



SURVEY TO CRUISE PASSENGERS

PORTO DE LISBOA

2017

SURVEY TO CRUISE PASSENGERS

INTRODUCTION

Following up the study Observatório do Turismo de Lisboa has been doing in the previous years, together with the Administração do Porto de Lisboa regarding the profile of the cruise passenger and his/her level of satisfaction with the visit to Lisbon, a new edition was carried out in 2017.

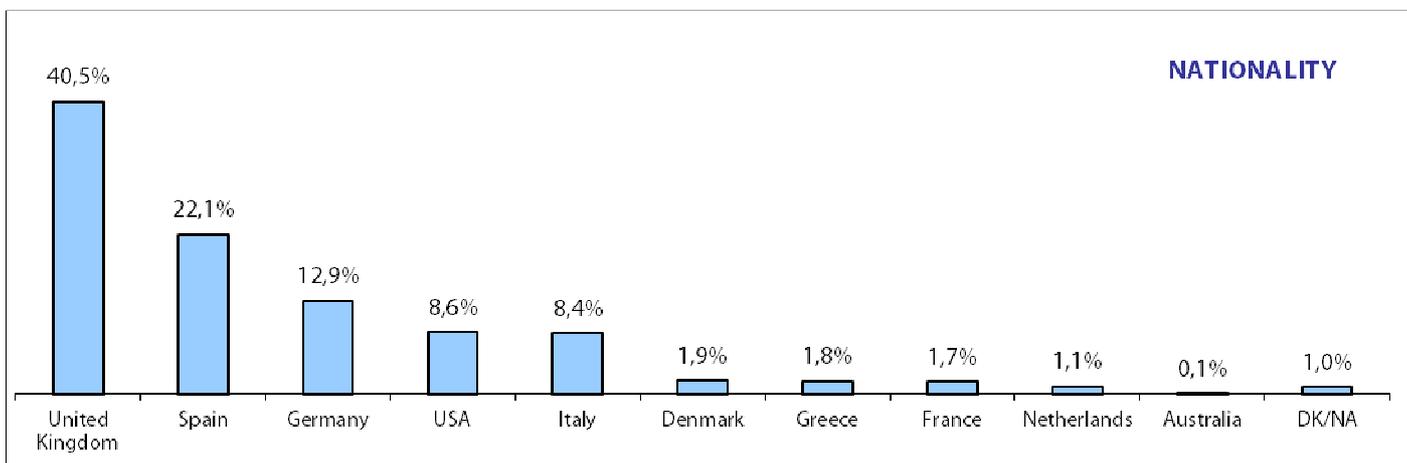
With this objective, a sample of 49 ships stopping in Lisbon between April and November was selected, where we were able to interview 1003 foreign passengers.

Based on a questionnaire designed by the Observatório do Turismo de Lisboa, the interviews were conducted by the company 2ii – Informática e Informação, Lda.

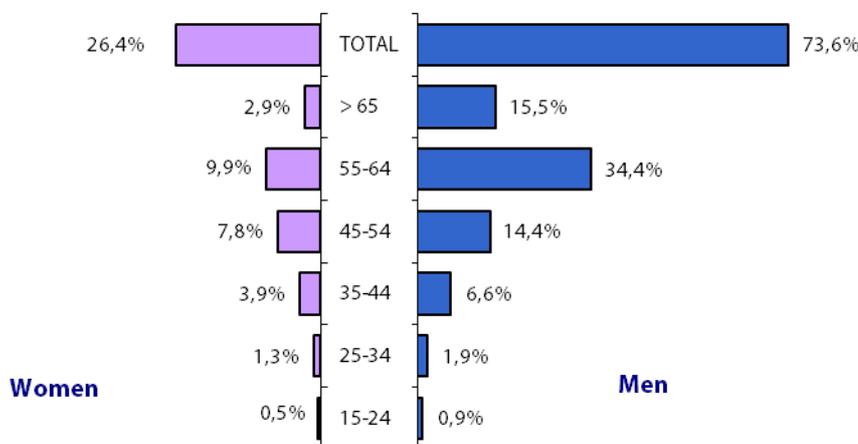
This report intends to be an analysis of the gathered data, highlighting the main results.

