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## Las Vegas Versus Macao as Diversified Travel Destinations

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# Las Vegas Versus Macao as Diversified Travel Destinations

## **Cover Page Footnote**

The authors are grateful to Prof. Patrick Tierney, and the anonymous reviewers for their constructive comments on an earlier version of this paper.

## **Las Vegas Versus Macao as Diversified Travel Destinations**

### **Introduction**

Planned events, such as festivals, concerts, trade shows, conventions, and sporting events, have emerged as major factors attracting people to a destination. Attending such events can help tourists fulfill their intrinsic and extrinsic travel needs (Getz, 2008). Furthermore, event tourism has been acknowledged as helping destinations gain a better tourism image, become more competitive, and bring a stream of economic opportunities such as business development and job creation (Boo and Busser, 2006; Getz, 2007). These benefits coupled with a higher yield generated from event tourists (Jago, 2003) have fostered a greater need to understand the linkage between destinations and event tourism. Yet questions remain as to the role of destination attributes in attracting event tourists.

Mature travel destinations like Las Vegas have already developed a prestigious reputation in hosting various kinds of events (Chacko and Feich, 2000). These destinations have well-developed event and tourism infrastructures that could host virtually any international event. Developing travel destinations, on the other hand, are less competitive and therefore have been trying to entice event tourists through other offerings, such as leisure and nightlife entertainment, lower cost of travel and lower event admission fees, and other destination-specific tourism products (Crouch and Ritchie, 1998; Getz, 2007). Although these destination attributes have been widely acknowledged as travel incentives and play a central role in destination selection (Chacko and Fenich, 2000; Comas and Moscardo, 2005; DiPietro et al., 2008; Fenich, 2001; Oppermann and Chon, 1997), it is still unclear how these attributes are related to tourism destination development. This literature void is addressed in the current research in the context of the developing travel destination of Macao, China.

The purpose of this paper is to discuss how events and festivals can diversify tourism via a comparison of Las Vegas and Macao. Las Vegas, which is regarded as one of the top gaming cities in the world, has many different types of entertainment and recreation, including numerous festivals and events. In 2006 Macao surpassed Las Vegas as the top gambling destination in the world (Associated Press, 2013A). However, Macao has been striving to diversify its tourism in face of the strong challenges posed by neighboring tourism jurisdictions, such as Singapore, the Philippines, South Korea, and Taiwan. In fact, Singapore, Japan, Hong Kong, Korea, Taiwan, and Thailand are all ranked ahead of China (Macao is included with China) in

the rankings of Travel and Tourism Competitiveness for Asian countries (World Economic Forum, 2013). The future of Macao depends on its attractiveness to visitors because competitors' gaming facilities are going to flourish in the coming years. Therefore, Macao's events and festivals need to grow in order to make itself more attractive as a diversified and complete tourism destination. The second section of this paper contains the literature review, followed by the section on methodology, then a section on the findings of the study. The next section is a discussion of the findings, and the paper ends with a section on conclusions.

### **Literature Review**

The extant literature acknowledges that tourist travel motivation is often pulled by destination attributes, including cost of travel (Bieger and Laesser, 2002), nightlife entertainment (Hsieh and Chang, 2006), casino gaming (Lee et al., 2006), food offerings (Rittichainuwat et al., 2008), accessibility (Hallab et al., 2006), and cultural heritage (Poria et al., 2006). These destination-specific offerings may serve as the primary or complementary factors that influence tourists' travel decisions. Event studies have also revealed that destination attributes play a central role in event participation and site selection (Crouch and Ritchie, 1998). These factors include cost of travel, hotel accommodations, dining options, culture, sightseeing, entertainment, and other destination attractions (Breiter and Milman, 2006; Chacko and Fenich, 2000; Comas and Moscardo, 2005; Oppermann and Chon, 1997).

The literature commonly suggests that consumer values are created based upon consumers' perceptions of cost, convenience, and service quality. Superior value propositions drive customer satisfaction and loyalty (Rust et al., 2004). Like regular consumers, event tourists are constantly seeking values, in the cost of the trip and activities, service quality, and geographic convenience, as incentives to help them make better travel decisions (Comas and Moscardo, 2005; Fenich, 2001). In addition, event tourists often engage with multiple leisure attractions during their trip. Casino gambling, sightseeing, dining, and nightlife entertainment have been documented as pull factors that help tourists to fulfill multiple travel needs (Fenich, 2001; McCartney, 2008). Therefore, it is reasonable to believe that destination-specific attributes could serve as complementary or even principal factors of event tourism. This research attempts to explore how events can help tourism destinations.

