



SURVEY TO
INTERNATIONAL
CRUISE PASSENGERS

PORTO DE LISBOA

2015

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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 2015.

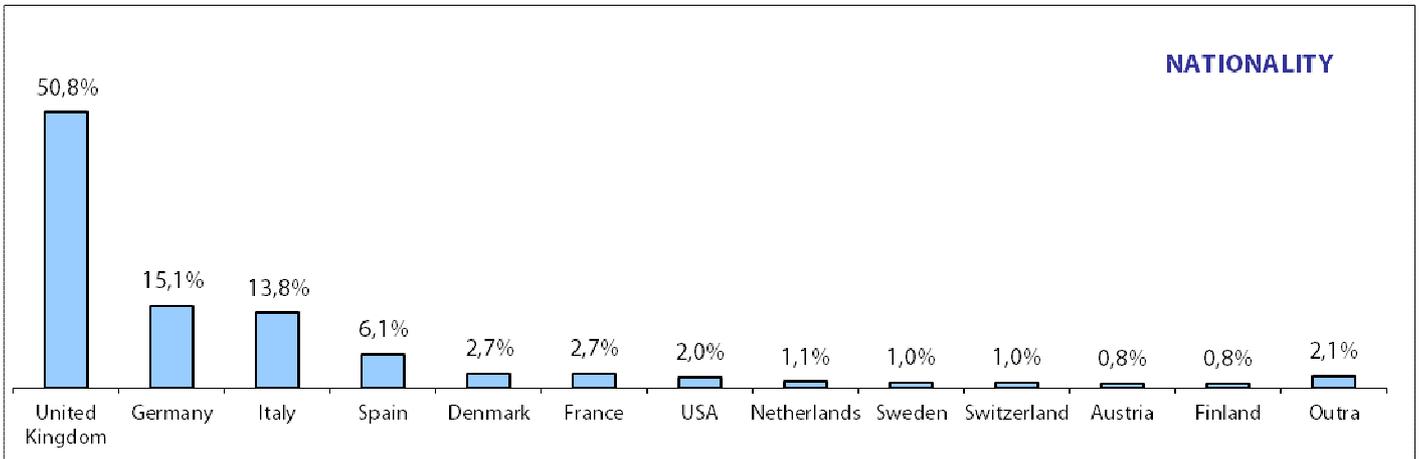
With this objective, a sample of 47 ships stopping in Lisbon between June and October was selected, where we were able to interview 1000 foreign passengers.

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

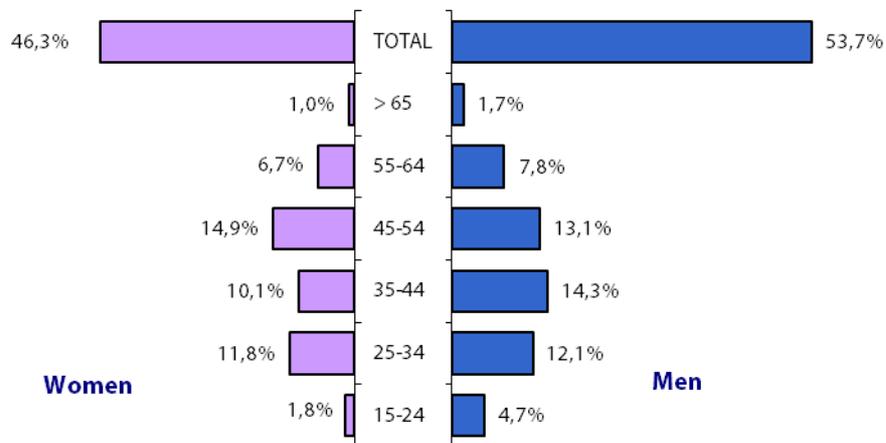
This report intends to be an analysis of the gathered data, highlighting the main results.

PROFILE

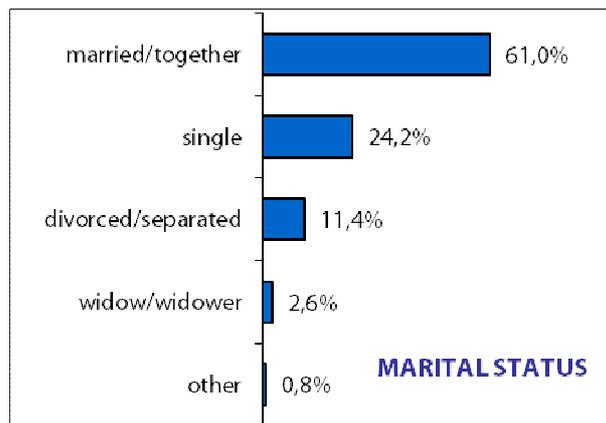
Similarly to previous years, in terms of nationality, 50,8% of the passengers interviewed are British (27,4% in 2014). The second place belongs again to Germany, with 15,1% (21,6% in 2014), and the third place to Italy with 13,8% (21,0% in 2014).



