



SURVEY TO
CONGRESS PARTICIPANTS

2011

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INTRODUCTION

Bearing in mind the relevancy of the MICE segment in the positioning of Lisbon as a tourism destination, and following up the work done in the previous years, the Observatório do Turismo de Lisboa had a new edition of the study regarding International Congresses in Lisbon.

During the months of May, June and September, the company 2ii - Informática e Informação, Lda. did a total of 909 interviews to international congress participants.

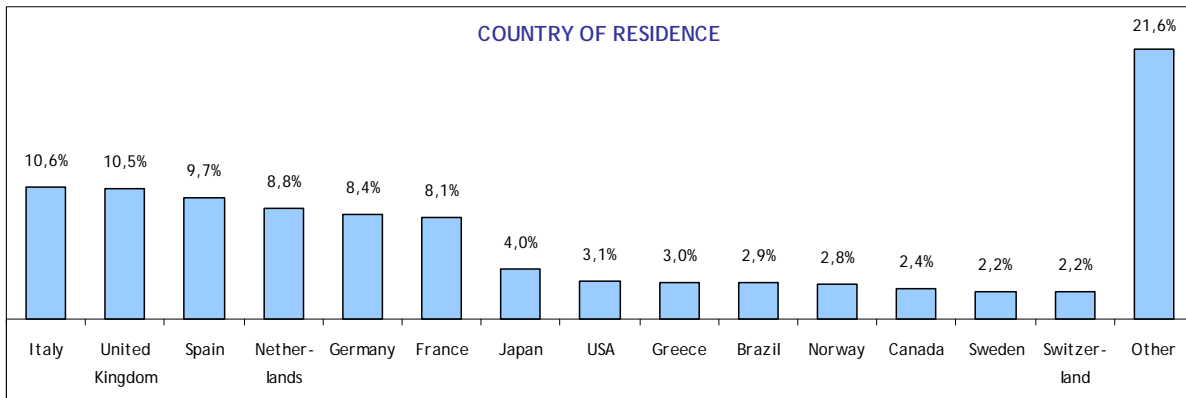
For the 2011 edition the following events were under analysis:

- 12th Congress of the European Association of Palliative Care, from May 19th to 21st at the Lisbon Congress Centre;
- XXI Regional European Congress of the International Society of Blood Transfusion - ISBT, from June 18th to 23rd at the Lisbon Congress Centre;
- Annual Meeting of the European Association for the Study of Diabetes - EASD, from September 12th to 16th at FIL and Atlantic Pavilion.

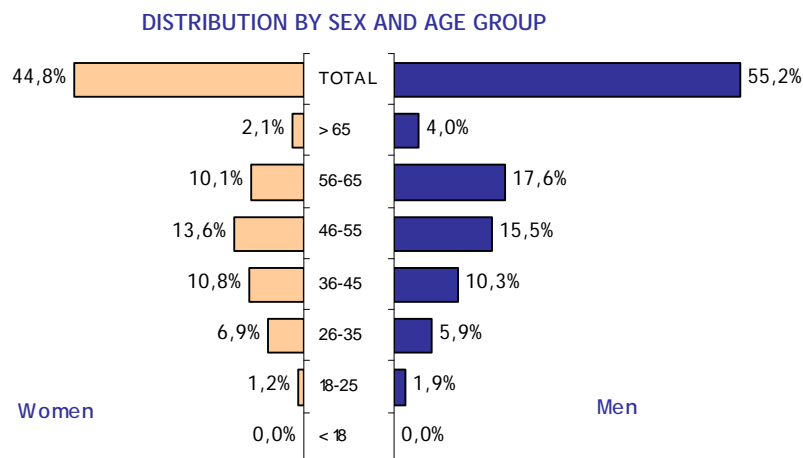
The aim of this report is to make an analysis of the data, highlighting the main conclusions and comparison with the previous year.

The specificity of the scope of the congresses might limit some of the results and should be taken into account.

MAIN RESULTS



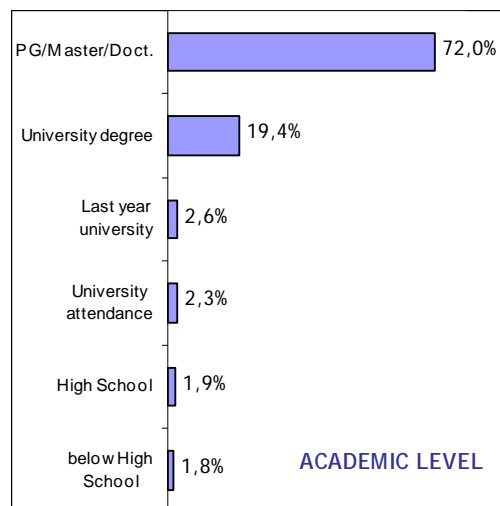
Regarding the country of residence of congress participants, the first places were held by Italy and the United Kingdom. Spain, even though with a larger share than in 2010 (9,6%), came from first to third place in 2011.



