



SURVEY TO  
CONGRESS PARTICIPANTS

2018

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### INTRODUCTION

Bearing in mind the relevancy of the Meetings Industry 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 2018, the company Zii – Informática e Informação, Lda. did a total of 922 interviews to international congress participants.

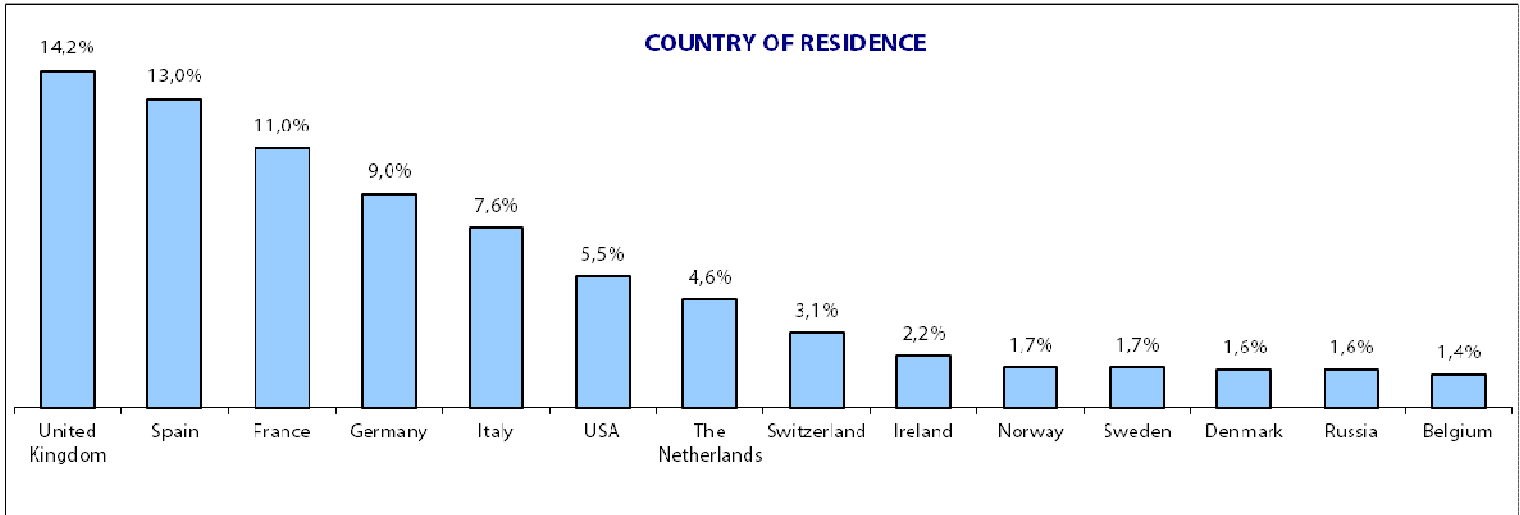
For the 2018 edition the following events were under analysis:

- EBMT 2018 – 44th Annual Meeting of the European Society for Blood and Marrow Transplantation, from March 18<sup>th</sup> to 21<sup>st</sup> at the Lisbon Congress Centre;
- 29th International Carbohydrate Symposium, from July 14<sup>th</sup> to 19<sup>th</sup> at Aula Magna and Faculty of Sciences of the University of Lisbon;
- Seatrade Cruise Med 2018, from September 18<sup>th</sup> to 20<sup>th</sup> at FIL.

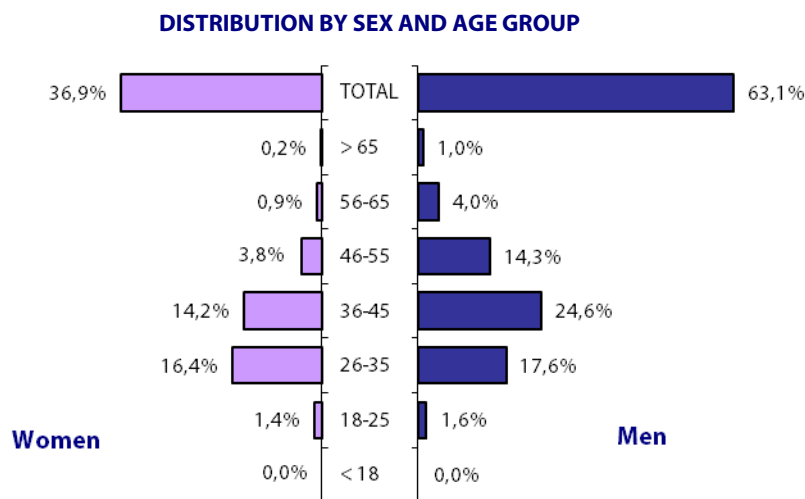
The aim of this report is to make an analysis of the data, highlighting the main conclusions and comparison with the previous year.