PROFILE

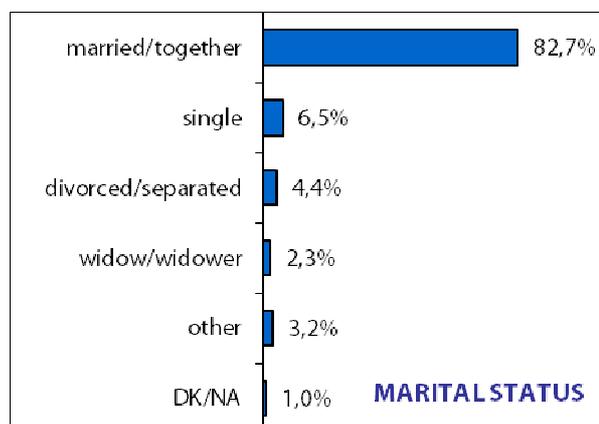
Similarly to previous years, in terms of nationality, 40,5% of the passengers interviewed are British (40,6% in 2016). The second place belongs to Spain (11,3% in 2016), and the third place to Germany (10,6% in 2016).



73,6% of the passengers is male (65,7% in 2016). In terms of age group, 62,7% is over 55 years old, 32,7% is between 35 and 54 and 4,7% below 35. In 2016, those percentages were, respectively, 37,8%, 50,3% and 11,9%.

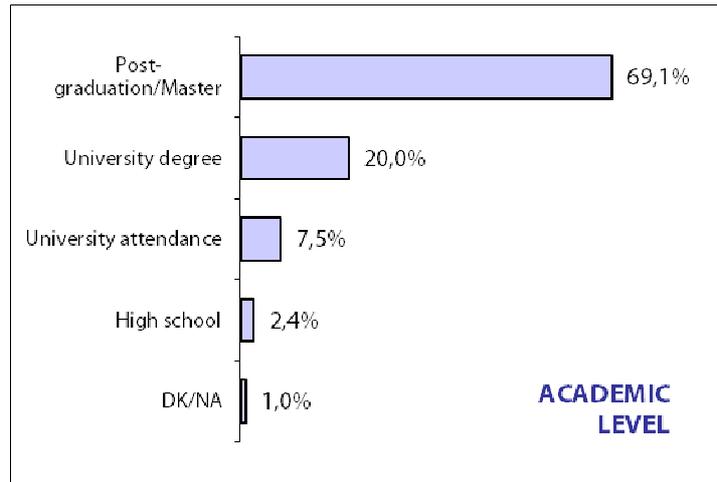


As a common trend in this study, the large majority of the passengers is married or with a life partner (74,7% in 2016).

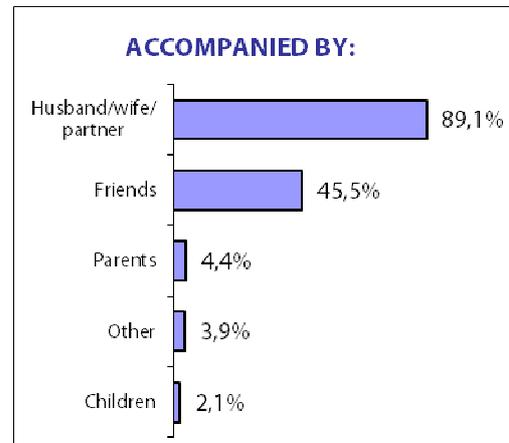


In what concerns the academic level, 89,1% of the passengers holds at least a university degree (69,1% in 2016).

The weight of retired passengers was of 9,7% (12,0% in 2016).