53,7% of the passengers is male (51,2% in 2014), most between 35 and 44 years old. In the case of women, the majority is between 45 and 54 years old. in 2013). The proportion of passengers with more than 65 years old was of 2,7% (quite lower than the 21,2% of 2014).

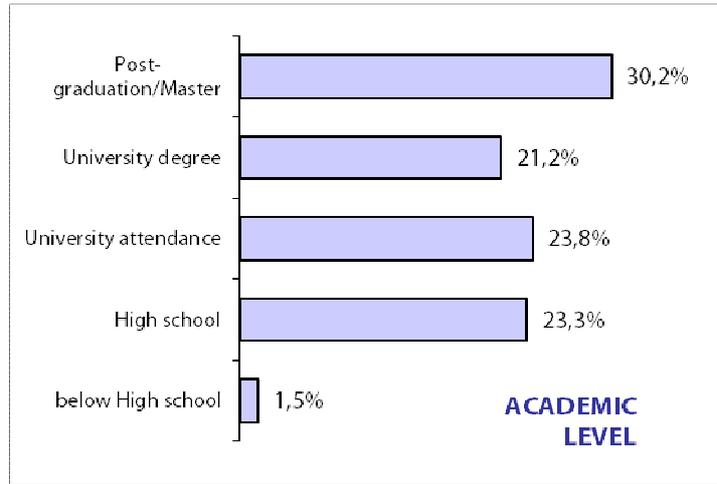


As in previous years, the large majority of the passengers is married or with a life partner.

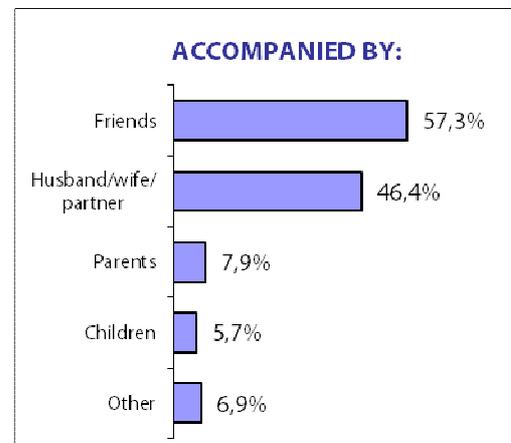


In what concerns the academic level, 51,4 of the passengers holds at least a university degree (51,0% in 2014).

Consistently with the age distribution, on this edition of the survey the weight of retired passengers is considerably lower than last year: 9,5% against 25,5% in 2014.

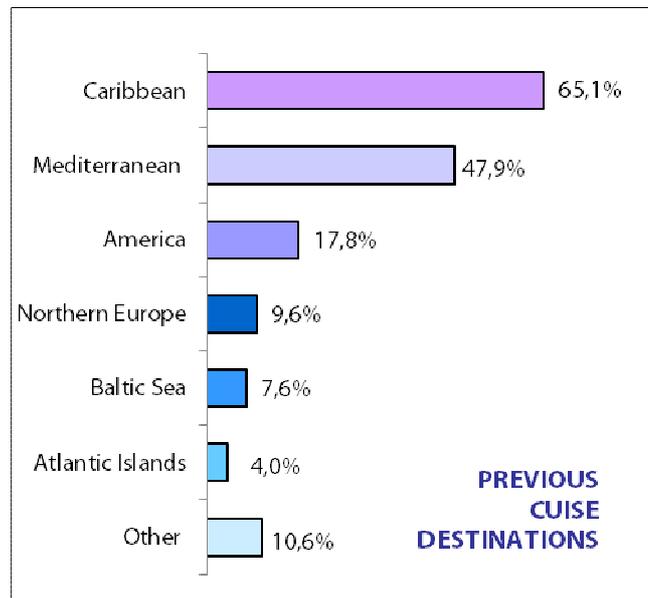
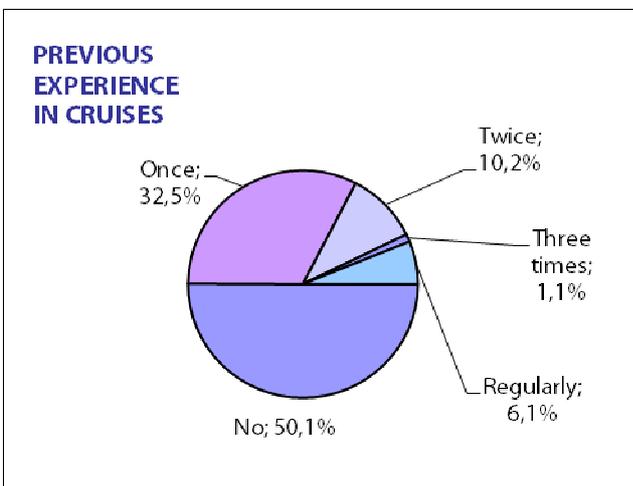