### What are events?

Janiskee (1980: 97) explained that festivals and events can be understood as "formal periods or programs of pleasurable activities, entertainment, or events having a festive

character and publicly celebrating some concept, happening or fact". The festive and public celebratory characteristics noted in this definition are important because festivals and events have long existed as significant cultural practices devised as forms of public display, collective celebration and civic ritual. In fact, according to Turner (1982: 11) people in all cultures recognize the need to set aside certain times and spaces for communal creativity and celebration. These practices were often allied to the rhythms of agrarian society (Rolfe, 1992) centuries ago. There were always religious underpinnings, as in many of the festivals that Fox Gotham (2005) reminds us existed in the Middle Ages. Researchers consistently point to the fact that throughout these earlier periods, festivals and events "encapsulate identity, in terms of the nation state, a sense of place, and the personal and heterogeneous identities of a people." (Matheson 2005: 224)

Historical research demonstrates how festival and events have a long history of acting as tourist attractions and of effecting the reproduction of places as tourism destinations. Gold and Gold (2005: 268) describe how the recognition of Greenwich as the fulcrum of the earth's time zones in 1884 inspired the hosting of a year long festival intended to boost international tourism to the city. Adams (1986) discusses how, as long ago as 1859, the Handel Centenary Festival held in London's Crystal Palace was marketed as a tourist attraction distributing 50,000 prospectuses in the European offices of the railway companies serving the Crystal Palace. Simultaneously, these transient, albeit often recurring, phenomena acted as an important means of collective identification for the communities hosting the events.

Festivals and events engender local continuity and constitute opportunities for asserting, reinforcing, reproducing and sometimes contesting prevailing social norms, cultural values and beliefs. Falassi (1987: 3) argued that festivals "renew periodically the life stream of a community and give sanctions to its institutions". In a similar vein, Bonnemaïson (1990) argued that what the literature terms the "hallmark event" (see below for definition) functions like a monument, supporting and reinforcing the image of established power, whether religious or secular. Festivals and events thus have a long historical trajectory, and embody the traditions of various pasts. They have flourished again in contemporary society, following a decline in the mid-20th century (Boissevain 1992). Their recent proliferation is noted by many researchers (e.g. Rolfe, 1992; Prentice and Andersen, 2003; Gursoy et al., 2004; Quinn, 2005) and is allied to their tourism potential. A set of demand-driven factors underpin their growth, including socialization needs, the growth of serious leisure (Prentice and Andersen 2003) and the move towards the consumption of experiences (Getz, 2008).

A key driver for the growth and reinvention of festivals and events internationally has been their potential to deliver a series of development outcomes in terms of economic restructuring and revitalization, destination repositioning, and tourism revenue generation (good items for evaluating the “success” of festivals and events). For instance, Schuster (2001) has argued that festivals and events staged as urban ephemera or urban spectacle yield economic benefits by raising the profile of places, their products and institutions and attracting flows of tourists and capital. For many western cities, a key motivation in developing festival and event strategies has been to recover from long-term economic decline. Festivals and events have been part of a wider range of new “cultural strategies” (Fox Gotham 2005) used to regenerate and orient post-production economies towards consumption (Zukin 1995), where leisure, entertainment and tourism underpin an “experience economy” (Pine and Gilmour 1999). Meanwhile, for these cities, as well as for those trying to get onto the global stage for the first time, festivals and events form part of place-marketing strategies, fuelled by an ideology of globalization, localization and competition among cities. Shin (2004), for instance, presents the case of the Gwangju Biennale Festival as being representative of recent cultural festivals in South Korea, where the image of a “city of art” was one of the standardized images developed by local governments to reshape the images of several South Korean cities. As in the past, by entailing public display and festive celebration, festivals and events create interest and attract attention as they invigorate and enliven places.

Festivals and events are seen to extend the tourist season, raise market awareness and position or reposition destinations, encourage investments, generate revenue and boost the local economy (Weber and Ali-Knight, 2012). Essex and Chalkey (1998) argue that major events produce an urban spectacle enabling cities to “express their personality, enhance their status and advertise their position on a global stage”. Special events can make a place come alive through the use of sensory stimuli and the creation of an appealing atmosphere (Getz, 2007). Consequently, events are designed to help extend the life cycle of the product through the encouragement of repeat visitation. The problem with this approach though is that images are often taken out of context and become both mainstream and standardized, projecting an image similar to other cities. It consequently leads to the creation of placeless generic festival and event forms to attract tourism audiences and generate often-inflated economic returns (Robinson et al., 2004).

