travel destination | 1 | World-class travel destination | 1 |

| Table VI The slogans used by the Macau Tourism Tourist Office |
|------------------|------------------|------------------|------------------|------------------|
| 2008             | 2009             | 2010             | 2011             | 2012             |
| Experience Macau | Experience Macau | Experience Macau | Experience Macau | Experience Macau |
| Five senses: see, taste, touch, feel and hear | Five senses: see, taste, touch, feel and hear | Five senses: see, taste, touch, feel and hear | Experience Macau |
| Enjoy Macau | Macau: a world of difference, the difference is Macau | Macau: a world of difference, the difference is Macau | Enjoy Macau |
| 1 | 2 | 1 | Enjoy Macau |
| 1 | 2 | Touching moments experiences Macau | 1 |
from the news in the section on “Press Releases” from 2008 to 2010, it is apparent that the Government, through the MGTO, has already projected more than ten specific brand images to the public for Macau.

Table VI shows that destination slogans can offer an opportunity to add more meaning to that which can be achieved by the brand name or symbol (Aaker, 1991). A slogan is a short phrase that communicates descriptive or persuasive information about a brand (Keller, 2000). It is suggested that too many destination slogans have been less than memorable, so the best practice in destination promotion has been limited to a few simple slogans (Pike, 2008). According to Table II, the MGTO is attempting to highlight the slogan “Experience Macau”. Before 2010, the visitors could experience Macau through five senses: “See”, “Taste”, “Touch”, “Feel”, and “Hear”. After 2010, visitors can experience Macau in “Enchanting”, “Fascinating”, “Surprising”, and “Tasteful” realms and encounters.

Destination images should encapsulate residents’ sense of place and the residents need to be aware of new tourism-related products and infrastructure developments as early as possible in the process (Pike, 2008). However, the MGTO did not initiate such measures in any of the development processes for destination image branding and seems to have completely ignored the World Heritage inscription of Macau after 2006 – the year in which it appeared heavily in local and overseas marketing efforts. Furthermore, the MGTO seldom mentions the attractions related to casinos and gaming activities on the official web site, which implies that the Government has been trying to downplay the image of a gaming destination. The MGTO is attempting to show the attractions of the “Historic Centre of Macau”, “World Heritage”, and “Ruins of St. Paul’s” to the public and highlight that Macau has many cultural heritage attractions. Those three attractions are the most-mentioned attractions on the web site. The Government promotes the cultural heritage destinations as well as leisure destination. On the other hand, the cultural heritage attractions in Macau are mentioned less after 2010 due to the number of press releases decreasing after 2010 (2008: 61 press releases, 2009: 67 press releases, 2010: 49 press releases, 2011: 47 press releases, 2012: 57 press releases). This implies the existence of a disconnection between MGTO, resident and visitor images. The importance of understanding the difference between the projected and the perceived image is crucial. Additionally, when these images are inconsistent with the projected and perceived images of Macau, it could leave the way open for visitors to express or build a negative image of the destination.