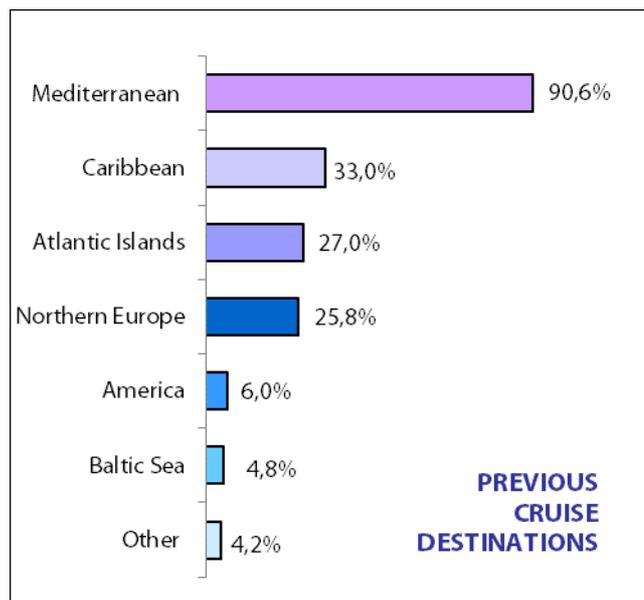
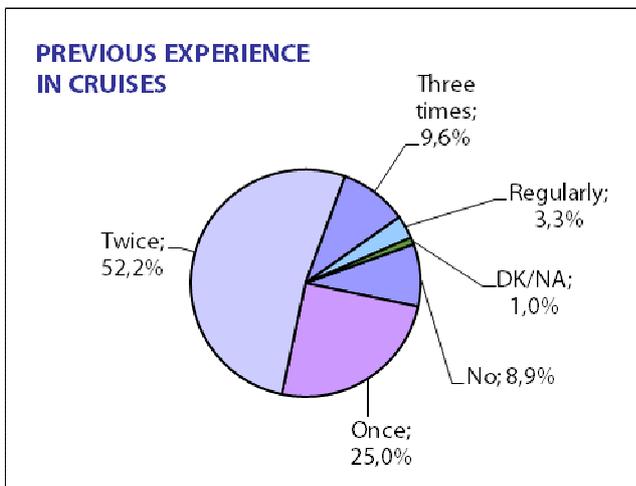


As has usually been the case, the strong majority of the interviewed passengers (98,3%) travels accompanied (98,1% in 2016). 89,1% of those, travels with their wife/husband/partner, with 44,8% travelling only as a couple (28,1% in 2016), and 6,1% only with friends (12,8% in 2016).

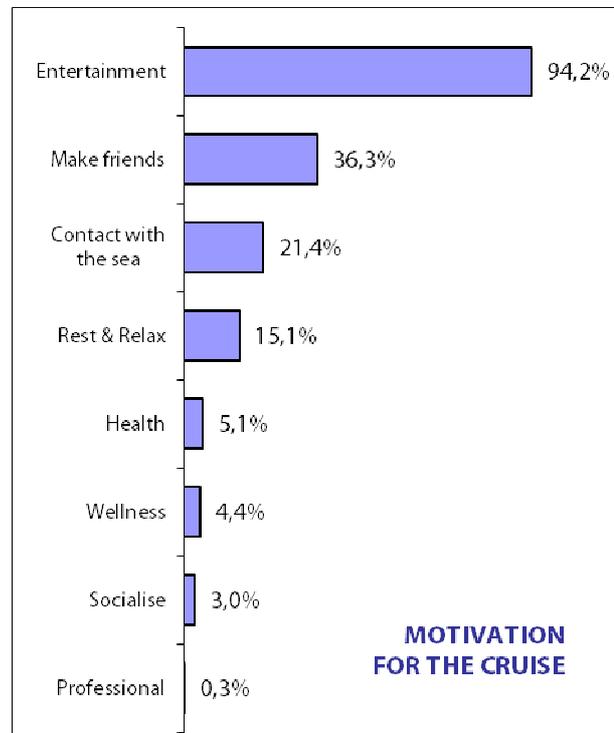
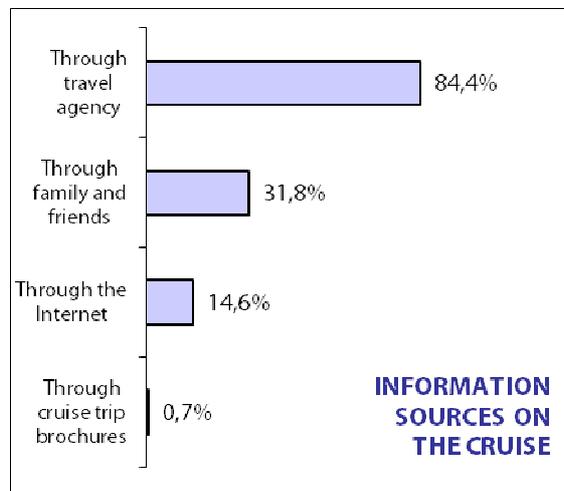


THE CRUISE

8,9% dos of the passengers were on their first cruise (33,0% in 2016). On average, the cruises they were in had a duration of 13,1 days. 90,1% had had previous experiences in this type of tourism (67,0% in 2016), and, of these, the majority chose the Mediterranean or the Caribbean as a destination.