Male participants hold a major presence in these events, although decreasing their weight from 76,0% in 2010. Regarding the age groups, men are mostly between 56 and 65 years old and women between 46 and 55 years old.

In what concerns the academic level, 72,0% of congress participants holds a post-graduation, master or doctorate (56,0% in 2010).

3,6% did not attend university (4,8% in 2010).

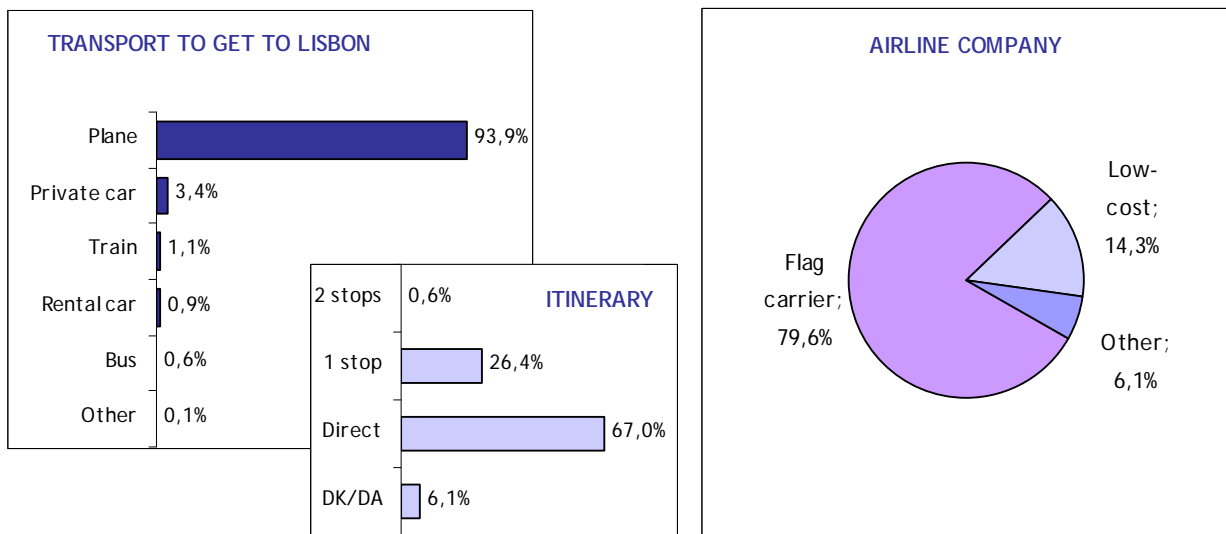


ACCOMMODATION	% total
5 ***** Hotel	28,7%
4 **** Hotel	55,7%
3 *** Hotel	5,1%
2 ** Hotel	7,8%
Local accommodation	2,6%
TOTAL	100,0%

The choice of accommodation went mainly to 4-star hotel units (56,2% in 2010).

Similarly to the two previous years, the total of participants was accommodated in the city of Lisbon.