Similarly to last years, almost all the interviewed passengers travel accompanied (92,9% against 90,5% in 2014). The vast majority of those travels with their friends, while in 2014 most were with their wife/husband/partner. 20,8% travels only as a couple (32,1% in 2014), while 28,1% travels only with friends (20,1% in 2014).

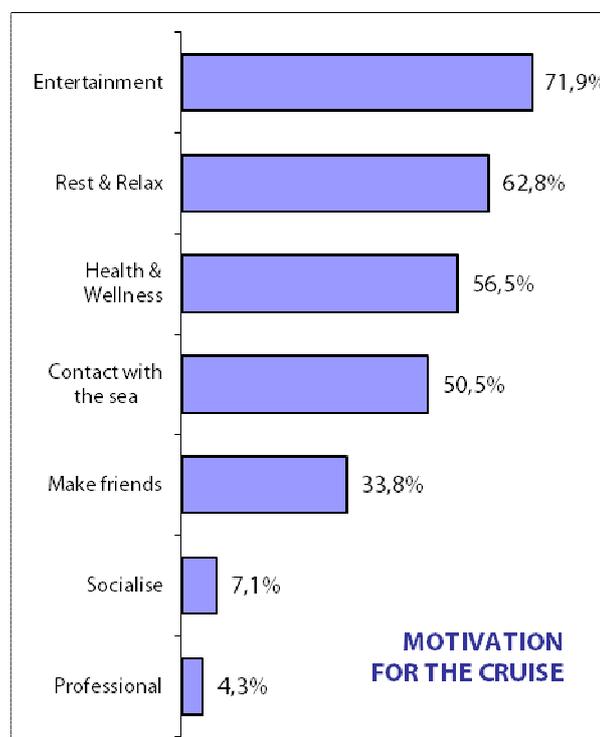
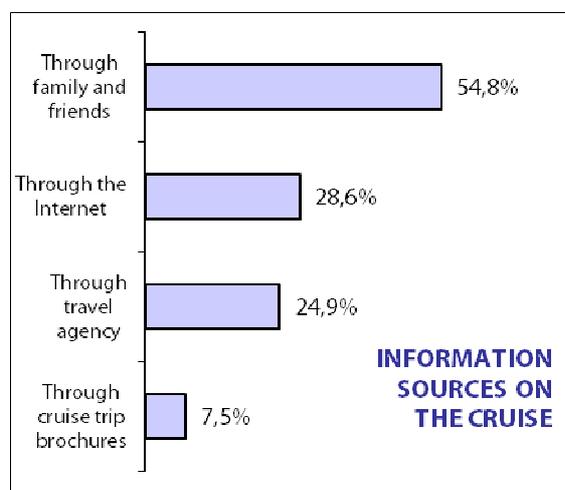


THE CRUISE

50,1% 86,8% of the passengers were on their first cruise (86,8% in 2014). On average, the cruises they were in had a duration of 12,8 days. 49,9% had had previous experience in this type of tourism (13,2% in 2014), and, of these, the majority chose the Caribbean or the Mediterranean as a destination.