For this paper it is important to note that there is a second and broader approach to

how a special event can be defined. Getz (1997) and other special event authorities typically consider a special event to be a one-time or infrequently occurring event. However, Getz (1997) also points out that, a special event is simply an opportunity for a leisure, social, or cultural experience that is outside the normal range of choices or beyond everyday expectations of customers. “Special Event Guru” Dave Matthews (2007) gives the example of a family going on a vacation to Disneyland for two days, “They consider the holiday to be a special event. However, for the organizers and participants of the daily parade at Disneyland it is merely a job ... thus making it a daily event or more accurately an attraction.”

This broader definition of special events is very important for this paper, because many tourists are drawn to a destination by shows, night club activities, amusement rides, and other leisure events that are offered by business organizers every day. However, to these tourists, these events and attractions can have great influence or “pull” in their decision to visit the destination, similar to the pull created by a major event that is offered just once a year. With this perspective we can see the tremendous variety of “event” opportunities offered in destinations such as Las Vegas, and to a lesser degree, Macao.

#### Context of Macao and Las Vegas

Las Vegas is in the middle of the dry Mojave Desert, and Macao is on the humid Pearl River Delta. Their geographic locations have not only influenced their creations but also their historic evolutions. Downtown Las Vegas is centered around Fremont Street, and Macao is centered around the former Leal Senado square. The Las Vegas valley’s 500 square miles of desert flatland that is enriched by mountain ranges allowed the city’s sprawl to develop easily. On the other hand, Macao’s confined territory, which until recently was composed mainly of a peninsula, and two islands in a small area of about 11.3 square miles, encouraged the administration to develop landfill projects, which have reclaimed land for real estate purposes. While Macao is one of the densest urban centers in the world, Las Vegas has low-density, grid-based suburban development because of the availability of land (Huber and Stern, 2008; Nasser, 2011). These two cities have about the same populations of 500,000, but the Las Vegas metropolitan area (i.e., Clark County) has on the order of two million people (Nasser, 2011).

In terms of transportation, both urban areas are served by international airports and a decent road infrastructure. In the case of Macao, there are also water links to neighboring Hong Kong and Zhuhai (Balsas, 2000). Airports have been critical to the

growth of these two territories. McCarran International Airport has had to develop expansion plans to accommodate the more than twenty million air travelers who come to Las Vegas as their destination (Ritter, 2012). Once there, visitors usually take mass transportation, rent a car, or walk.

In the 1960's, 70's and 80's Las Vegas grew to become known as an adult-oriented playground of gaming, shows, and many types of nightlife. The city's tolerance for adult entertainment earned it the title "Sin City". By the early 1990's several family friendly hotels opened, plus a water theme park, some family-oriented dinner theaters, and children's programs at several resorts. However, by the early 2000's, the water park closed as did the children's programs at two major hotels. In 2003 the Las Vegas Convention and Visitors Authority released its famous series of advertisements with the theme "What happens in Vegas, stays in Vegas". This implied that adults could come to Las Vegas, do whatever they want that is legal, and nobody would tell the folks back home. In 2005 other advertising slogans were developed, but by 2007 visitor volume started to drop with the start of a major recession. In 2009 the old "What happens here" marketing themes were brought back, with some adjustment in 2010 for the post-recession consumer (Audi, 2009; Velotta, 2010).

The most well-known casinos and hotels in Las Vegas are located on the Las Vegas Boulevard, also known as "The Strip" (e.g., the Venetian, the MGM Grand, New York-New York, the Bellagio, and Wynn) as well as in the downtown area. Macao's newest casinos are primarily located in the Cotai area, a strip of land that connects the islands of Taipa and Coloane, and in a newly assembled landfill area on the peninsula called NAPE. Whereas the casinos in Las Vegas are an integral part of the city's history, the casinos in Macao go back only to 1962, with the launching of the Sociedade de Turismo e Diversões de Macau (STDM). Although casinos were important to the economy of Macao during the Portuguese administration (Pinho, 1987), the territory saw a huge surge of new casinos after the 1999 transfer to the Chinese administration (McCartney, 2006). This primarily occurred because the casino monopoly expired in 2001, and the new administration granted gambling licenses to foreign operators.

Las Vegas celebrated its 100-year anniversary in 2005 (Moehring and Green, 2005), whereas Macao was initially settled in 1557 and has experienced more than four centuries of urbanization (Pina-Cabral, 2002; Porter, 1996). Most of Macao's local built heritage and Portuguese colonial patrimony have been preserved. In 2005, the UNESCO's world heritage classification was attributed to part of the patrimony in the



city center. These celebrations, together with the new gaming developments, have boosted tourism activity (Tang and Sheng, 2009; Wan and Li, 2011). In Macao, the number of visitors increased from 11.5 million in 2002 to more than 28 million in 2012, whereas Las Vegas has grown from 35.1 million in 2002 to about 40 million tourists a year now (DSEC, 2013; Las Vegas Convention and Visitors Authority, 2014).