While last year the main source of information about the cruise was family and friends (50,4%), in 2017 the preference went to travel agencies (41,3% in 2016).

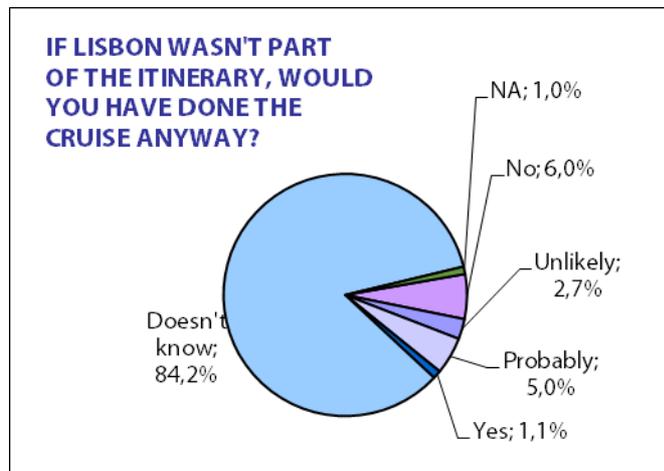


For the interviewed passengers, the Leisure element keeps being the main reason for doing a cruise (83,3% in 2016). In second and third places came Making friends and Contact with the sea.

INFLUENCE WHEN CHOOSING THE CRUISE	not at all important	slightly important	very important	DK/NA
The cities present in the cruise itinerary	0,0%	36,3%	62,7%	1,0%
Travel agent's advice	10,0%	59,3%	29,7%	1,0%
The cruise company providing this cruise trip	13,9%	55,9%	29,2%	1,0%
Previous cruise in other destinations	16,0%	54,0%	29,0%	1,0%
The price of the cruise trip	23,2%	64,1%	11,7%	1,0%
The chance to visit Lisbon	0,1%	88,3%	10,6%	1,0%
Accommodation conditions on board	0,0%	90,3%	8,7%	1,0%
Quality of restaurants on board	0,0%	92,0%	7,0%	1,0%
Entertainment on board	0,1%	92,2%	6,7%	1,0%
Possibility to rest on board	2,4%	91,0%	5,6%	1,0%
Programs for single people	54,7%	41,2%	3,1%	1,0%
A previous cruise trip calling Lisbon	19,3%	77,6%	2,1%	1,0%
Number of passengers on board	53,1%	44,4%	1,5%	1,0%

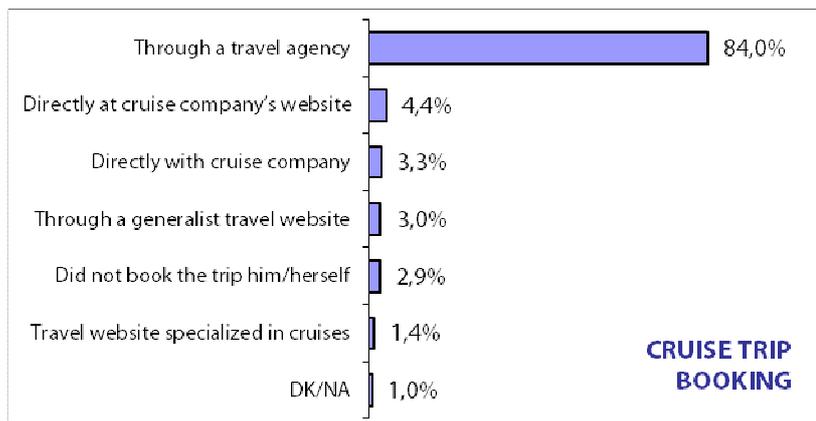
On a scale from 1 to 5, the factor that most influenced the decision to make this cruise were the ports of call included in the itinerary, the same as in 2016. The travel agent's advice comes in second place, while last year it was the possibility of visiting Lisbon. The cruise company

providing the cruise and previous cruises in other destinations also have some relevancy as influencing factors.



2,7% of the interviewed passengers finds very unlikely having done the cruise if Lisbon was out of the itinerary, while 6,0% would definitely not have done it (in 2016, the percentages were, respectively of 12,4% and 25,6%).

