



SURVEY TO CRUISE PASSENGERS

PORTO DE LISBOA

2016

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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 2016.

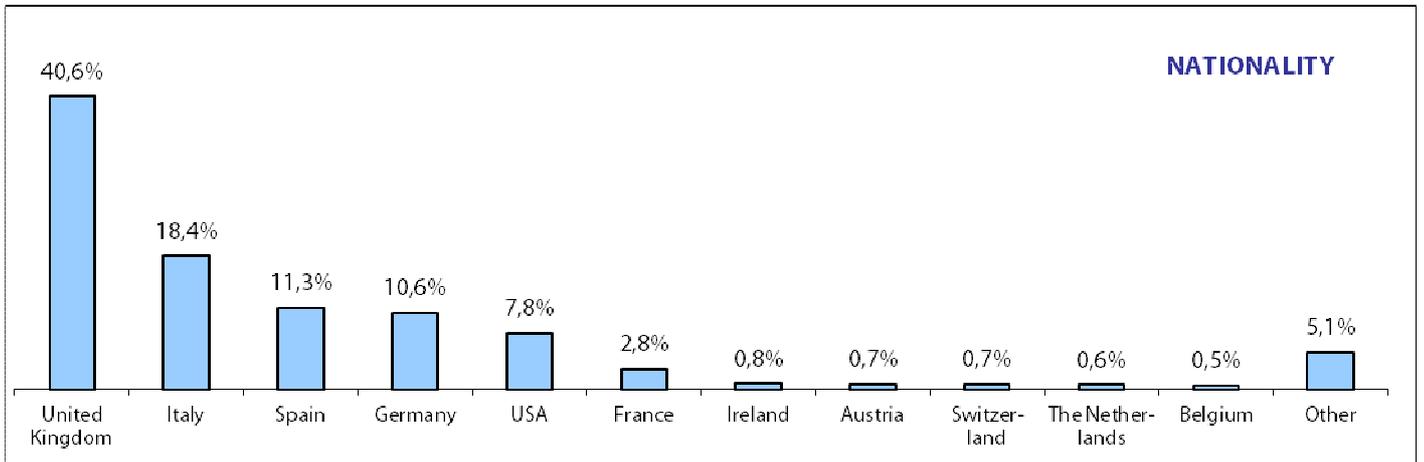
With this objective, a sample of 52 ships stopping in Lisbon between April and November was selected, where we were able to interview 998 foreign passengers.

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

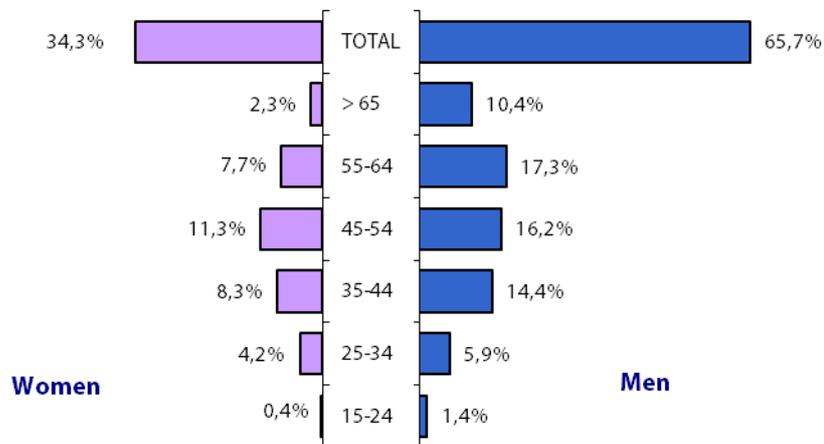
This report intends to be an analysis of the gathered data, highlighting the main results.

PROFILE

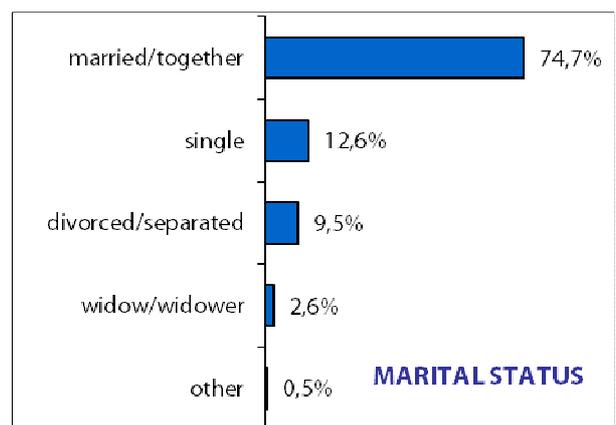
Similarly to previous years, in terms of nationality, 40,6% of the passengers interviewed are British (50,8% in 2015). The second place belongs again to Italy (13,8% in 2015), and the third place to Spain (6,1% in 2015).