Both places have a great diversity of replicated iconic structures. In Las Vegas, these structures represent many different cultures (i.e., French, Italian, and Egyptian). In Las Vegas, different architectural styles, heights, colours and juxtapositions, co-exist in close proximity, each building being more eclectic than the one next to it (Obrist and Koolhaas, 2001). Although it was perhaps not Las Vegas' initial goal, the spontaneous outcome of such a huge concentration of entertainment venues that represent very distinct cultures provides the almost unmatched opportunity to experience a multiplicity of venues within a short reach and without having to make multiple trips to distant places around the globe. Las Vegas offers an affordable alternative to world travel, which will likely satisfy and even thrill visitors to Las Vegas' hyper-real consumption and entertainment sites.

In Macao, despite its emphasis on Italian culture with the Venetian casino, many of the other developments incorporate bits and pieces of the territory's own Macanese and Portuguese colonial influences, such as in the Praça Central of the MGM Grand and the Ponte 16 casinos.

Recent developments in Las Vegas show continuing efforts to diversify its tourism. Two new water parks are scheduled to open in 2013 along with two 500 ft. tall Ferris wheels. The Asian-themed Resorts World complex of hotels and casinos will have a replica of the Great Wall of China plus a panda preserve when it opens in 2016. Another trend is the development of super-night clubs such as the XS at the Wynn Las Vegas Resort. The football field sized club XS serves thousands of dancers with a heart-pounding party atmosphere. Las Vegas now has 50 such clubs, including six of the top ten revenue-generating night clubs in the U.S. (Shockling, 2013; Associated Press, 2013A; Associated Press, 2013B).

### **Methodology and Findings**

Tourism in Macao is growing and the Macao Special Administrative Region (MSAR) government is planning to diversify the tourism attractions. This paper covers the similarities and differences between Las Vegas and Macao in terms of its markets and

its attractions, especially festivals and events. Las Vegas, one of the top gaming cities in the world, offers many different types of entertainment and recreation, and via a comparison of Las Vegas and Macao, this paper discusses how events and festivals can help a gaming destination such as Macao diversify its tourism.

Given that the study is exploratory and analytical in nature, this paper intends to discuss how events and festivals can help diversify tourism. Therefore, the study is based on secondary data. For this purpose, books, and research papers from reputed journals were primarily used in the literature review to provide a discussion of the use of events and festivals in tourism. However, research journal articles were not able to answer all questions relevant to the evaluation and assessment of the adoption of events and festivals in tourism. Therefore brochures, technical reports, newspaper articles and various websites were also used to collect data. These collected data were edited, classified, tabulated and finally analyzed by using tables.

Given that the study is exploratory in nature, the data from journal research papers primarily emphasize qualitative analysis, while the collected statistics from brochures, technical reports, and websites provide evidence upon which to base practice (Gray, 1998), and “a snapshot” of the situation at a certain point of time. The integration of qualitative “macro-level” analysis with quantitative “micro-level” evidence not only can provide more convincing findings, but also explicate phenomenon and enrich understandings (French et al., 2000; Kaplan and Duchon, 1988; Wynekoop, 1992).

This study deals with events, festivals, tourism markets, and two tourism destinations. This paper focuses on two places, Las Vegas and Macao, and the similarities and differences between their markets and their use of festivals and events to help diversify tourism.

### Findings

This section presents the findings of the study. There are tables with explanations about the gaming industry in Las Vegas and Macao, purpose of visits, meetings and conventions, visitor data, expenditures, shopping and shows, festivals and events.

**Table 1 Gaming Industry Comparison for 2012**

	<b>Macao</b>	<b>Las Vegas*</b>
Gross Domestic Product in billion USD	43.45	97.0
Casino gaming revenue in billion USD	37.95	10.9
Casino gaming revenue as a percentage of GDP	87.3	11.2

Source: DSEC and DICJ (2013)

\*Data for Las Vegas from Kou (2013).

Note: The exchange rate from Macau currency to USD is 8.0134 to 1.

As indicated in Table 1, the gaming revenue for Macao far exceeds that of Las Vegas, yet Las Vegas has more than double the overall Gross Domestic Product (GDP) of Macao. This also shows how Macao is less diversified as a tourism destination since gaming represents 87% of its GDP compared to just 11% for Las Vegas.