The cruise trip booking was made, in the large majority of cases, through a travel agent (42,0% in 2016), while 7,7% booked the trip with the cruise company (36,1% in 2016).



Evaluating the conditions on board the ship (on a scale from 1 to 10), Safety and navigation, as in 2016, comes in first place. Services/facilities and the Atmosphere on board are also in top positions.

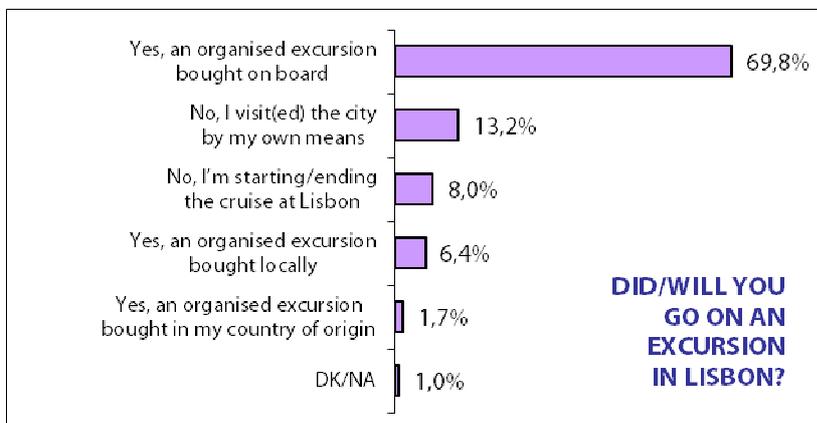
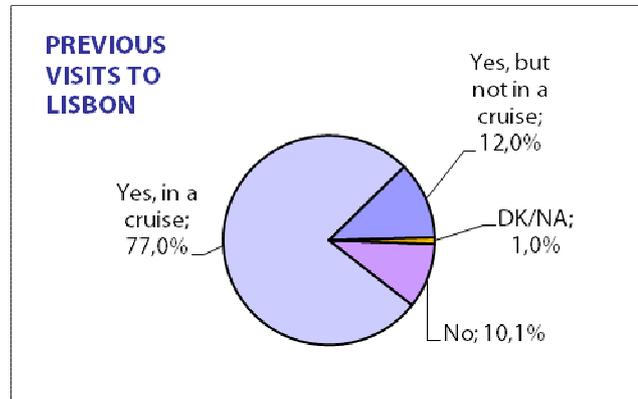
CONDITIONS ON BOARD THE SHIP	evaluation (from 1 to 10)
Safety and navigation	8,93
Services/facilities on board	8,66
Atmosphere on board	8,59
Animation and entertainment	8,51
Ship's functionality and aesthetics	8,33
Interaction with staff from the ship	8,29
Value for money	8,26
Interaction with other passengers	8,26

On a scale from 1 to 10, the average level of satisfaction with the Cruise was of 8,37 (8,29 in 2016).



THE VISIT TO LISBON

88,9% of the interviewed passengers had already visited Lisbon previously (49,0% em 2016). 77,0% had done it also in the context of a cruise trip (27,5% in 2016).

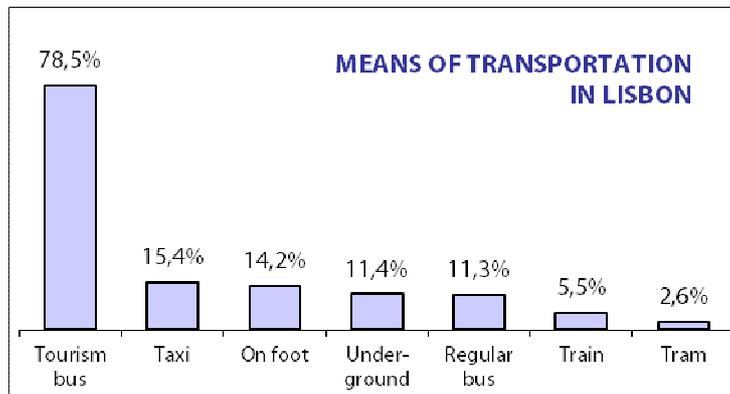


As well as last year, the majority of passengers chose to do a guided tour in Lisbon bought on board the ship (41,1% in 2016). 13,2% opted to visit the city on their own (37,8% in 2016),

The main sources of information on Lisbon were aboard the one available aboard the Ship, the Travel agency and Friends or Family. In 2016, the lead belonged, in decreasing order, to Friends or Family, the Ship and the Social media.