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

## MAIN RESULTS

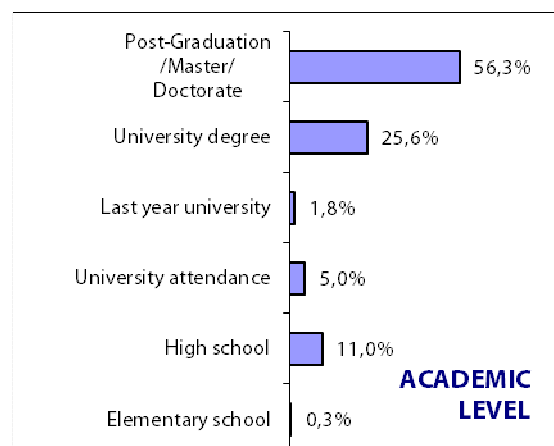


Regarding the country of residence of participants in the congresses under analysis, the United Kingdom occupied again the first place, followed by Spain and France. In 2017, the weight of these markets were 15,9%, 13,0% and 9,8%, respectively, with Germany coming in second place at 13,3%.



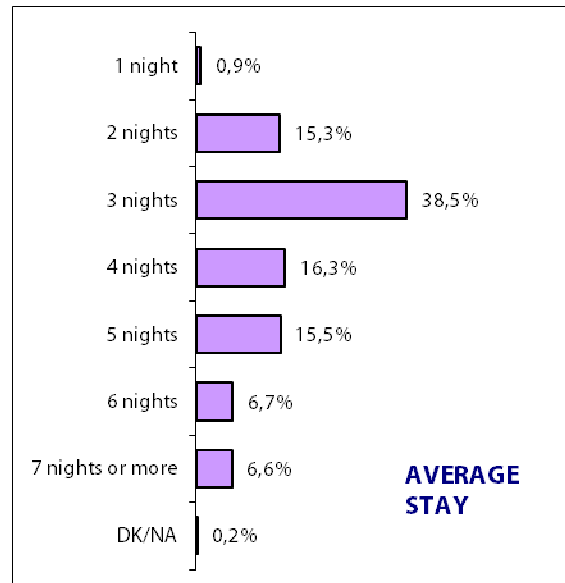
Within the congresses of this study, male participants continue to hold a stronger presence over female participants (slightly lower than the 64,7% in 2017). Regarding the age groups, women were predominantly between 26 and 35 years old, while men were mainly between 36 and 45 years old.

In what concerns the academic level, 56,3% of congress participants hold a post-graduation, master or doctorate (55,7% in 2017).



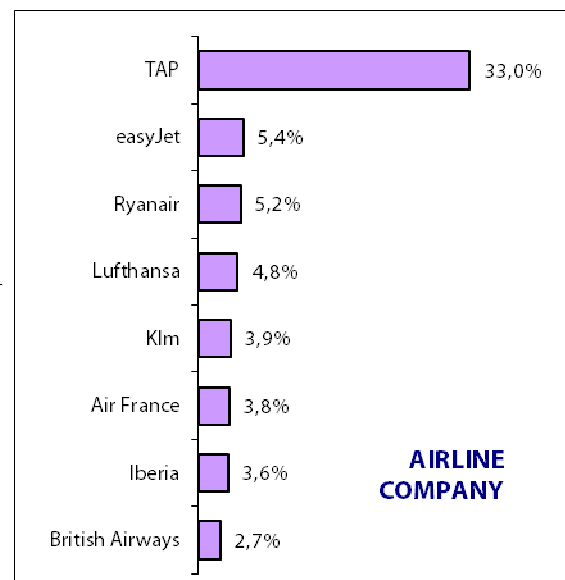
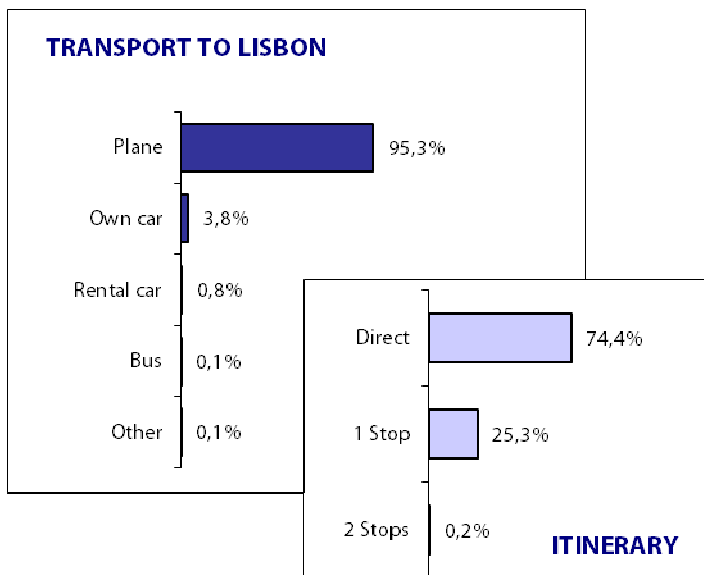
The average stay in the Lisbon Region was of 3,8 nights (4 nights in 2017), while 28,8% of the participants in these events stayed 5 or more nights (27,0% in 2016).