**Table 2 Main Purpose of Visit in percent in 2012**

Purpose	Macao <sup>(1)</sup>		Las Vegas <sup>(2)</sup>	
	2012	2009	2012	2009
Vacation/Pleasure	61	69	47	40
Gaming	9	8	8	13
Visit relatives and friends	7	7	14	15
Business, conventions and exhibits	4	10	16	17
Special events	n.a.	n.a.	7	6
Wedding	n.a.	n.a.	4	3
Others	19	5	4	6

Source: (1) Tourism Statistics (DSEC, 2009 and 2012).

(2) Las Vegas Visitor Profile Study (Las Vegas Convention and Visitors Authority, 2012).

In Table 2, data from 2009 and 2012 for Las Vegas was compared to similar data for Macao for 2009 and 2012. The Las Vegas 2012 data indicated that 47% of visitors were for vacation/pleasure, 16% for business, conventions and exhibits, and 14% for visiting friends and relatives, and just 8% primarily for gaming. As for Macao, while 61% were for vacation/pleasure, only 4% of the visitors were for business, conventions and exhibits, 7% for visiting friends and family, and 9% primarily for gaming. Although Macao started its convention business some years ago, the official statistics were only available starting from 2009. Anyhow, its statistics appears to be much less than that of Las Vegas.

For visitors with the major intention of gaming, both Macao and Las Vegas had more or less the same percentage. For Las Vegas, about 7% and 4% of visitors went for special events and weddings in 2012. However, such data were not available for Macao. 19% of visitors went to Macao for a variety of reasons, apart from those listed in the table.

Table 3 shows the totals for business meetings, exhibitions, and conventions in Macao and Las Vegas and their delegates. As indicated in Table 3, while statistics for Macao before 2009 were not available, conventions and related meetings in Las Vegas peaked in 2007 and suffered a serious setback with the recession in 2009 through 2010 before rebounding in 2011 and 2012. In any case, it is obvious that Las Vegas has many more meetings, exhibitions and conventions than Macao has.

**Table 3 Total for Meetings, Exhibitions and Conventions and Delegates Comparison**

Year	Macao*		Las Vegas	
	Total	Delegates	Total	Delegates
2012	1,022	1,612,961	21,615	4,994,014
2011	1,045	1,278,054	19,029	4,865,272
2010	1,399	806,135	18,004	4,473,134
2009	1,485	660,881	19,394	4,492,275
2008	n.a.	n.a.	22,454	5,899,725
2007	n.a.	n.a.	23,847	6,209,253
2006	n.a.	n.a.	23,825	6,307,961
2005	n.a.	n.a.	22,154	6,166,194
2004	n.a.	n.a.	22,286	5,724,864
2003	n.a.	n.a.	24,463	5,657,796
2002	n.a.	n.a.	23,031	5,105,450
2001	n.a.	n.a.	20,346	5,014,240
2000	n.a.	n.a.	3,722	3,853,363
1999	n.a.	n.a.	3,847	3,722,726

Source: Las Vegas Convention and Visitors Authority (2013)  
MICE Statistics (DSEC)

The Las Vegas convention statistics, in Table 3, are actually for business meetings and conventions, trade shows and such. The breakdown of Macao’s meetings and conventions in 2012 in Table 4 indicates that 44% are for commerce and trade, 12% for IT and other technology, 10% for medical and health, 9% for banking and finance, and 7% for travel and tourism.

**Table 4 Types of Meetings, Incentives, Conferences, and Exhibitions in Macao in 2012**

Types	Number of events	Percentage
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Commerce, Trade and Management	453	44.3
IT and Other Technology	124	12.1
Medical and Health	101	9.9
Banking and Finance	92	9.0
Travel and Tourism	80	7.8
Education and Training	65	6.4
Others	61	6.0
Culture and Arts	33	3.2
Judiciary and Law	13	1.3
Total	1022	100

Source: MICE Statistics (DSEC)

A review of Table 5 illustrates that Las Vegas had a greater total number of tourists, and 17% of visitors were from foreign countries. In comparison, only 11% of visitors to Macao were from foreign, non-Chinese countries. Macao had its largest concentration of tourists from neighbouring Chinese-speaking places, such as Mainland China, Hong Kong, and Taiwan.