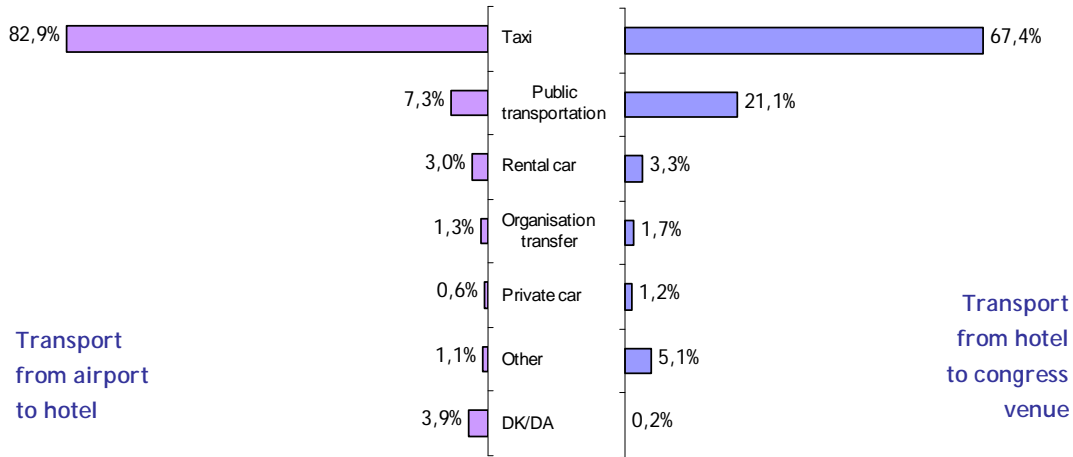
TRANSPORT



93,9% of congress participants arrived in Lisbon by plane (97,2% in 2010), 67,0% of which through a direct airline connection.

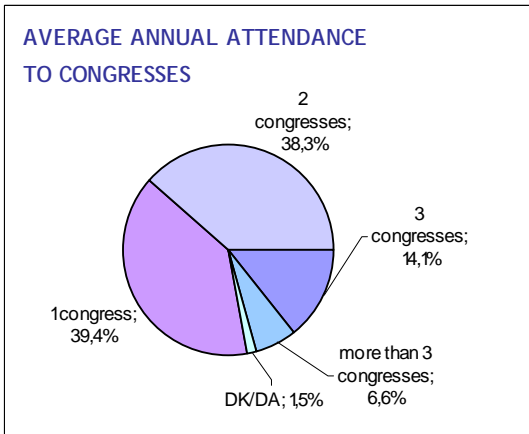
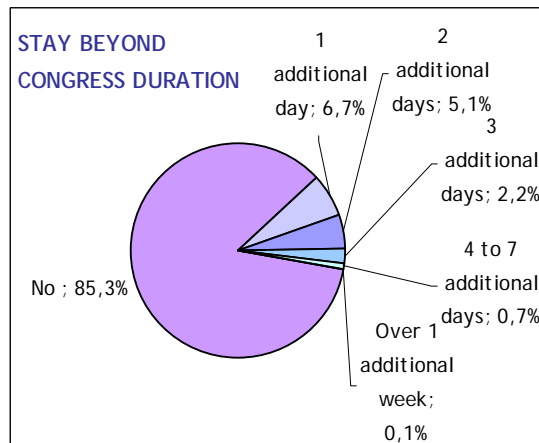
TAP still accounts for the carrier used by most congress participants, but in a considerable lower percentage, with 29,9% against 40,4% in 2010. The following most used carriers were Lufthansa (12,0%), British Airways (10,3%) and Air France (9,6%). The low-cost easyJet, which last year held the second place with a share of 11,6%, accounted for only 8,8% in 2011. The use of low-cost carriers as a whole decreased from 17,6% in 2010 to 14,3% this year.

The taxi remains the preferred means of transportation when going both from the airport to the hotel as well as from the hotel to the congress venue. The organisation transfer, which last year held second place, in 2011 gave way to public transportation (metro/carris).



ATTENDANCE TO CONGRESSES

14,7% of congress participants intends to stay in Lisbon beyond the congress duration (9,7% in 2010).



A slight majority of interviewed congress participants (39,4%) attends, on average, only one congress a year (62,4% in 2010). 6,6% goes to 3 or more congresses annually (0,2% in 2010).

Almost half of the congress participants had already visited Lisbon previously to the event in question (62,2% in 2010).