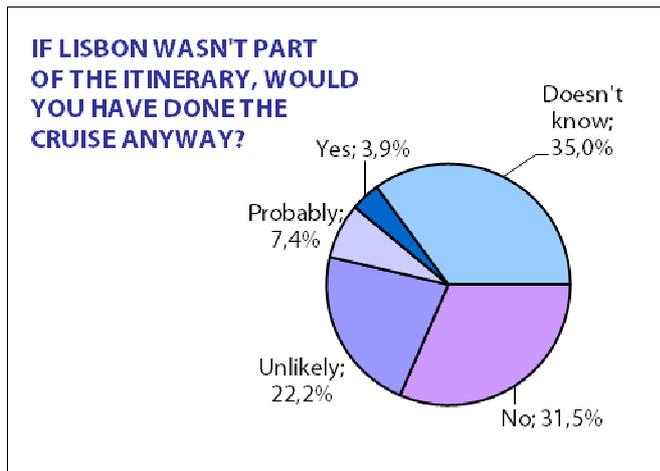
Contrary to last year, when the main source of information about the cruise was the Internet (40,7%), in 2015 the lead was taken by family and friends (21,9% in 2014).



The leisure element was the main reason for the interviewed passengers for doing a cruise (24,1% in 2014). In second place came the rest and relax (17,8% in 2014).

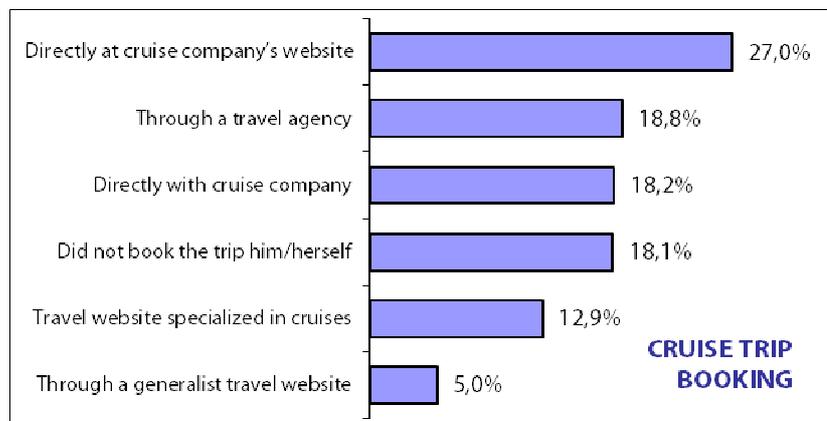
INFLUENCE WHEN CHOOSING THE CRUISE	not at all important	slightly important	very important
The cities present in the cruise itinerary	2,0%	20,9%	77,1%
The chance to visit Lisbon	1,9%	21,4%	76,7%
Possibility to rest on board	1,9%	34,4%	63,7%
Entertainment on board	2,1%	35,5%	62,4%
Quality of restaurants on board	2,9%	42,0%	55,1%
The price of the cruise trip	3,3%	42,7%	54,0%
Accommodation conditions on board	2,7%	47,6%	49,7%
Programs for single people	20,0%	46,4%	33,6%
Number of passengers on board	17,1%	51,3%	31,6%
The cruise company providing this cruise trip	35,2%	40,3%	24,5%
Travel agent's advice	53,7%	26,5%	19,8%
Previous cruise in other destinations	55,3%	25,8%	18,9%
A previous cruise trip calling Lisbon	68,8%	13,9%	17,3%

On a scale from 1 to 5, the factors that most influenced the decision to make this cruise were the ports of call included in the itinerary and the possibility of visiting Lisbon, inverting the positions from 2014. The resting conditions and the entertainment on board also assume some relevancy, repeating last year's positions.



22,2% of the interviewed passengers finds very unlikely having done the cruise if Lisbon was out of the itinerary, while 31,5% would definitely not have done it (in 2014, the percentages were, respectively of 31,7% and 26,7%).

The cruise trip booking was made, in the majority of cases, through the cruise company website (10,8% in 2014), while 18,8% booked the cruise through a travel agent (54,8% in 2014).



Evaluating the conditions on board the ship (on a scale from 1 to 10), Safety and navigation as well as the Ship's functionality and aesthetics come in first place. At the end, appears the Value for money.