SOURCES OF INFORMATION ON LISBON (level of use)	DK/DA	no use	little use	much use
In the ship	1,2%	5,8%	44,4%	48,7%
Through a travel agent	1,2%	8,6%	68,8%	21,4%
Through Friends and family	1,2%	75,3%	10,0%	13,6%
Through advertising	1,2%	54,7%	33,2%	10,9%
Through catalogues/ brochures	1,2%	32,1%	57,5%	9,2%
Through social media	1,2%	84,1%	5,8%	8,9%
Through www.visitlisboa.com website	1,2%	82,3%	9,9%	6,7%
Through other official websites	1,2%	84,8%	7,8%	6,2%
Through the TV	1,2%	56,8%	35,8%	6,2%
By email	1,2%	89,1%	6,0%	3,7%
Through books/ movies	1,2%	57,7%	40,4%	0,7%
Through press articles/news	1,2%	34,5%	64,0%	0,3%

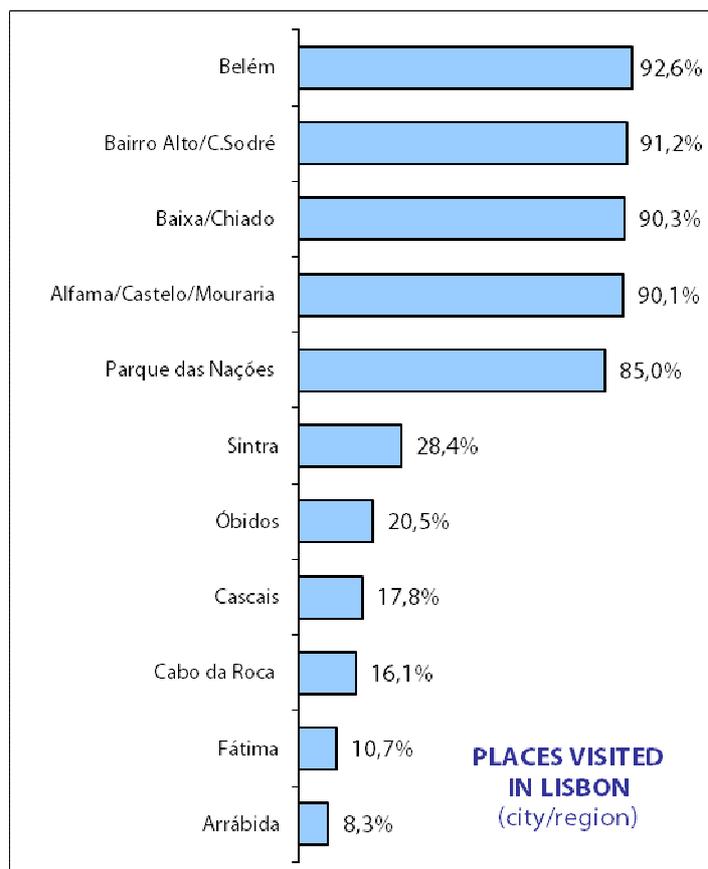
While visiting Lisbon, most people got around by tourism bus, as in the previous year. On this edition, both the taxi and the walking around were less preferred (48,4% and 53,8%, respectively, in 2016). The use of the underground, however, increased again: from 4,0% in 2015 and from 9,6% in 2016.



In 2017, the most popular visited areas within the city of Lisbon were Belém, Bairro Alto/Cais do Sodré and Baixa-Chiado. In 2016, there preference went to Baixa-Chiado, Alfama/Castelo/Mouraria and Bairro Alto/Cais do Sodré. Within the Lisbon Region, Sintra is Visited by 28,4% of these cruise passengers, followed by Óbidos, with 20,5%.

On average, these passengers spent 13:46 hours in Lisbon (11:21 em 2016).

10,3% of the interviewed passengers spent the overnight in an hotel in Lisbon (5,1% in 2016).