65,7% of the passengers is male (53,7% in 2015). In terms of age group, 50,3% is between 35 and 44 years old, 37,8% is above 55 and 11,9% below 35. In 2015, those percentages were, respectively, 52,4%, 17,2% and 30,4%.

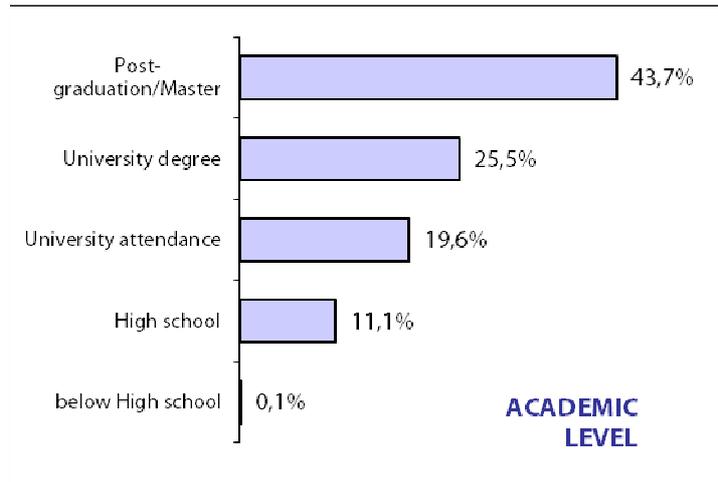


As in previous years, the large majority of the passengers is married or with a life partner (61,0% in 2015).

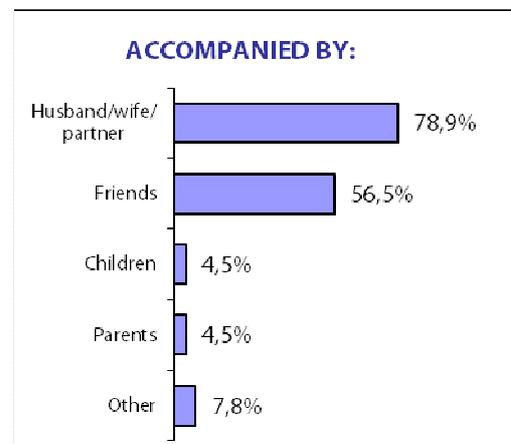


In what concerns the academic level, 69,1% of the passengers holds at least a university degree (51,4% in 2015).

The weight of retired passengers was Of 12,0% (9,5% in 2015).

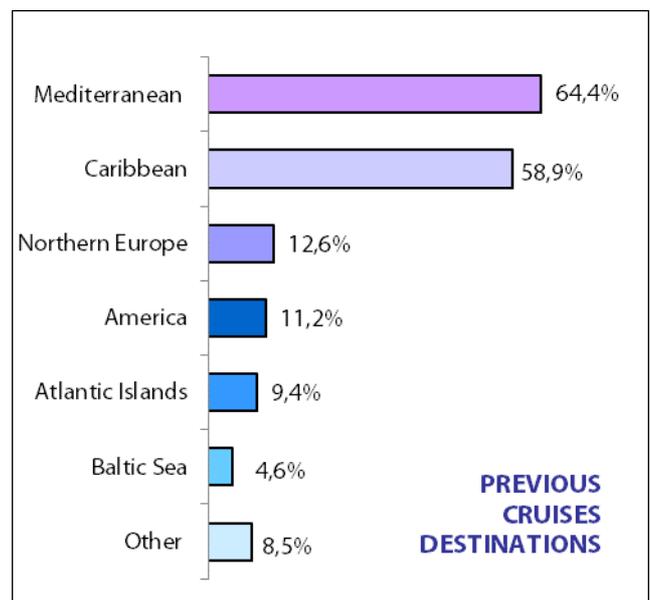
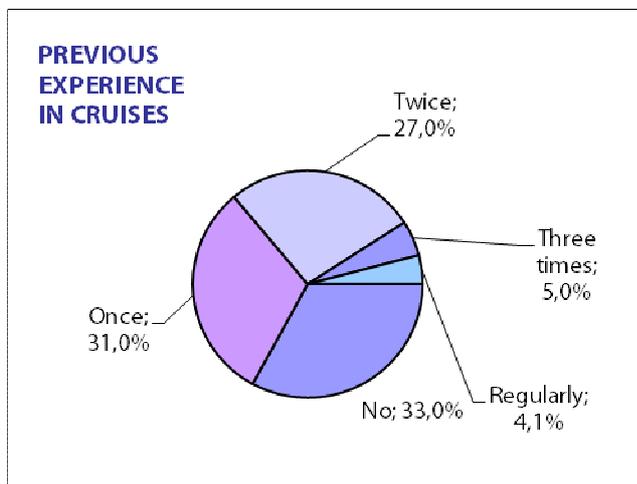