**Table 5 Visitor Data Comparison for 2012**

	<b>Macao</b>	<b>Las Vegas</b>
Visitor Volume	28.1 million	39.7 million
Percent of visitors from foreign countries	11 <sup>(1)</sup>	17
Percent of visitors who bought a package or travel group trip	32	14
Percent of visitors for business purpose	4	16
Percent of visitors who stayed overnight	34.0	99.7
Average number of days stayed	1.0	4.3
Visitor average age	n.a.	44.8
Percent of visitors under 21	n.a.	11
Percent who gambled	over 75 <sup>(2)</sup>	72
Average number of hours per day spent gambling (among those who gambled)	n.a.	2.6
Average trip gambling budget (among those who gambled)	US\$1,350 <sup>(3)</sup>	US\$484.7

Source: (1) It excludes PRC, Hong Kong and Taiwan. If visitors from Taiwan are counted as visitors from foreign countries, the percentage would be 15%.

(2) McCartney, G. (2006).

(3) See note below about calculation of Macao visitor gambling budget.

When it came to the portfolio of tourists, about one-third of visitors bought a package or tour group trip to Macao, while Las Vegas had about 14%. In other words, Las Vegas had a greater proportion of visitors who were free travellers. About 16% of visitors to Las Vegas were for business, conventions or exhibit purpose, while Macao had only 4%. Despite the greater percentage of visitors who bought a package or travel group trip in Macao, only 34% of visitors stayed overnight and they stayed just one day on average. On the other hand, for Las Vegas, only about 14% of visitors bought a package or joined travel group tour. Almost all (99.7%) of Las Vegas visitors stayed overnight and their average stay was 4.3 days. In other words, most of visitors to Macao were day-trippers, while Las Vegas had multi-day tourists.

A review of the median age of visitors to Las Vegas showed that the average age was 44.8. In other words, it has gradually attracted greater number of young and middle-aged visitors. Similar data were not available in Macao.

In Las Vegas, about 72% of visitors gambled during their stay and they gambled, on average, for about US\$485 in their trip. On the other hand, Macao’s data were not available probably due to the explicit ban on gambling by the Communist party in China to party leaders and public officials in their stay in Macao. However, since the Macao gambling revenue was US\$37,954 million and the number of visitors was 28.1 million in 2012, the average gambling revenue per visitor was about US\$1,350. Although not all visitors to Macao took part in gambling, the average gambling revenue per visitor was several times that of a visitor in Las Vegas. The difference is even more striking when the number of days stayed is factored in. Then the Las Vegas gambling revenue per visitor drops to \$112.70 per day, while Macao’s stays the same since they have mostly day-trippers.

**Table 6 Expenditure Comparisons for 2012**

	<b>Macao*</b>	<b>Las Vegas</b>
Average trip gambling budget (among those who gambled)	US\$1,350	US\$484.7
Lodging expenditures (average per night – non package)	n.a.	US\$93.13
Average trip expenditures for lodging	US\$58.09	US\$307.33
Average trip expenditures for food and drinks	US\$42.68	US\$265.11
Average trip expenditures for local transport	US\$3.56	US\$57.77
Average trip expenditure for shopping	US\$114.06	US\$149.29
Average trip expenditure for shows and sightseeing	US\$4.56	US\$52.52

Percent who attended any shows during their current stay	n.a.	65
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Source: Tourism Statistics and Las Vegas visitor profile study 2012

\*Data were compiled from Visitor Expenditure Survey (DSEC)

Note: The exchange rate from Macao currency to USD is 8.0134 to 1.

Table 6 shows expenditures by Macao and Las Vegas visitors. As visitors in Macao usually stayed for one day, their average trip expenditure on food and drinks was only US\$42.68. Visitors in Las Vegas spent more than five times more on food and drinks although they spent about four times as long in their stay. Given that Macao is a tiny place and visitors only spent one day in Macao, they spent much less on local transport, only 6% of the expenditure in Las Vegas. On the other hand, visitors to Macao spent much on shopping (US\$114.06) although they were only day-trippers, compared to US\$149.29 spent by visitors to Las Vegas in four days. For shows and sightseeing, visitors to Macao spent US\$4.56, only 9% of what an average visitor spent in Las Vegas. From all the above, it appears that Macao's predominantly day trip visitors came primarily to gamble and shop.

One of the important trends over the years in Las Vegas is the emphasis on family entertainment and multi-faceted tourism. Many of the tourism attractions on the Las Vegas strip complement their gaming offerings with activities for families that are easily accessible from the street. Examples include the synchronized music-water fountain displays at the Bellagio Casino, exotic fish in an aquarium and a tropical rain forest at the Mirage, and a pirate show at the Treasure Island casino. Table 7 lists the types of shows during an eight month period in 2013. Many of these are "headliner events" featuring well known stars while others are "lounge acts", or "dinner shows", or other formats of shows. Most of these shows run almost every day of the week. Table 7 indicates that the most prominent type of shows is music shows.