ACCOMMODATION	% total
5 ***** Hotel	13,9%
4 **** Hotel	61,1%
4 **** Aparthotel	0,5%
3 *** Hotel	12,3%
2 ** Hotel	2,2%
1 * Hotel	0,1%
Pousada	0,3%
Local accommodation	7,3%
DK/NA	2,4%
<b>TOTAL</b>	<b>100%</b>



The choice of accommodation went mainly to 4-star hotel units (64,3% in 2017). 7,3% chose local accommodation (9,4% in 2017).

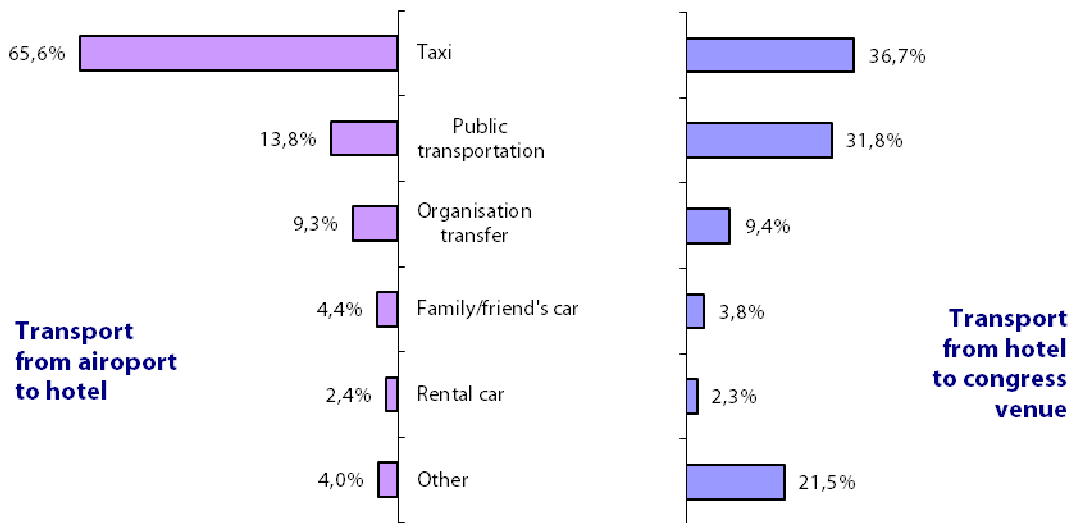
## TRANSPORT



95,3% of congress participants arrived in Lisbon by plane (95,0% in 2017), 74,4% of which through a direct airline connection.