As has usually been the case, the strong majority of the interviewed passengers travels accompanied (98,1% against 92,9% in 2015). Most of those, travels with their wife/husband/partner, while in 2015 the majority chose the company of friends. 28,1% travels only as a couple (20,8% in 2015), while 12,8% travels only with friends (28,1% in 2015).

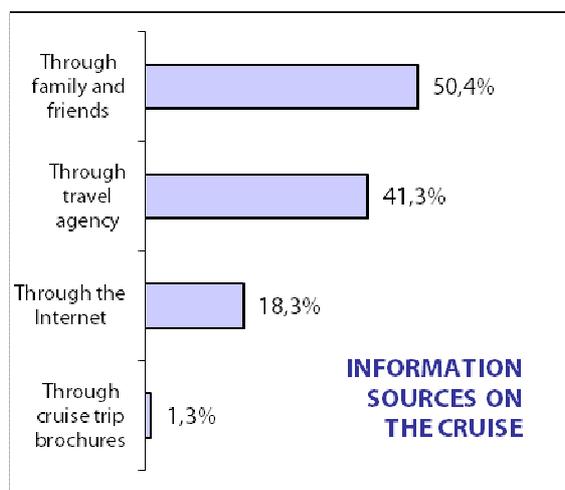


THE CRUISE

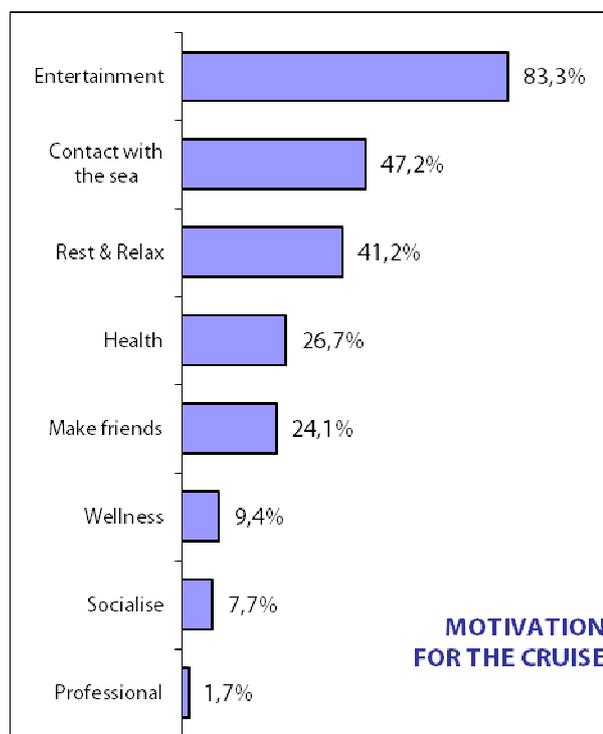
33,0% dos of the passengers were on their first cruise (50,1% in 2015). On average, the cruises they were in had a duration of 12,6 days. 67,0% had had previous experience in this type of tourism (49,9% in 2015), and, of these, the majority chose the Mediterranean or the Caribbean as a destination.



Similarly to last year, when the main source of information about the cruise was the family and friends (54,8% in 2015). In second place came the travel agency (only 24,9% in 2015).