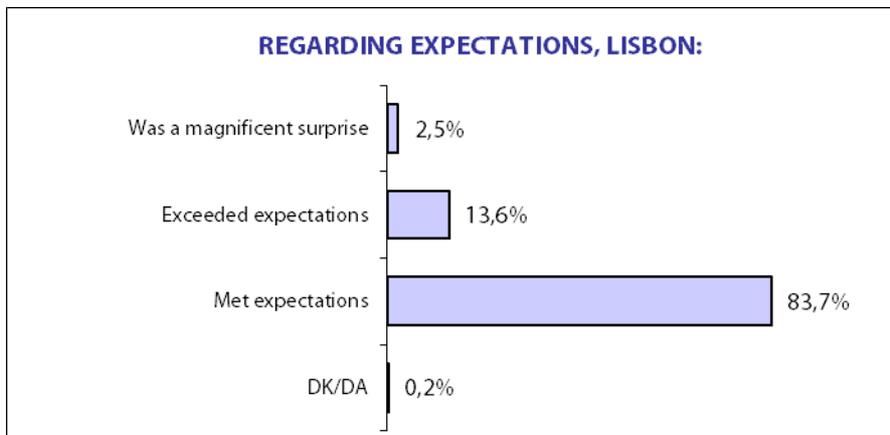
When asked about what they liked most in Lisbon, all the elements of the experience received high evaluations, with the lead belonging to the Monuments, churches and museums, the Weather, Cleanliness and Safety. In 2016, the top positions were held by either, Walking around the city, the Prices and Gastronomy & Wine.

LISBON OFFER	evaluation (from 1 to 10)
Monuments, churches and museums	9,13
Weather	9,10
Cleanliness	9,01
Safety	8,97
Walking around the city	8,92
Professional welcoming	8,88
Quality of the organized excursion in Lisbon	8,86
Fastness accessing the city	8,54
Quality of welcoming services at Lisbon Port	8,45
Safety during embarking/disembarking	8,43
Gastronomy and wines	8,36
Quality of tourist information about Lisbon	8,34
Prices	8,28
Service at restaurants	8,28
Access to tourist information about Lisbon	8,27
Fastness of embarking/disembarking formalities	8,26
Interaction with local people	8,25
Quality of cultural offer	8,23
Landscapes and urban environment	8,21
Interaction with other Lisbon visitors	8,18
Quality of commercial offer	8,17

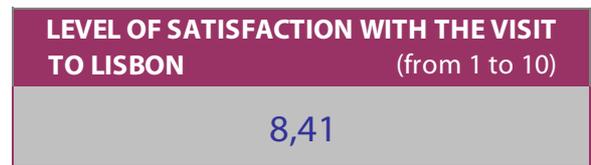
In what concerns the level of satisfaction with services at the Port of Lisbon, the average value was of 8,33, on a scale from 1 to 10 (8,00 in 2016).

LEVEL OF SATISFACTION WITH THE PORT OF LISBON	(from 1 to 10)
	8,33

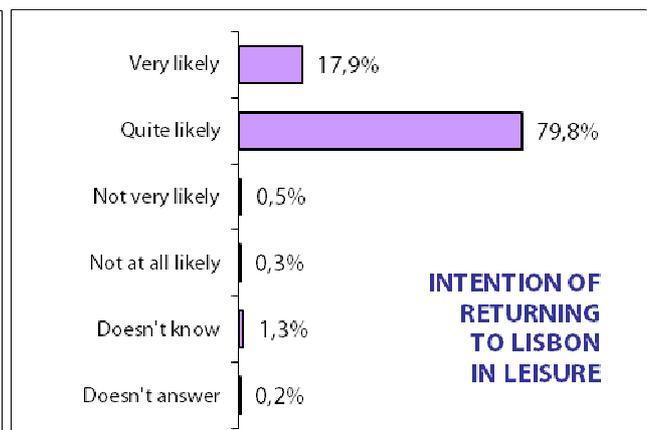
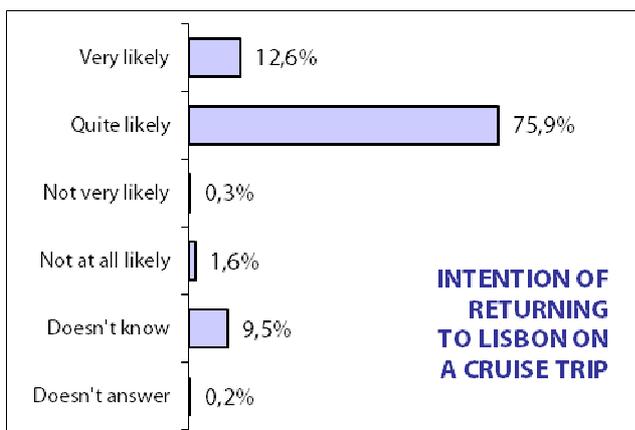
Regarding the expectation previous to their visit to Lisbon, 16,1% of these passengers saw their expectations exceeded (51,0% in 2016).