**Table 7 Las Vegas Shows from 30 April, 2013 to 31 December, 2013**

Type	Number	Percentage
Music	176	55.0
Variety	29	9.1
Tribute acts	23	7.2
Play and Musicals	20	6.3
Comedy	14	4.4
Magic	14	4.4
Adult	13	4.1
Impressionists	11	3.4

Production	10	3.1
Dance	7	2.2
Hypnosis	3	0.9
Total	320	100.0

Source: <http://www.lasvegas.com/shows-and-events/>

Table 8 shows the major festivals and events planned for 2013 in Las Vegas. There is such variety that there is no predominant type. Various types of sports events have the most frequency but that entire category, including major golf tournaments, boxing events and basketball tournaments, takes only 21% share. Some of the events are “mega-events” with national television coverage and many thousands of spectators. These include NASCAR races, PGA Golf events, the Country Music Awards Show, the Billboard Music Awards Show, and National Finals Rodeo.

**Table 8 Major Las Vegas Festivals and Events for 2013**

Type	Number	Percentage
Sports (including boxing, golf, basketball, and others)	26	21.0
Music/Dance	16	12.9
Cars and Racing	14	11.3
Holiday	10	8.1
Fitness and Health (including races, fun runs, and contests)	10	8.1
Food and Drink	8	6.5
Arts	5	4.0
Charity	5	4.0
Parade	4	3.2
Rodeo	4	3.2
Others (including beauty, gaming, adult, and others)	22	17.7
Total	124	100.0

Source: Las Vegas Convention and Visitors Authority (2013)

Las Vegas Events Guide (2013)

Las Vegas Review Journal (2013)

Table 9 is a breakdown of the variety of events and festivals planned for May 2013 in Macao.

**Table 9 Macao events and festivals in May, 2013**

Type	Number	Percentage
Religion	9	37.5



Sport	6	25.0
Tourism and culture*	6	25.0
Arts	3	12.5
Total	24	100.0

Source: Macao government tourist office

\*includes lotus flower festival, fireworks display contest, A-ma cultural and tourism festival, Lusofonia festival, food festival and international museum day.

After reviewing Tables 7, 8 and 9, it is clear that shows, events and festivals in Macao are much fewer than those in Las Vegas. There are some shows in Macao produced by famous entertainment companies from Las Vegas, like the House of Dancing Waters and Taboo. However, unlike in Las Vegas, the Macao organizer usually gives a much shorter notice of the schedule. At the time of this writing in early May 2013, the authors could only find shows and concerts for the month of May and no data was available for other months.

### Findings Summary

In summary, the Macao tourism industry relies heavily on casino gaming, while Las Vegas' markets and revenues are more diversified, including nongaming segments such as convention participants and family leisure vacationers. Macao's clientele base is narrow, relying heavily on the two close-by markets: China and Hong Kong.

### **Discussions**

Macao's success in gaming has primarily been from a border-location strategy essentially feeding off the Hong Kong and mainland China outbound tourist markets, locations where casinos are illegal. However, this comparative advantage will start to erode in the future as more regional destinations such as Singapore, the Philippines and South Korea are now expanding their gaming industry, and Taiwan is now legalizing gaming, seeing the tourism and economic benefits that such a strategy can have. Yet several years after Macao's gaming liberalization, the event and festival segment still remains relatively undeveloped.

Over a billion people reside within a two-hour flight of Macao and three-fifths of the world's population within a five-hour flight (Jones Lang LaSalle Hotels, 2003), representing a massive potential source market for Macao (with China as its leading tourism market). However, casinos are becoming mainstream around much of Asia and the world. While Macao looks now to address its tourism redevelopment challenges, several of its regional neighbours will undoubtedly be keen to learn the

lessons from Macao on market repositioning and on the approach used to effectively handle the economic and social impacts of gaming development. Therefore, the enhancement of Macao's international destination image continues to be a moot issue for the MSAR, particularly in the last few years. The MSAR has coined itself as a "city of events" as its main strategy to rejuvenate its tourism industry, with an almost seamless occurrence of events year round. In 2005 Macao hosted the 4<sup>th</sup> East Asian Games mega-event, and in 2007 the much larger 2<sup>nd</sup> Indoor Asian Games, primarily to increase Macao's reputation and attractiveness (McCartney, 2005). However, these few events have not impacted Macao's tourism data very much. The statistics from brochures, technical reports and websites clearly show the fact that Macao is primarily a day trip destination for gaming and shopping. Compared to Las Vegas, with its long list of shows, festivals, events, and other leisure activities, Macao is a neophyte in tourism destination attraction variety and volume. Las Vegas Tourism data clearly shows its superiority in number of visitors, length of stay, and spending for lodging, food, transportation, shows and sightseeing.