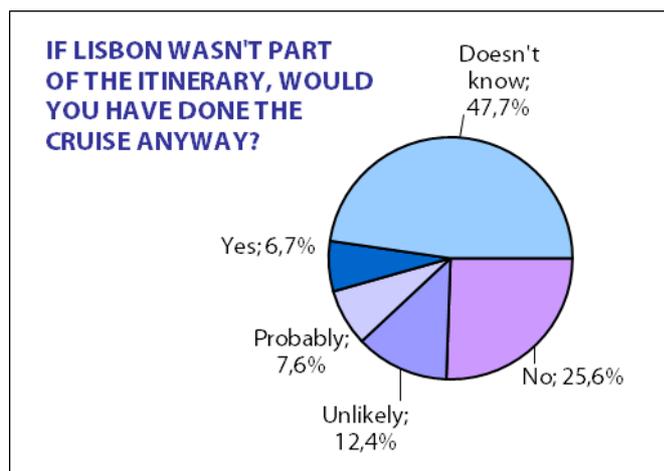


The Leisure element was the main reason for the interviewed passengers for doing a cruise (71,9% in 2015). In second place came the Contact with the sea and Rest and relax.



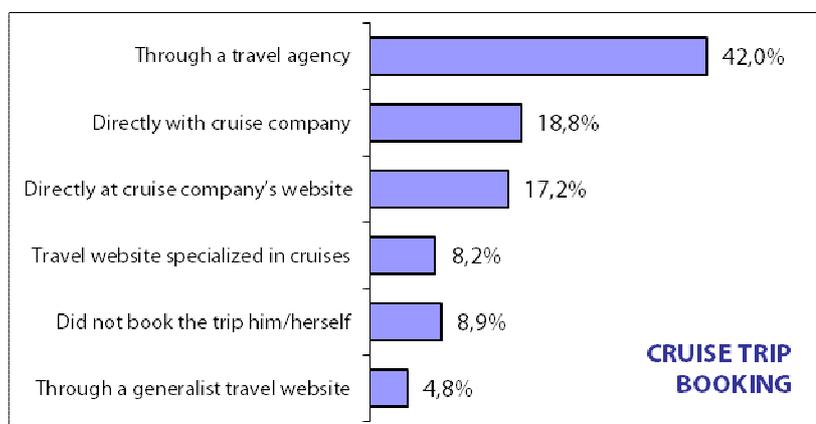
INFLUENCE WHEN CHOOSING THE CRUISE	not at all important	slightly important	very important
The cities present in the cruise itinerary	4,4%	39,0%	56,6%
The chance to visit Lisbon	12,2%	38,4%	49,4%
Possibility to rest on board	13,6%	54,2%	32,2%
The price of the cruise trip	14,2%	54,3%	31,5%
Entertainment on board	13,2%	61,3%	25,5%
Accommodation conditions on board	14,9%	70,8%	14,2%
Quality of restaurants on board	15,8%	69,9%	14,2%
Programs for single people	39,6%	49,1%	11,3%
Number of passengers on board	35,5%	54,4%	10,1%
The cruise company providing this cruise trip	53,9%	36,0%	10,1%
Travel agent's advice	53,3%	39,1%	7,6%
Previous cruise in other destinations	61,5%	31,3%	7,2%
A previous cruise trip calling Lisbon	69,5%	25,5%	5,0%

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, the same as in 2015 (in 2015, 77,1% and 76,7%, respectively, classified that influence as very important). The resting conditions and the price of the cruise also assume some relevancy.



12,4% of the interviewed passengers finds very unlikely having done the cruise if Lisbon was out of the itinerary, while 25,6% would definitely not have done it (in 2015, the percentages were, respectively of 22,2% and 31,5%).

The cruise trip booking was made, in the majority of cases, through a travel agent (18,8% in 2015), while 18,8% booked the cruise directly with the cruise company (18,2% in 2015).



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 again in first place. At the end, appears the Interaction with other passengers.