On a scale from 1 to 10, the average level of satisfaction with the visit to Lisbon was of 8,41 (8,59 in 2016).



88,4% of the passengers considers the return to Lisbon in a cruise trip as likely or very likely, (49,4% in 2016), while 97,7% has the same evaluation of their return to the city in leisure and outside the context of a cruise (88,8% in 2016).



As in 2016, all the interviewed passengers recommend Lisbon as a port of call, as well as a global tourism destination.



In what concerns their recommendation as a tourism destination, 16,5% of these cruise passengers places Lisbon in the Top 5 destinations to be visited (12,2% in 2016), while 78,3% include Lisbon in the Top 10 (81,3% in 2016).

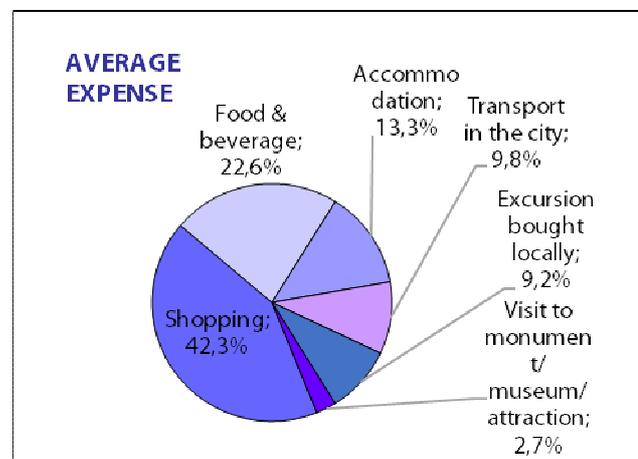


EXPENSES

From the information gathered on the expenses made during their cruise trip (43,3% of the total of interviewed passengers), we were able to obtain, an average daily individual expense of **49,31 euros** during their visit to Lisbon (57,10 euros in 2016). One should take into consideration when comparing to last year, that the sample of interviewed passengers is considerably older, and, on the other hand, has doubled the use of a travel agency for their booking, which might lead to less extra expenses outside the cruise package.

Additionally, in comparison with 2016, a high percentage of passengers had already visited Lisbon previously to this trip.

Em 2017, the components of this expense had, on average, the following distribution:



In what concerns the items that integrate this expense, not all the interviewed passengers spent money in all of them.

From the passengers who answered the expenses question, 12,7% said they have had expenses while visiting Monuments, Museums or Attractions (21,5% in 2016), 87,8% of the passengers indicated having spent money on Shopping (73,6% in 2016), 57,6% had expenses on Food & Beverage (76,5% in 2016), 31,3% spent money in Transportation while in Lisbon (68,2% in 2016), and 12,9% says to have bought an excursion in Lisbon (4,4% in 2016). And finally, 16,8% had accommodation expenses (2,4% in 2016).

EXPENSES	% passengers who affirm to have had this expense	average cost for the passengers who had this expense (per person)
Visit to monuments/museums / attractions	12,7%	10,56 €
Shopping	87,8%	23,77 €
Food & beverage	57,6%	19,38 €
Transport in the city	31,3%	15,47 €
Excursion bought locally	12,9%	34,97 €
Accommodation	16,8%	39,08 €
Other	0,0%	n.a.

On average, the individual amounts spent in each component were as follows: Monuments, Museums or Attractions - 10,56 euros (9,36 euros in 2016); Shopping - 23,77 euros (34,24 euros in 2016); Food & Beverage - 19,38 euros (23,48 euros in 2016); Transportation in Lisbon - 15,47 euros (12,68 euros in 2016), Excursion bought locally - 34,97 euros (24,90 euros in 2016) e Accommodation - 39,08 (93,04 euros in 2016).

In comparison to the previous year, a larger percentage of passengers has had expenses in the items of Vitis to monuments, Shopping, Excursion bought locally and Accommodation. The average expense in the several components is higher than in 2016 only in Monuments, Museums or Attractions, Transportation in the destination and the Excursion bought locally.