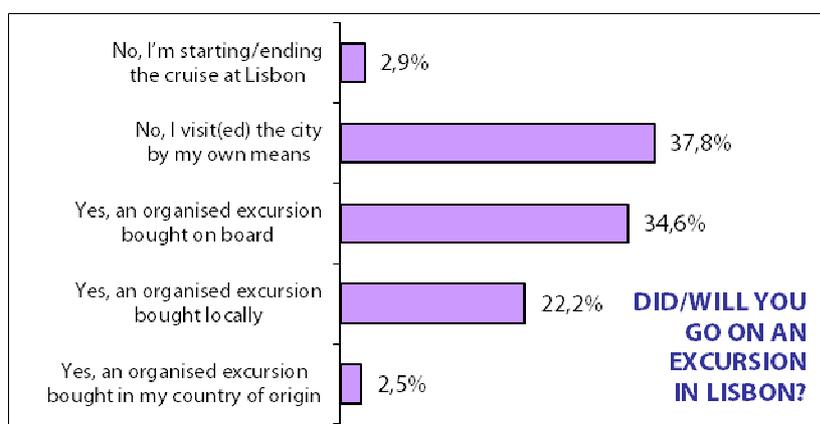
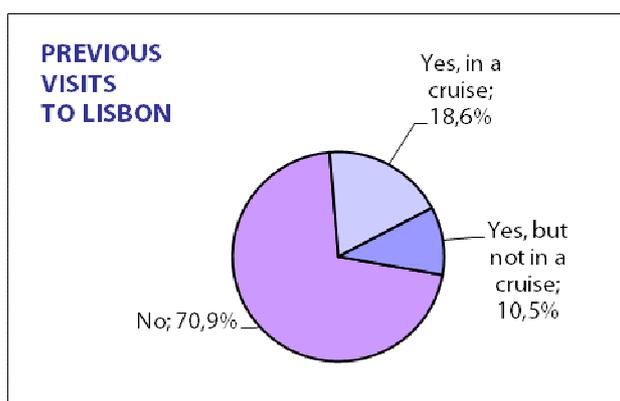
CONDITIONS ON BOARD THE SHIP	evaluation (from 1 to 10)
Safety and navigation	9,40
Ship's functionality and aesthetics	9,40
Services/facilities on board	9,36
Atmosphere on board	9,31
Animation and entertainment	9,31
Interaction with staff from the ship	9,23
Interaction with other passengers	9,21
Value for money	8,76

On a scale from 1 to 10, the average level of satisfaction with the Cruise was of 8,89 (9,64 in 2014).



THE VISIT TO LISBON

29,1% of the interviewed passengers had already visited Lisbon previously (43,0% in 2014). 18,6% did it in the context of a cruise trip (5,4% in 2014).

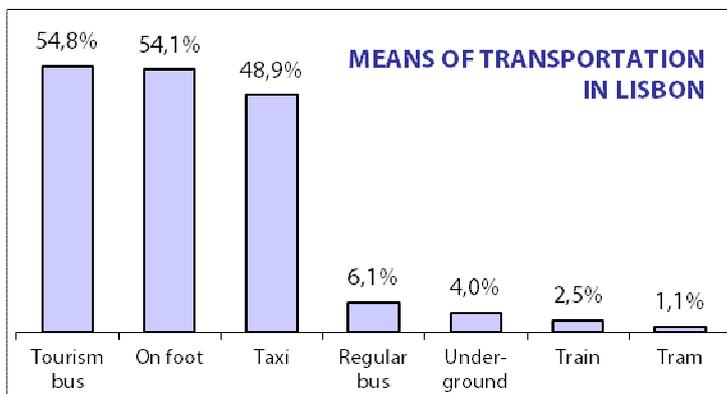


Same as last year, the majority of passengers opted for visiting the city on their own (44,1% in 2014). 22,2% preferred a guided tour in Lisbon bought locally (17,3% in 2014).

In 2015, the main sources of information on Lisbon was Friends or Family, Advertising and the information made available on the Ship, all holding top positions also in 2014. However, the Travel Agency, which stood in second drops now to 9th, and the E-mail, at the end of the chart in 2014, climbs to 7th.

SOURCES OF INFORMATION ON LISBON (level of use)	DK/DA	no use	little use	much use
Through Friends and family	1,0%	14,0%	12,5%	73,4%
Through advertising	1,0%	13,9%	17,8%	68,3%
In the ship	1,0%	6,1%	30,6%	63,3%
Through social media	1,0%	22,2%	16,5%	61,3%
Through other official websites	1,0%	21,5%	26,9%	51,6%
Through catalogues/ brochures	1,0%	12,4%	37,6%	50,0%
By email	1,0%	24,6%	33,0%	42,3%
Through www.visitlisboa.com website	1,0%	23,1%	39,5%	37,4%
Through a travel agent	1,0%	45,7%	23,0%	31,3%
Through the TV	1,0%	25,3%	47,0%	27,8%
Through press articles/news	1,0%	39,4%	33,8%	26,8%
Through books/ movies	1,0%	32,8%	41,5%	25,7%

While visiting Lisbon, most people got around by tourism bus or walking, the same as the previous year (53,2% and 35,2%, respectively) . The use of the underground continues to decrease: from 10,1% in 2014 to 4,0% in 2015.