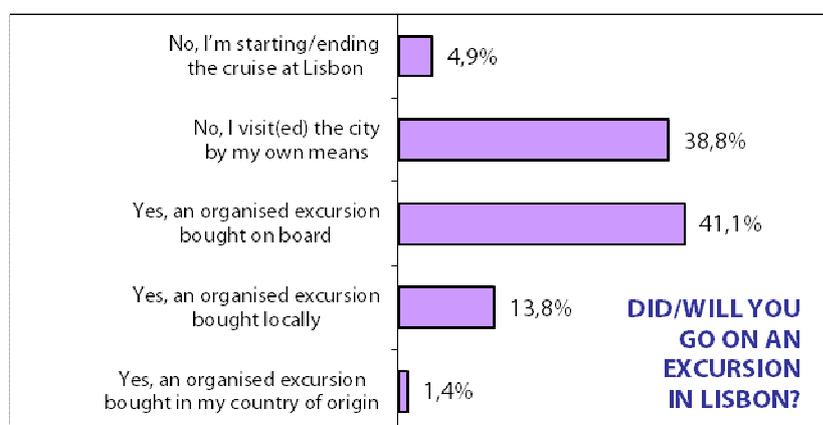
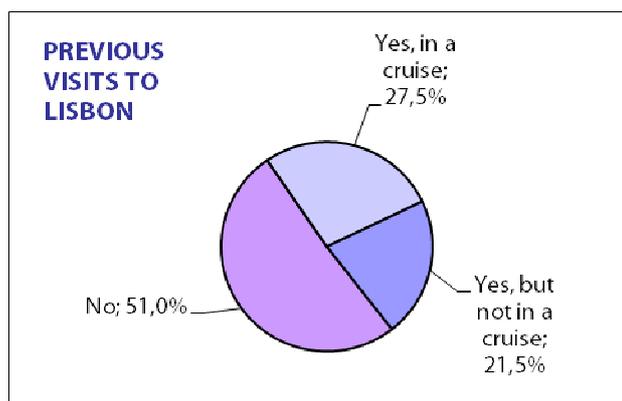
CONDITIONS ON BOARD THE SHIP	evaluation (from 1 to 10)
Safety and navigation	8,84
Ship's functionality and aesthetics	8,70
Atmosphere on board	8,69
Animation and entertainment	8,54
Services/facilities on board	8,54
Interaction with staff from the ship	8,49
Value for money	8,44
Interaction with other passengers	8,41

On a scale from 1 to 10, the average level of satisfaction with the Cruise was of 8,29 (8,89 in 2015).



THE VISIT TO LISBON

49,0% of the interviewed passengers had already visited Lisbon previously (29,1% in 2015). 27,5% did it in the context of a cruise trip (18,6% in 2015).

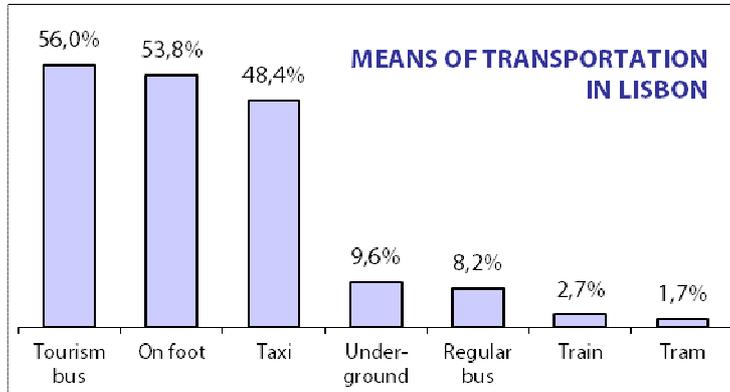


While last year the majority of passengers opted for visiting the city on their own (37,8%), in 2016 most chose to do a guided tour in Lisbon bought on board the ship (34,6% in 2015).

In 2015, the main sources of information on Lisbon were Friends or Family, the information made available on the Ship and the Social media. All of these held top positions also in 2015, with Advertising, now in fourth, coming in second place. At the bottom, came Books/movies and Press articles/news.

SOURCES OF INFORMATION ON LISBON (level of use)	DK/DA	no use	little use	much use
Through Friends and family	0,9%	30,8%	22,5%	45,8%
In the ship	0,9%	10,6%	43,2%	45,3%
Through social media	0,9%	43,1%	13,6%	42,4%
Through advertising	0,9%	34,8%	29,1%	35,3%
Through other official websites	0,9%	39,0%	30,0%	30,2%
Through catalogues/ brochures	0,9%	38,1%	37,0%	24,0%
By email	0,9%	48,8%	27,0%	23,3%
Through the TV	0,9%	33,2%	49,3%	16,6%
Through www.visitlisboa.com website	0,9%	48,5%	38,0%	12,6%
Through a travel agent	0,9%	43,9%	47,9%	7,3%
Through books/ movies	0,9%	51,7%	41,2%	6,2%
Through press articles/news	0,9%	49,9%	44,2%	5,0%

While visiting Lisbon, most people got around by tourism bus or walking, the same as in the previous year (54,8% and 54,1%, respectively) . The use of the underground increased from 2015: from 4,0% to 9,6% in 2016.