Discussions and implications

This study’s findings make a contribution to understanding existing destination image from the theoretical, methodological, and managerial standpoints. Theoretically, this study opens up new insights into destination development beyond that indicated by Choi et al. (2007) in that it is crucial to understand whether the images of the government, visitors, and residents are connected. This research highlights the multiplicity of images and producers of images in Macau. Jamal and Stronza (2009) postulate that destination development often comprises of multiple stakeholders who may hold diverse views on development and no individual stakeholder can fully control tourism planning. They also pinpoint that it is a self-limiting strategy to collect the opinions of stakeholders via a one-way consultation process that cannot provide fuller information for public sector planners (de Araujo and Bramwell, 1999). The Government, through the MGTO’s promotion over the last few years, has tried to build up Macau as a multicultural destination, a MICE destination, and a leisure destination. The results of this study show that the visitors and residents surveyed tended to agree with each other most closely that Macau is a multicultural destination foremost. However, they differed concerning what they perceived this multiculturalism to be. There is a disconnection in that both residents and visitors perceive a juxtaposition of the Portuguese and Macanese cultures, while the MGTO’s promotion instead considers that multiculturalism is present only in the juxtaposition of aspects of the Portuguese and Chinese cultures. Such findings add to an earlier investigation into the projection of Macau’s images (Ong and du Cros, 2012a) in which Portuguese and Chinese elements and their juxtaposition were found to be privileged over more local ones. Further research is needed to discover whether this is the result of Macau’s particular postcolonial trajectory or the way destination images are developed by its DMO.
The findings of this study also concur partly with Timur and Getz’s (2008) assertion that a DMO, attraction stakeholders, and hotels have a particularly crucial role to play in destination development. According to the findings, most residents and visitor’s image of Macau converge on the multicultural city that the MGTO is promoting, the MGTO’s attempts to downplay casinos. Chinese travel magazines present a multifaceted destination image to their readers with Macau focusing on history and heritage, places and attractions, gambling, cuisine and good, and hotels (Hsu and Song, 2013). However, images of casinos still rank highly in the minds of residents and visitors. It appears that the destination image is dominated by casinos and gaming and therefore there is a need to develop a diversified image of Macau (PATA, 2012). In addition to the lack of agreement between the MGTO and the residents and visitors, as highlighted in various instances in this research, this could be a result of a lack of buy-in from hotels and travel companies regarding the images the MGTO projects as well. In the existing marketing literature, a DMO, such as the MGTO, requires an effective communication medium to project destination images and then monitor the stakeholders’ (residents and visitors) perceptions to gauge whether they match in any way. In fact, the positioning in Macau is about creating an image of Macau in the minds of tourists that the destination wants to attract (PATA, 2012). Kapferer (1997) argues that the sender creates brand identity, whereas the receiver perceives the image. The brand identity and brand image are critical components for a successful destination. Cai (2002) asserts that a destination needs to acquire the information to build the desired image that is consistent with the brand identity of the destination. DMOs should be considered as the sender presenting clear and unambiguous messages to the receiver (residents and visitors) about destination image. In this case, the findings from this research highlight that in practice, this form of clarity and consistency in sending messages about brand identity, as part of destination imaging, is not easy to achieve. Macau’s MGTO appears to have difficulties in directing the residents and visitors to consume and accept all of its preferred images.

Methodologically, this study has attempted to illustrate that a combination of two methodologies is productive to measure destination images. Echtner and Ritchie (1993) suggest that a combination of structured and unstructured methodologies should be used to measure destination image. The authors combined survey (structured) and content analysis (unstructured) methodologies in this study. The responses to image questions from the visitors’ and residents’ survey provide the more general characteristics of their destination images, while investigating the press releases from the MGTO can facilitate an understanding of the images projected by DMOs. This study shows that this approach is an adequate means to gain a better understanding of the images between DMOs, visitors, and local residents. This methodological approach is suitable for understanding the local tourism stakeholders’ challenges regarding images. Tourism practitioners can take this knowledge into consideration in their future practice. Monitoring the effectiveness of the images is a critical role in tourism development. Monitoring the images will ensure that the images are continually evolved and enriched in the destinations. The more complete measurement of destination image provides information useful for tourism planning and sustainable development in the destination. Importantly, this approach can provide affirmation for the importance of understanding the residents’ images of a destination. This study illustrates the value of the application of taking two approaches to stakeholder assessment to examine the images in sustainable development. Based on the concurrent design strategy, quantitative and qualitative data were used simultaneously to explain the images projected of Macau. By providing an alternative way to increase the understanding of destination images, tourism planning is beyond simply asking either DMOs or visitors for their images and a full understanding of the host-guest relationships is likely to be achieved. Furthermore, the local residents could be encouraged to become involved in tourism planning because their opinions are considered in the planning process. The differences in images between DMOs, visitors, and local residents suggest that it may advisable to explore the destination’s uniqueness and images as the first step in sustainable development. Lu and Nepal (2009) mention that the methods used in tourism studies are largely borrowed from other disciplines. Research on sustainable tourism is still very descriptive in content as well as analysis, which may limit the choices of research methods. Nunkoo et al. (2013) suggest that adopting mixed-method approaches is likely to improve the rigour of tourism studies and provide new perspectives for sustainable tourism research. Importantly, Oppermann (2000) argues that tourism researchers should engage in new types of
research that systematically add knowledge to the file, rather than conducting further place-specific research of limited value. As a result, this study may also be useful in improving future research methodologies on this topic and identifying the most appropriate sustainable tourism research.