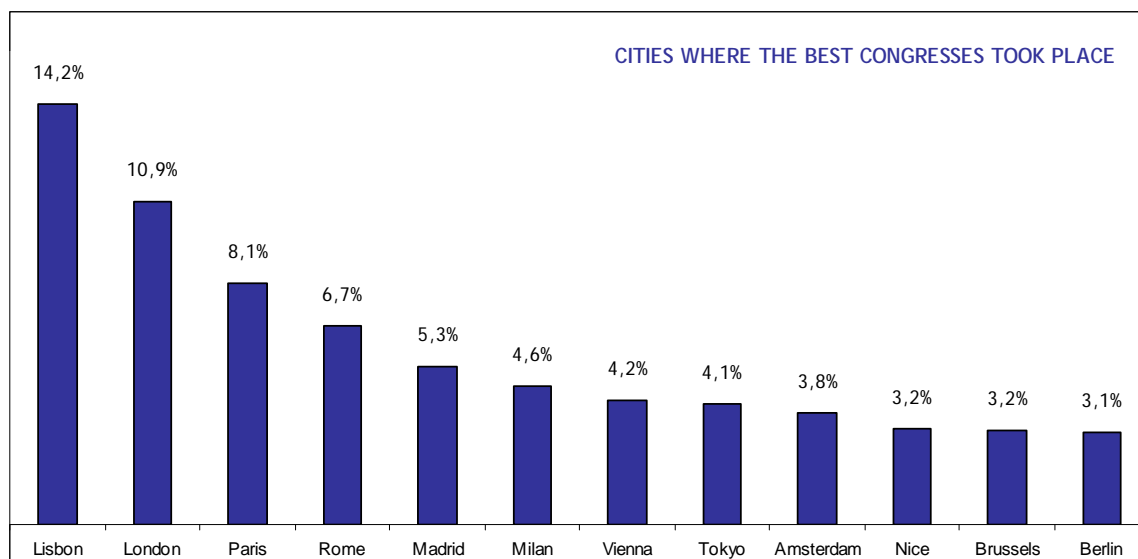
EVALUATION

CONGRESS EVALUATION (from 1 to 10)	Germany	Austria	Belgium	Brazil	Canada	Denmark	Spain	USA	Finland	France	Greece	Netherlands	Ireland	Italy	Japan	Luxembourg	Norway	United Kingdom	Sweden	Switzerland	Other	TOTAL
Quality of airport services	8,4	8,7	9,4	9,4	9,1	8,6	8,8	8,8	9,2	8,5	9,3	8,3	8,7	8,4	8,7	9,7	9,1	8,4	8,9	9,1	8,3	8,6
Quality of transportation from airport to hotel	8,3	8,7	9,1	9,2	9,0	8,7	8,7	8,7	8,9	8,5	9,2	8,3	8,9	8,4	8,5	9,5	9,0	8,4	8,8	9,3	8,4	8,6
Quality of transportation from hotel to congress venue	8,3	8,6	9,1	9,1	9,0	8,7	8,8	8,8	8,9	8,5	9,1	8,4	8,8	8,4	8,5	9,5	8,9	8,5	8,8	9,3	8,4	8,6
Quality of the hotel	8,7	8,9	9,4	9,2	9,1	8,8	8,9	9,0	9,6	8,9	9,1	8,6	8,9	8,7	8,8	9,8	9,1	8,7	9,0	9,4	8,6	8,8
Quality of restaurant services	8,4	8,4	9,1	8,9	8,9	8,7	8,6	8,7	8,9	8,6	9,0	8,4	8,6	8,5	8,6	9,4	8,9	8,7	8,6	9,1	8,5	8,6
Level of prices in Lisbon	7,9	8,1	8,5	7,9	8,5	8,6	7,8	8,2	7,8	7,9	8,5	8,0	7,8	8,2	8,1	8,0	8,2	8,3	8,4	8,5	8,4	8,1
Price of hotel	8,0	8,0	8,3	8,0	8,3	8,5	8,0	8,2	7,8	7,9	8,4	8,1	7,6	8,3	8,1	8,1	8,3	8,2	8,4	8,5	8,4	8,1
Price of restaurants	7,8	7,8	8,0	7,9	8,2	8,4	7,9	8,3	7,7	7,8	8,4	7,9	7,7	8,2	8,1	7,8	8,1	8,2	8,3	8,4	8,4	8,1
Price of transportation	7,9	7,6	7,6	7,6	8,0	8,3	7,7	8,2	7,5	7,8	8,3	8,0	7,4	8,2	7,9	7,4	8,1	8,2	8,1	8,3	8,4	8,0
Quality of equipment at the congress venue	8,9	9,5	9,1	9,2	9,0	8,9	8,9	9,1	9,1	8,8	9,2	9,0	9,2	9,0	8,8	9,8	9,2	8,7	8,9	8,9	8,8	9,0
Functionality of support equipment at the congress venue	9,1	9,5	9,3	9,5	9,1	8,9	9,1	9,3	9,4	8,8	9,3	9,1	9,3	9,1	9,1	9,7	9,2	8,7	9,0	9,0	8,9	9,0
Quality of the extra-congress programme	9,2	9,8	9,4	9,5	9,3	9,0	9,2	9,2	9,5	9,1	9,3	9,1	9,2	9,0	9,1	9,8	9,3	8,9	9,2	9,5	8,8	9,1
Global evaluation of congress organisation (except for scientific evaluation)	9,1	9,5	9,5	9,4	9,2	9,1	9,2	9,3	9,5	9,0	9,4	9,1	9,3	9,1	9,1	9,8	9,4	8,8	9,1	9,1	8,9	9,1
Global evaluation of Lisbon as a city for congresses	9,2	9,6	9,5	9,5	9,3	9,2	9,3	9,4	9,5	9,1	9,4	9,2	9,4	9,2	9,1	9,8	9,4	8,9	9,3	8,8	8,9	9,2
AVERAGE VALUE	8,5	8,7	8,9	8,9	8,9	8,7	8,6	8,8	8,8	8,5	9,0	8,5	8,6	8,6	8,6	9,2	8,9	8,5	8,8	8,9	8,6	8,6