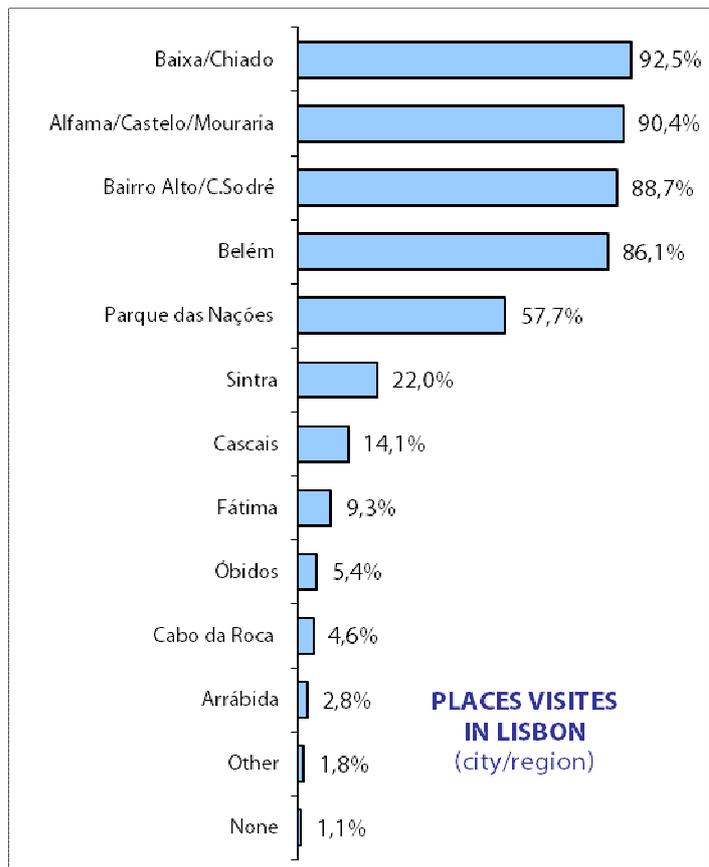


As in 2015, the most popular visited areas within Lisbon were Baixa-Chiado, Alfama/Castelo/Mouraria e o Bairro Alto /Cais do Sodré (the latter inverting the positions occupied last year).

Within the Lisbon Region, Sintra tops Cascais as the most visited (13,7% and 28,1% in 2015, respectively).

On average, these passengers spent 11:21 hours in Lisbon (10:12 in 2015).

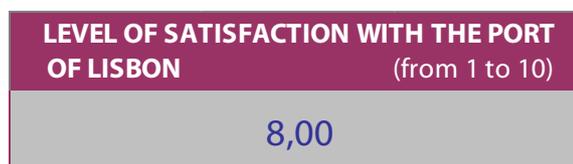
5,1% of the interviewed passengers spent the overnight in an hotel in Lisbon (2,5% in 2015).



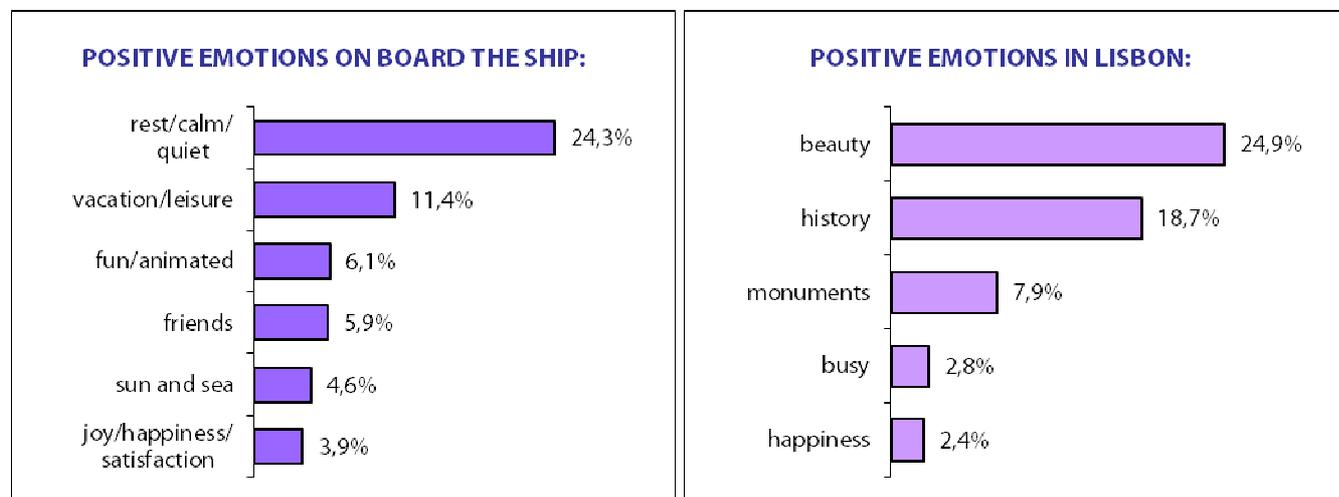
When asked about what they liked most in Lisbon, all the elements of the experience receive high evaluations, with the lead being the Weather, Walking around the city, the Prices and Gastronomy & Wine. In 2015, the top positions were held by Prices, Service at restaurants, the Weather and Gastronomy & Wine.