From a managerial perspective, an important finding and implication is that there are many areas of convergence in the image of Macau held by visitors, residents, and stakeholders. Most importantly, the idea of Macau as a city with a dominant gaming industry is firmly fixed in the minds of most residents and visitors. Macau is renowned for its gaming activities and is often referred to as the “Las Vegas of the East”. A large amount of government revenue is collected from the casinos and other gaming activities. The tourism industry is the major source of government income. Based on the data, “casinos and gambling” clearly dominate the “top of mind” impressions of residents of Macau. Furthermore, most residents and visitors associate Macau’s images with “gaming” and a “gaming destination”, with which it is impossible for the cultural appeal to compete. The gaming industry is still the dominant industry in Macau.

Therefore, it implies that there is still room for improvement in the development of other types of tourism (Ong and du Cros, 2012b). Due to this overdependence on the gaming industry, efforts to develop an attractive broad-based tourism product apart from the gaming industry have been a challenge. Macau’s tourism industry therefore continues to move slowly toward diversification, in particular by showing an increased focus on cultural tourism in the hope of making Macau a unique world-class tourist destination.

Fortunately, both residents and visitors also recognize the essential blend of peacefulness and liveliness that characterizes the atmosphere of the city. There is a relative level of agreement on the unprompted image of Macau as a historic city with lots of tourism, a comfortable place in spite of its small size and crowded population. Residents have a stronger association with the specific landmarks of Macau, such as St Paul’s Ruins and the Guia Lighthouse. For visitors, the architecture is far less differentiated, and they tend to view the architecture of the historic city in a more holistic way. Residents are also much more aware of the popular culture of the city than visitors. In addition, visitors seem to be more positive about Macau than many of its residents, being more likely to characterize it as a friendly and relaxed place than the residents. Visitors are also more likely to emphasize the mood of Macau as relaxed and friendly, and also seem to be more aware of the cultural mix. Based on the data from Stage 2, the Macau Government is trying to present Macau as a “leisure destination”; however, the results show mixed support for the images from visitors’ and residents’ perceptions in the surveys.

Currently, the Government’s visions and goals regarding the promotion of images of Macau as a “leisure destination” has remained unclear. Messages from the Government before 2010 are cluttered as there are too many images it seeks to express including “leisure destination”, “MICE destination”, and “world-class travel destination”. There appears little determination from the Government to achieve more with these destination images than purely cultural-based ones or those aligned with it being multicultural or historic city (the key image found of Macau in this study). It is necessary to focus on one or two images, identify visitors’ and residents’ views about these images and further motivate them to become involved and to participate in tourism planning. The variety of different agents involved in the creation of “induced” or tourism promotional messages about Macau, as well as the “organic” or non-tourism information sources that may affect the image (such as the media), make it important to understand the relationships within the image formation system. The role of a DMO becomes a challenge when it needs to create consistent brand associations in alignment with the views of all stakeholders and encourage continuity in their attitudes and actions to tourists these images attract. These three stakeholder groups should also strengthen their collaboration to minimize the discrepancies in destination images. Although visitors and local residents express similar images, they are involved very little in the tourism planning process and even the final planning arrangement in Macau. Various images co-exist with the conflicts, and such discrepancies can only be resolved through a process of collaboration, negotiation, and even tourism planning partnerships. To build a better destination, local governments need to involve local residents and other stakeholder groups in the planning process (Choi and Murray, 2010). If the images among these three stakeholder groups are connected and consistent, such harmony can show a commonality of purpose that
can enhance future image appropriation and development through equitable planning and development. The recognition of the different interests of the three tourism stakeholders is considered a key factor differentiating sustainable tourism and maintainable tourism (Hardy et al., 2002). Tourism in a destination may continue to operate, but not sustainably, when the stakeholder interests are not fully recognized (Lu and Nepal, 2009). Sustainable tourism has traditionally placed greater focus on aspects related to the economic and environment development and more attention should be given to community involvement.