This year the globally most valued criterion was the Quality of the extra-congress programme (9,1 in 10). The Functionality of support equipment at the congress venue and the Quality of the equipment at the congress venue remained also at the top of the list (9,0 in 10, respectively). At the end came the criteria related to the level of prices in Lisbon.

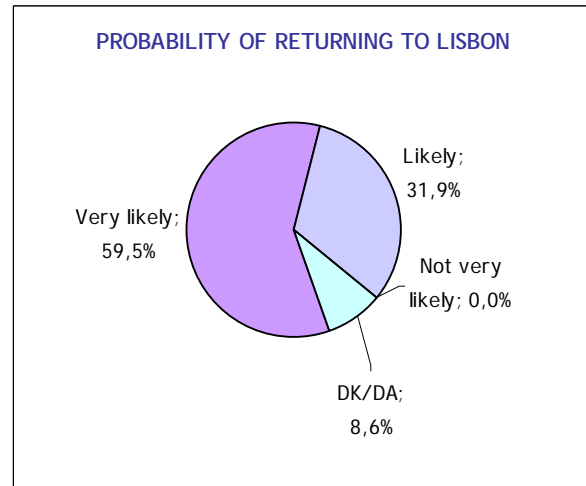
The congress participants who gave a highest average score to their congress experience in Lisbon were the Luxembourgers, the Greeks, the Belgian and the Swiss.

The global evaluation of Lisbon as a congress destination is higher than the average value of the evaluation per category (9,2 against 8,6). Last year the average values were 8,4 e 8,0, respectively.



Lisbon comes in 1st place among those cities where, according to the interviewed congress participants, the best congresses took place, reinforcing the lead held in 2010 (11,3%).

When questioned about the probability of returning to Lisbon, (and excluding the “don’t know / no answer” option), 65,1% of congress participants consider their return very likely (48,5% in 2010).



Similarly to 2010, Lisbon is recommended as a city for congresses by 100,0% of the participants attending the considered congresses. The same percentage also recommends Lisbon as a tourism destination.



EXPENSES

In what concerns the expenses of congress participants, 6 items were under consideration: Transportation and Congress Fee (unique value); Accommodation (value per night); and Local Transportation, Allowances and Others (value per day).

We have also to consider the possibility of the financing of some congress participants' expenses by some company or entity. Therefore, not all congress participants have direct personal costs in all analysed items. However, this payment (be it accommodation, transportation, fee, etc.) is expected to have been made by a third party. As a result, the average values we present are built only on amounts effectively spent by congress participants.

Of the congress participants who answered the question regarding expenses (39,6% of the total), 83,6% admitted having had transportation expenses in order to get to Lisbon, having paid an average of 393,48€. The congress fee, admittedly paid by 37,8% of the participants, cost an average of 251,66€. 96,1% had expenses with accommodation, in an average value of 115,36€ per night. Regarding allowances, 94,2% of congress participants admitted having had this expense, paying an average of 29,76€. The 94,2% who admitted having had local transportation expenses, have paid an average of 20,43€ per day. Other expenses, admitted to have been paid by 30,6% of congress participants, have an average daily value of 42,49€.

Average expense per participant	
Unique value:	
Transportation	393,48 €
Congress fee	251,66 €
Value per night:	
<small>(for an average stay of 2,8 overnights)</small>	
Accommodation	115,36 €
Value per day:	
<small>(for an average stay of 2,8 overnights we consider a stay of 3,8 days)</small>	
Allowances	29,76 €
Local transportation	20,43 €
Other	42,49 €
TOTAL	1.507,59 €

Average stay per participant	3,8 days
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The total value is lower than last year's (1.656,67€ in 2010), with increase only in the items of transportation (23,8%) and accommodation (24,5%). The congress fee suffered a decrease of 45,1% comparing to 2010.

The average stay of congress participants is 3,8 days (4,5 in 2010), which explains also the difference to last year's average expense.

Assuming a general-type congress participant attending one of the congresses under analysis, and contributing directly to every expenses item with its corresponding average value, we get an average expense per participant of 1.507,59€.