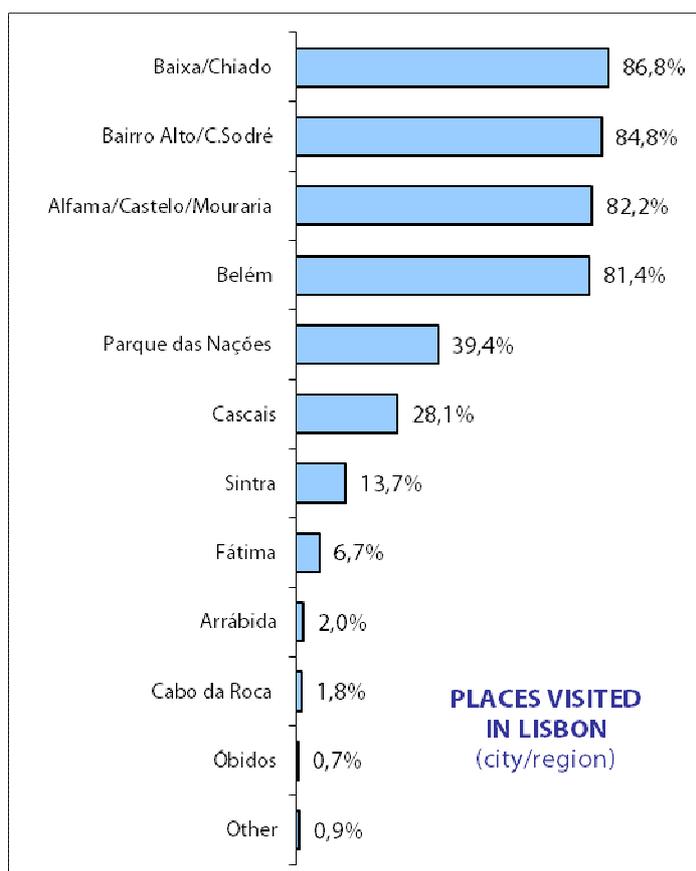


As in 2014, the most popular visited areas within Lisbon were Bairro Alto/ Cais do Sodré, Baixa-Chiado, and Alfama/Castelo/Mouraria. Belém rises from 68,8% in 2014 to 81,4%.

Within the Lisbon Region, Cascais and Sintra are the most visited (14,7% and 6,3% in 2014, respectively).

On average, these passengers spent 10:12 hours in Lisbon (9:32 in 2014).

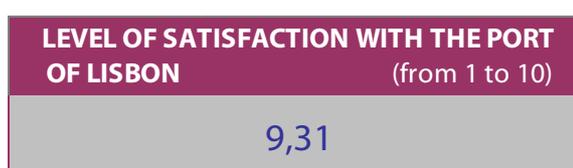
2,5% of the interviewed passengers spent the overnight in an hotel in Lisbon (0,5% in 2014)