The market risk from this narrow base is compounded by the fact that the tourist-generating countries are themselves sensitive to (possible) disastrous events and economic recession, making the demand unstable. Based upon this, lessons from Macao suggest that policymakers of gaming destinations worldwide should seek opportunities to attract a wider base of tourists, which will minimize the volatility of gaming demand (Kennedy, 1998).

Unfortunately it is easy to say "let's diversify the tourism market" but there are uncertainties about how it should be done. A central theme of this paper is that various types of festivals and events helped diversify and build the tourism market for Las Vegas as discussed by the macro-level analysis and evidenced by the micro-level statistics, but no study was found that shows a cause and effect relationship. As mentioned previously, there was a period in the 1990's when Las Vegas cut back on some family attractions (closing of the water park and some resort children's programs). Indeed, Las Vegas went back to its adult-themed roots with its "What happens in Vegas stays in Vegas" advertising campaign. The question could be asked "did Las Vegas fail to diversify its market in an effort to become more of a family destination?" Answers might be found in data comparing 2007 to 2012.

\*Visitors under the age of 21 increased from 8% to 11%;

\*Gambling as the primary purpose to visit decreased from 11% to 8%;

\*Percent of visitors who gamble decreased from 84% to 72%;

- \*Gaming revenues decreased from \$10.9 billion to \$9.4 billion;
- \*Vacation/Pleasure as the primary purpose to visit increased from 38% to 47%;
- \*Visitors from foreign countries increased from 12% to 17%;
- \*Total visitors increased slightly from 39.2 million to 39.7 million even though there was a recession;
- \*Hotel room inventory increased from 132,947 to 150,481;
- \*Conventions, trade shows and meetings decreased from 23,847 to 21,615;
- \*Convention delegates decreased from 6.2 million to 5 million

2007 source: Las Vegas Convention and Visitors Authority; 2012 Annual Report

## **Conclusions**

Data in the Findings section and in the Discussion section lead to several important conclusions:

- 1) The tourism market for Las Vegas has indeed diversified over the years. There has been an increased interest in vacation and pleasure and a somewhat decreased interest in gambling; it is younger; and it is more international.
- 2) Although hit hard by a major recession, the total number of visitors to Las Vegas has recovered even though the convention segment has not fully recovered.
- 3) The number of visitors to Macao has increased significantly over the years but they remain mostly day-trippers who are interested in gaming and shopping.
- 4) Gaming revenue is the primary component (87%) of Macao's GDP while it is a minority component (11%) of the Las Vegas GDP.
- 5) While Macao has developed some first-class festivals and events, it lags far behind Las Vegas in quantity and variety.

On the basis of the data and the conclusions above, two major conclusions are now reached:

- 1) Festivals, events, and other recreation attractions have played a major role in the growth and diversity of tourism for Las Vegas; and
- 2) Gaming destinations worldwide, including Macao, can learn from the Las Vegas experience and diversify its tourism through continued development of festivals, events, and other recreation attractions.

Tourism policy makers in gaming destinations need to address their problems immediately if they would like to develop into a diversified international tourist destination. Efforts should be directed to enhancing the tourist product portfolio and marketing the jurisdiction to a wider audience to diversify its customer mix. By restructuring its customer mix to comprise the most appropriate customers, the

gaming jurisdictions can have a more balanced and sustainable tourism and casino industry.

Tourism policy makers should not jump to the conclusion that their gaming jurisdictions can solve their marketing problems by simply replicating the Las Vegas concept. In fact, McCarthy (2005) indicates that many destinations sell themselves in very similar ways with few linkages to local ideas of identity. Although these gaming jurisdictions can learn from Las Vegas, the authorities of such jurisdictions must also bear in mind that their tourist market structure may be different from that of Las Vegas. In the case of Macao, when compared with Las Vegas, Macao is constrained by land space, which also limits its infrastructure capacity. Efforts should be dedicated to creating a unique image and destination experience for Macao under the current resource constraints, rather than simply imitating Las Vegas. Offering different kinds of products is a key aspect in this regard. In a nutshell, the diversification of the tourism and casino industry in a gaming jurisdiction relies on its ability for: (1) enriching its products and services; (2) diversifying its customer mix; and (3) differentiating its image from that of its competitors. Further research needs to be conducted to understand the tourism and leisure benefits desired by middle and upper income markets in the leading tourism markets. This includes current visitors to a particular destination, but more importantly, visitors who choose destinations other than the jurisdiction concerned. Tourism policy makers should find out what benefits they seek for their leisure travel and consider if their jurisdiction can develop experiences to meet those expectations.

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