LISBON OFFER	evaluation (from 1 to 10)
Weather	9,19
Walking around the city	9,07
Prices	8,80
Gastronomy and wines	8,79
Monuments, churches and museums	8,77
Cleanliness	8,73
Safety	8,73
Service at restaurants	8,69
Quality of cultural offer	8,55
Landscapes and urban environment	8,52
Quality of commercial offer	8,48
Professional welcoming	8,34
Interaction with other Lisbon visitors	8,14
Fastness of embarking/disembarking formalities	8,14
Fastness accessing the city	8,09
Safety during embarking/disembarking	8,09
Quality of welcoming services at Lisbon Port	8,07
Interaction with local people	8,00
Quality of the organized excursion in Lisbon	7,97
Quality of tourist information about Lisbon	7,81
Access to tourist information about Lisbon	7,75

In what concerns the level of satisfaction with services at the Port of Lisbon, the average value was of 8, on a scale from 1 to 10 (9,31 in 2015).

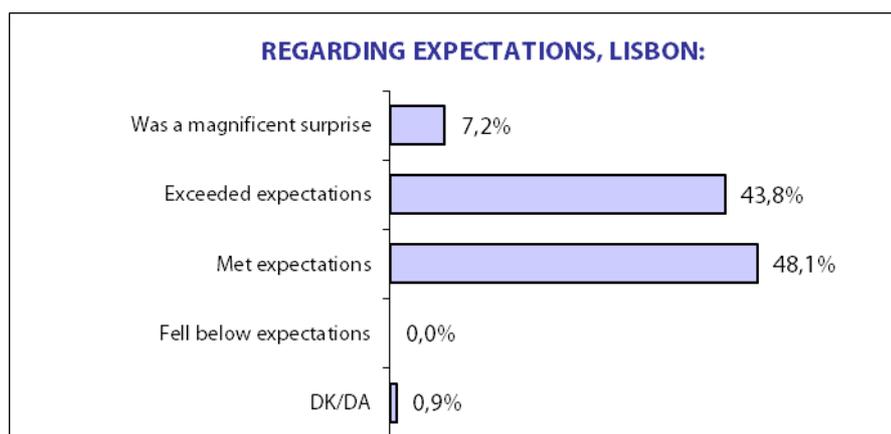


When questioned about the most relevant positive emotions they got from this trip, the most frequent answers were the following:

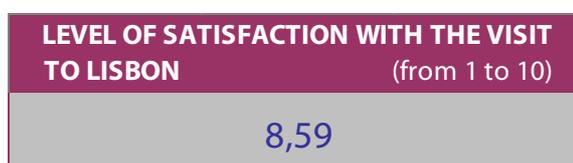


On the opposite end, noise was mentioned by 1,0% of the interviewed passengers as the sole negative aspect of their visit to Lisbon.

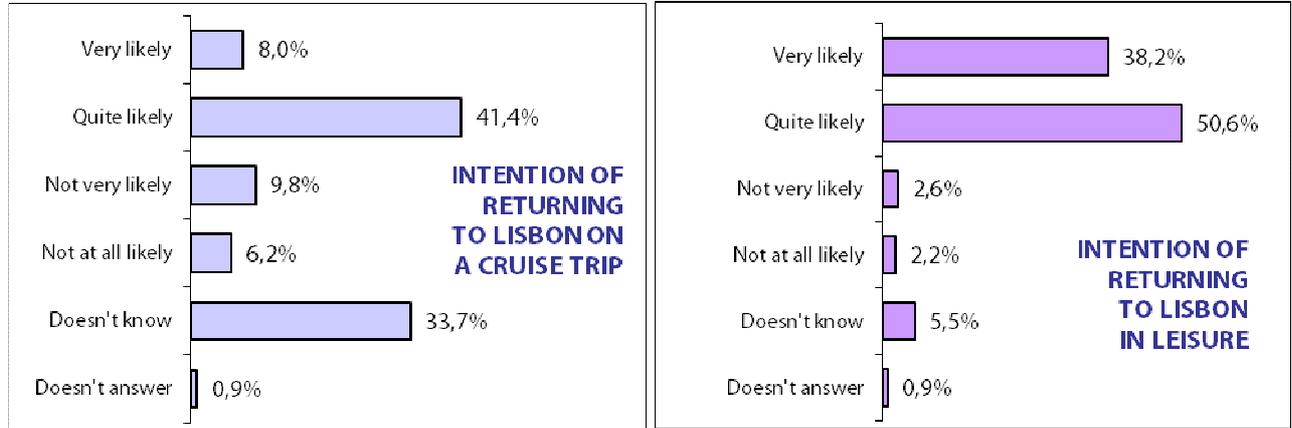
Regarding the expectation previous to their visit to Lisbon, 51,0% of these passengers saw their expectations exceeded (67,8% in 2015).