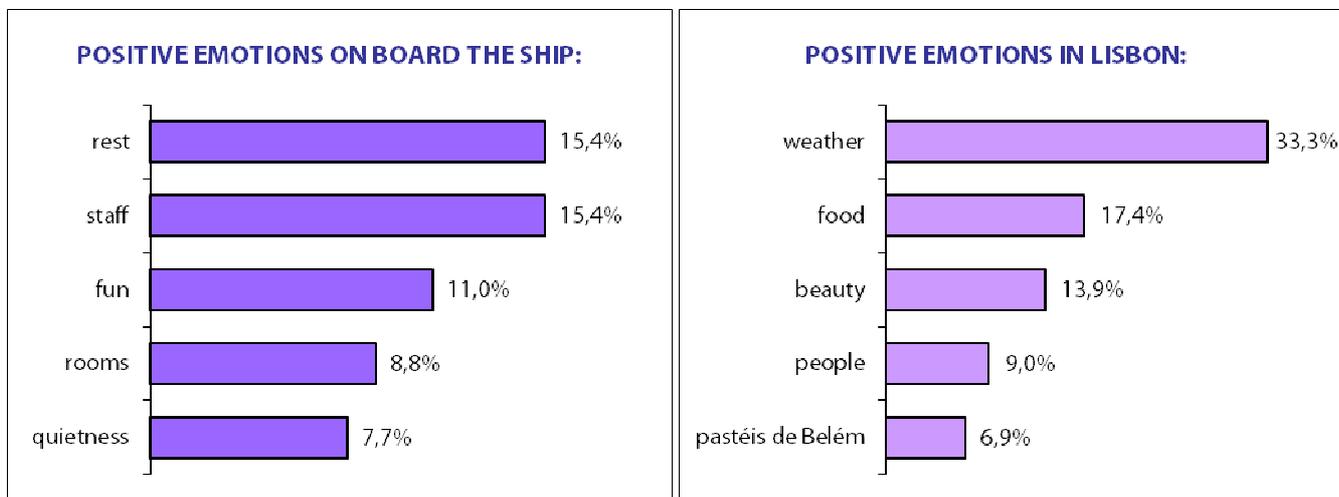
When asked about what they liked most in Lisbon, all the elements of the experience receive high evaluations, with the lead being the Weather and Gastronomy & Wine. In 2014, the top positions were held by Gastronomy & Wine, Service at restaurants and the Passenger welcoming services at the Port of Lisbon.

LISBON OFFER	evaluation (from 1 to 10)
Prices	9,36
Service at restaurants	9,33
Weather	9,31
Gastronomy and wines	9,27
Walking around the city	9,26
Quality of cultural offer	9,23
Monuments, churches and museums	9,15
Quality of commercial offer	9,10
Professional welcoming	9,09
Landscapes and urban environment	9,08
Interaction with other Lisbon visitors	9,04
Safety	9,00
Quality of welcoming services at Lisbon Port	8,91
Cleanliness	8,90
Interaction with local people	8,85
Fastness of embarking/disembarking formalities	8,85
Fastness accessing the city	8,82
Safety during embarking/disembarking	8,67
Quality of tourist information about Lisbon	8,65
Quality of the organized excursion in Lisbon	8,59
Access to tourist information about Lisbon	8,55

In what concerns the level of satisfaction with services at the Port of Lisbon, the average value was of 9,31, on a scale from 1 to 10 (9,64 in 2014)..



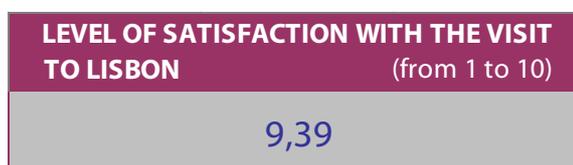
When questioned about the most relevant positive emotions they got from this trip, the most frequente answers were the following:



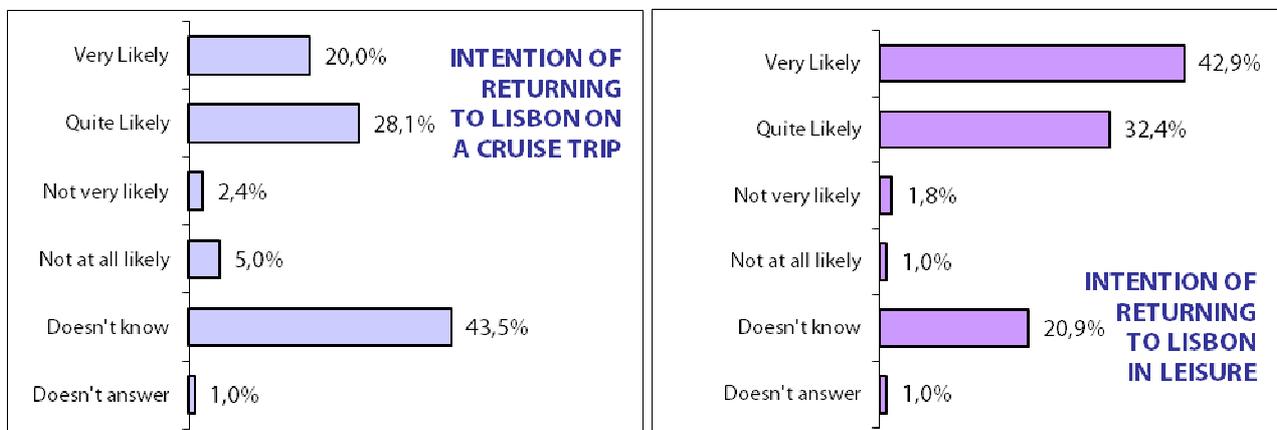
Regarding the expectation previous to their visit to Lisbon, 67,8% of the interviewed passengers saw their expectations exceeded (83,1% in 2014).