Sustainability issues are increasingly to take into account in the destination planning and development, however, the destinations are being marketed and promoted in a way that is different to local people’s perspectives. The tourism development cannot be successful. DMOs have to compare the effects of the different images projected from these three groups including DMOs, visitors, and local residents and then analyse if the images is connected or unconnected. It is crucial to identify whether rebuilding the images and which stakeholders work needs to be enhanced. Two-stage strategy in images is possible but DMOs should establish a clear image for each stakeholder first, and then investigate images of visitors and local residents. The possible differences in images could be diminished and ensure the images of these three groups are connected. By understanding the different images in the stakeholders, the tourism practitioners have to find the tourism planning strategies that is accepted by stakeholders. The conflicts may be eliminated or at least minimized to the dissatisfactory levels made by the interested stakeholders. If the images are identified, the sustainable forms of tourism are to be easier developed, then it clearly becomes essential to develop more sustainable forms of tourist product that are supplied to the visitors and not sacrifice the living quality of local residents.

In the case of Macau, the government has tried during the period studied to inject the images of MICE and leisure images in the Macau without consideration of visitors and local residents whether they have received those images. It may imply that the images are projecting from the government that is different to what the government is doing. The various stakeholder groups must be aligned with respect to relational orientations. While visions and perspectives of stakeholders of tourism places are often diverse and even contradictory (Ong et al., 2014; Wong, 2013), tourism planners should be more sensitive to the images of those stakeholders in the process. Stakeholder theory with a two-stage strategy can provide a conceptual framework of enhancing sustainability in the tourism destinations. If tourism planners proactively consider the images of all other stakeholders, at least for the three key stakeholders, the odds for sustainable development is enhanced as discrepancies in destination images could be minimized and that the synergy from a harmonious appropriation and development of tourism resources maximized.

Conclusions and limitations

The Macau case offers a useful research direction in for studies of long-term tourism planning as well as identifying the justification for the co-creation of destination images for sustainability by postulating a more inclusive approach to destination marketing. Both quantitatively measurable and qualitative items should be included in understanding the images and the messages behind them. The key lesson from Macau’s case is in acknowledging the tourism planning role of the host community. Such an approach is seldom used to study tourism stakeholders’ opinions of images promoted, but it is still considered promising as it allows for a rich and detailed examination of the images. This study can provide practical and cohesive results to guard against such eventualities. As with other research, this study is not without its limitations. The authors understand that one of these limitations relates to the underlying sample of study participants. The data collection was conducted over the summer of 2010. Visitors’ characteristics and images of Macau may vary seasonally. Thus, further study can be conducted in different seasons in order to investigate the variations and whether they relate to source markets as well. Since the leading market for Macau is Mainland China, followed by Hong Kong and Taiwan, the present study is limited to tourists living in East Asia. A cross-cultural investigation of destination branding in relation to perceptions of multiculturalism and social change in Macau could be examined further in future research. Future studies should include a larger sample size with greater geographic representation of various regions. In addition, undertaking qualitative research to gain
a more in-depth understanding of the destination images from the points of view of residents and visitors would also benefit Macau’s DMO and an academic understanding of the topic. There is still a need in future research to address the views and constraints of Macau for the implementation of sustainable tourism.

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Further reading


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