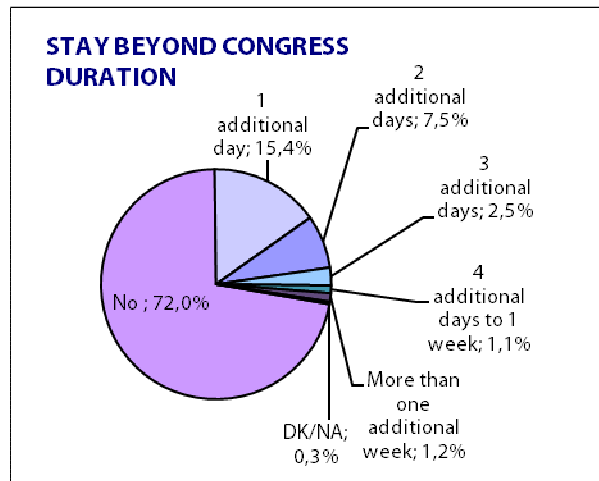
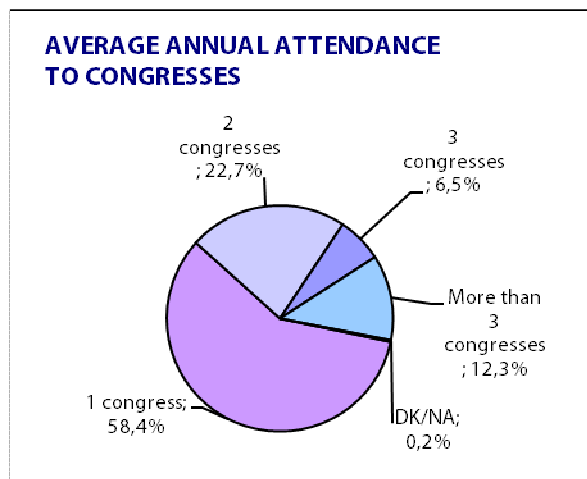
TAP accounts for the carrier used by most congress participants, with 33,0% of the answers (31,6% in 2017). Inverting the places from the previous year, following are easyJet (5,4%) and Ryanair (5,2%). The use of low-cost carriers as a whole decreased their weight from 33,4% in 2017 to 15,8% this year.

The taxi remains the preferred means of transportation when going from the airport to the hotel (67,3% in 2017). While in 2017, from the hotel to the congress venue the option went for a combination between public transportation (37,4%) and other means of transport (40,9%), in 2018 the taxi was the most used.



### ATTENDANCE TO CONGRESSES

27,7% of congress participants intends to stay in Lisbon beyond the congress duration (22,4% in 2017).



The majority of interviewed congress participants (58,4%) attends, on average, 1 congress a year (63,3% in 2017). 12,3% attends, on average, 3 or more events annually (16,9% in 2017).

30,9% of the congress participants had already visited Lisbon previously to the event in question (35,5% in 2017).

42,8% travelled alone, while 32,0% was accompanied by one other person.

In 2017, these percentages were of 52,0% and 28,3%, respectively.



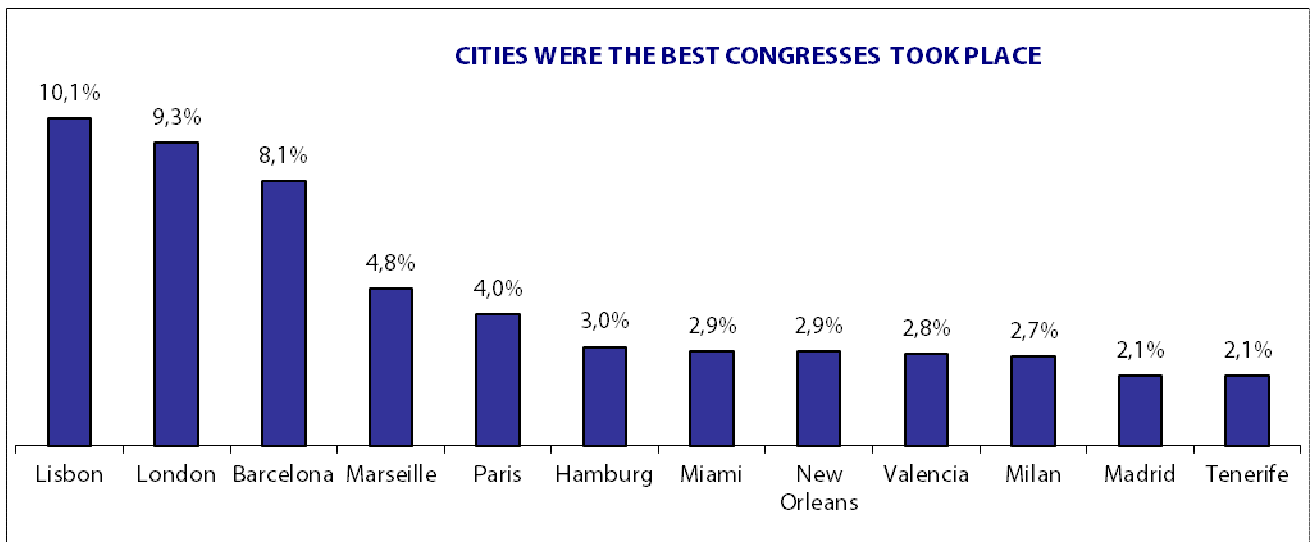
## EVALUATION

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

Similarly to 2017, the globally most valued criteria in 2018 were the Quality of the extra-congress programme, the Functionality of support equipment at the congress venue, and the Prices of transportation in Lisbon.