On a scale from 1 to 10, the average level of satisfaction with the visit to Lisbon was of 9,39 (9,63 in 2014).



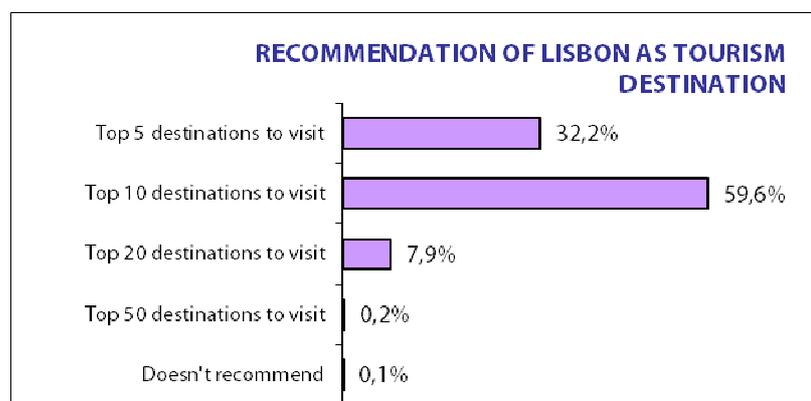
48,1% of the passengers considers the return to Lisbon in a cruise trip as likely or very likely, (94,5% in 2014), while 75,3% has the same evaluation of their return to the city in leisure and outside the context of a cruise (95,7% in 2014).



99,7% of the interviewed passengers recommend Lisbon as a port of call. For the recommendation of Lisbon as a global tourism destination that percentage was 99,8%. In 2014, this values were 98,4% and 99,7%, respectively.



In what concerns their recommendation as a tourism destination, 32,2% of these cruise passengers places Lisbon in the Top 5 destinations to be visited (58,5% in 2014), while 59,6% include Lisbon in the Top 10



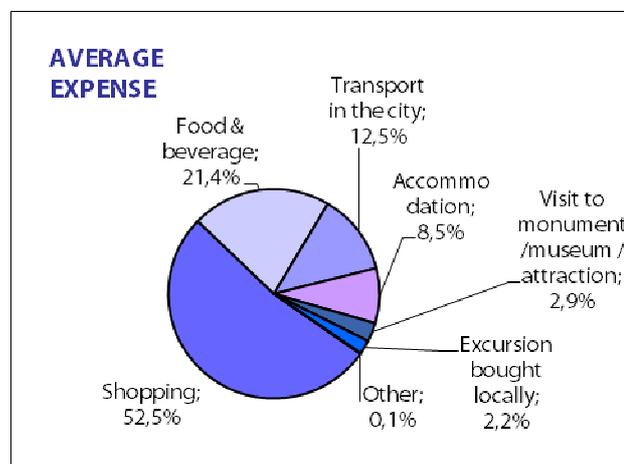
EXPENSES

On average, the interviewed cruise passengers had a daily individual expense of **130,28 euros** during their visit to Lisbon (183,49 euros in 2014). The components of this expense had, on average, the following distributions:

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

Thus, it was possible to draw the following information: 4,7% said they have had expenses while visiting Monuments, Museums or Attractions, in an average value of 25,31 euros.

25,0% of the passengers indicated having spent money on Shopping - 85,85 euros per person on average. 26,3% had expenses on Food & Beverage in the amount of 33,21 euros. 17,2% spent money in Transportation while in Lisbon, with an average value of 29,75 euros. 3,3% says to have bought an excursion in Lisbon, with an average value of 27,05 euros. And the 2,1% who had accommodation expenses, the average value was of 165,79 euros.



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	4,7%	25,31 €
Shopping	25,0%	85,85 €
Food & beverage	26,3%	33,21 €
Transport in the city	17,2%	29,75 €
Excursion bought locally	3,3%	27,05 €
Accommodation	2,1%	165,79 €
Other	0,2%	15,00 €

Comparing with the previous year, even though with different percentages, all the items had higher values than in 2014: Monuments, Museums or Attractions - 29,76 euros per person; Shopping - 105,30 euros per person; Food & Beverage - 45,81 euros; Transportation while in Lisbon - 28,71 euros and Accommodation - 178,13 euros.