On a scale from 1 to 10, the average level of satisfaction with the visit to Lisbon was of 8,59 (9,39 in 2015).



49,4% of the passengers considers the return to Lisbon in a cruise trip as likely or very likely, (48,1% in 2015), while 88,8% has the same evaluation of their return to the city in leisure and outside the context of a cruise (75,3% in 2015).



All the interviewed passengers recommend Lisbon as a port of call, as well as a global tourism destination. In 2015, these values were 99,7% and 99,8%, respectively.



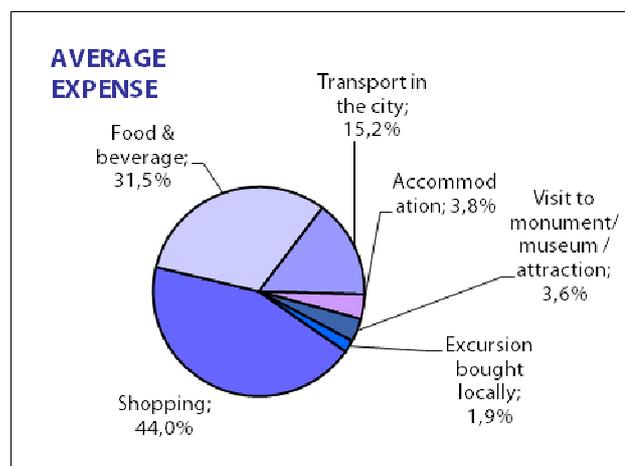
In what concerns their recommendation as a tourism destination, 12,2% of these cruise passengers places Lisbon in the Top 5 destinations to be visited (32,2% in 2015), while 81,3% include Lisbon in the Top 10 (59,6% in 2015).



EXPENSES

On average, the interviewed cruise passengers had a daily individual expense of **56,80 euros** during their visit to Lisbon (130,28 euros in 2015). One should take into consideration when comparing to last year, that the sample of interviewed passengers is a little bit older, travels mostly as a couple and not with a group of friends and booked their trip mostly through a travel agent, which may reflect lesser extra expenses outside their cruise package.

In 2016, 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.

According to the data, 13,0% said they have had expenses while visiting Monuments, Museums or Attractions (4,7% in 2015), 43,9% of the passengers indicated having spent money on Shopping (25,0% in 2015), 45,8% had expenses on Food & Beverage (26,3% in 2015), 41,0% spent money in Transportation while in Lisbon (17,2% in 2015), e 2,6% says to have bought an excursion in Lisbon (3,3% in 2015). And finally, 1,4% had accommodation expenses (2,1% in 2015).

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	13,0%	9,33 €
Shopping	43,9%	34,24 €
Food & beverage	45,8%	23,48 €
Transport in the city	41,0%	12,65 €
Excursion bought locally	2,6%	24,90 €
Accommodation	1,4%	93,04 €
Other	0,0%	n.a.

On average, the individual amounts spent in each component were as follows: Monuments, Museums or Attractions - 9,33 euros (25,31 euros in 2015); Shopping - 34,24 euros (85,85 euros in 2015); Food & Beverage - 23,48 euros (33,21 euros in 2015); Transportation in Lisbon - 12,65 euros (29,75 euros in 2015), Excursion bought locally - 24,90 euros (27,05 euros in 2015) e Accommodation - 93,04 (165,79 euros in 2015).

Although in comparison to the previous year a larger percentage of passengers said to have had expenses while in Lisbon, the average amount spent in each item was lower than in 2015. Thus originating a decrease, from last year's edition of this survey, in the average individual amount spent.