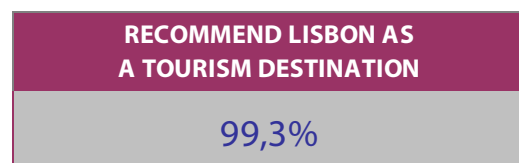
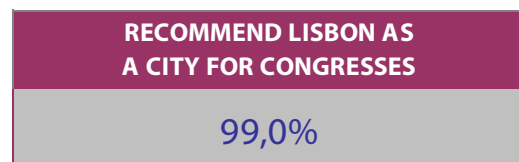
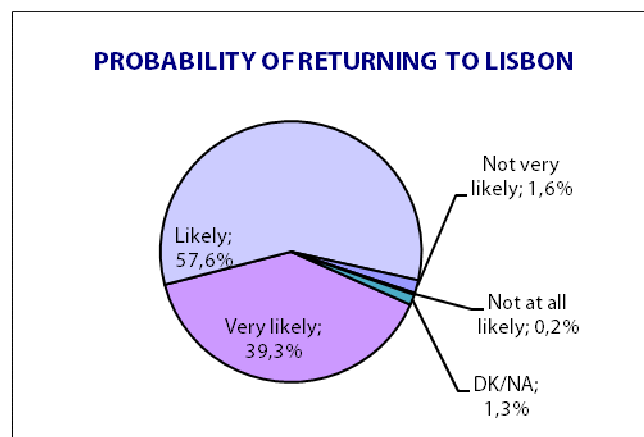
The congress participants who gave the highest average score to their congress experience in Lisbon were the ones from the United States of America, Spain and Japan.

The global evaluation of Lisbon as a congress destination is higher than the average value of the evaluation per category (8,6 against 8,1). In 2017, the average values were 8,7 and 8,2, respectively.



In the congresses under analysis in 2018, Lisbon comes in 1<sup>st</sup> place among those cities where, according to the interviewed congress participants, the best congresses took place (21,5% in 2017). As in the previous year, London and Barcelona occupy the second and third positions (14,3% and 7,0% in 2017, respectively).

When questioned about the probability of returning to Lisbon, (and excluding the "don't know / no answer" option), 39,8% of congress participants consider their return very likely (48,1% in 2017).



99,0% the participants attending the considered congresses recommended Lisbon as a city for congresses. As a tourism destination this recommendation is of 99,3%. In 2017, the percentages were, respectively, of 98,7% and 99,0%.

## 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 (68,4% of the total), 22,8% admitted having had transportation expenses in order to get to Lisbon, having paid an average of 467,24€. The congress fee, admittedly paid by 25,0% of the participants, cost an average of 490,11€. 34,8% had expenses with accommodation, in an average value of 123,59€ per night. Regarding allowances, 90,3% congress participants admitted having had this expense, paying an average of 40,05€. 74,8% admitted having had local transportation expenses, having paid an average of 17,79€ per day. Other expenses, admitted having been paid by 63,3% of congress participants, had an average daily value of 36,85€.

Average expense per participant	
<b>Unique value:</b>	
Transportation	467,24 €
Congress fee	490,11 €
<b>Value per night:</b> (for an average stay of 3,8 nights)	
Accommodation	123,59 €
<b>Value per day:</b> (for an average stay of 4,3 days)	
Allowances	40,05 €
Local transportation	17,79 €
Other	36,85 €
<b>TOTAL</b>	<b>1.814,12 €</b>

<b>Average stay per participant</b>	<b>4,3 days</b>
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The total value is slightly lower than last year's: 1.860,75€. In spite of a small decrease in the average stay, this difference is mainly due to lower costs in the Transport to Lisbon (-13,1% than in 2017). The only other item with a lower value than last year's were the Allowences (-3,4%). While Local transportation in the destination increased +42,9%, the Other expenses increased +35,7% from 2017.

The average stay of congress participants is 4,3 days (4,8 days in 2017).

Assuming a general-type congress participant attending the congresses under analysis, and contributing directly to every expenses item with its corresponding average value, we get an average expense per participant of **1.814,12€**.