



SURVEY TO
INTERNATIONAL
CRUISE PASSENGERS

PORTO DE LISBOA

2011

SURVEY TO INTERNATIONAL 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 international cruise passenger, a new edition was carried out in 2011, also with the purpose of evaluating the level of satisfaction with the visit to Lisbon.

With this objective, a sample of 48 ships stopping in Lisbon between May and November was selected, where we were able to interview 995 passengers.

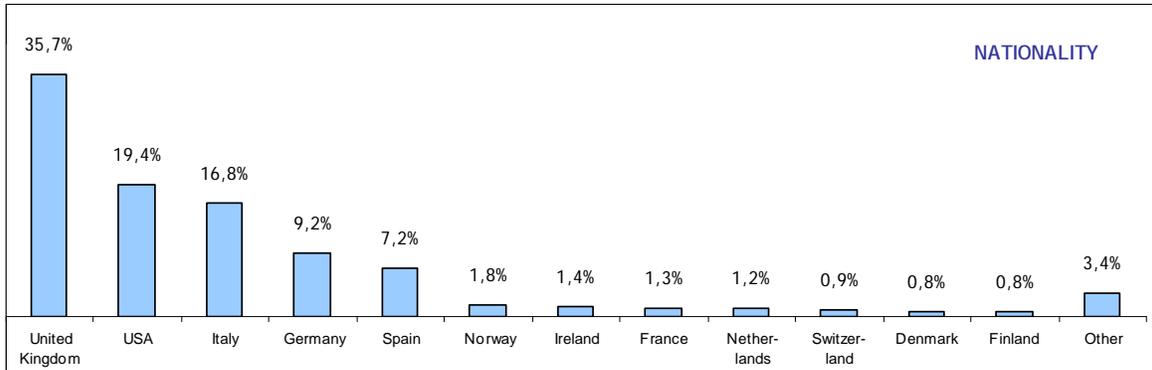
Based on a questionnaire designed by the Observatório do Turismo de Lisboa, the interviews were conducted by the company 2ii - Informática e Informação, Lda.

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

MAIN RESULTS

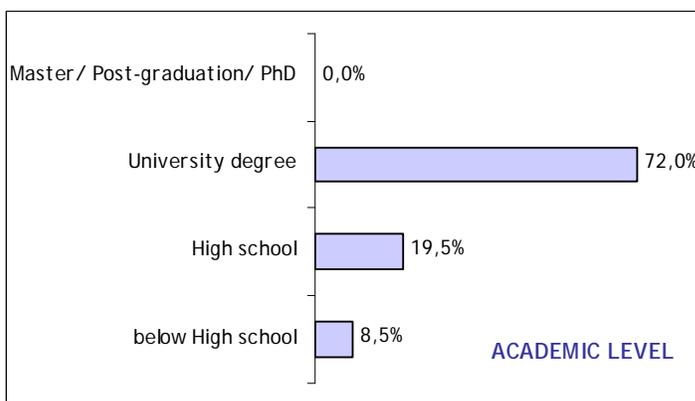
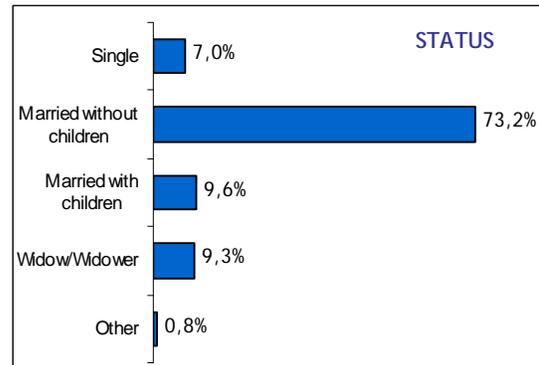
PROFILE

Regarding their nationality, 35,7% of the passengers interviewed are British (61,8% in 2010). The second place, at a large distance, belongs to the United States (third in 2010 with 10,4%), while third place went to Italy (6,3% in 2010).



56,4% of the passengers is male (58,7% in 2010) with an average age of 57,5 years old (56,6 in 2010); 52,3 years old in the case women (57,7 in 2010); and 55,3 globally (57,7 in 2010). The proportion of passengers with more than 65 years old, 28,5%, was almost identical to last year's (28,9%).

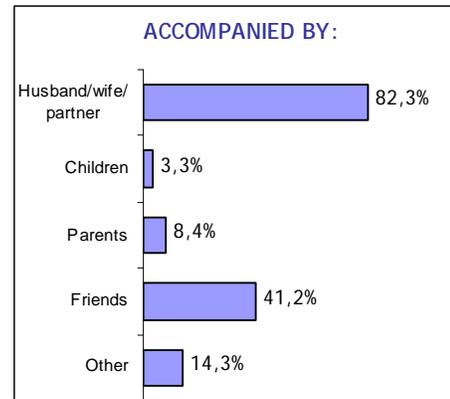
As well as in previous years, the large majority of the passengers is married with no children.



In what concerns the academic level, 72,0% of the passengers holds at least a university degree (92,3% in 2010).

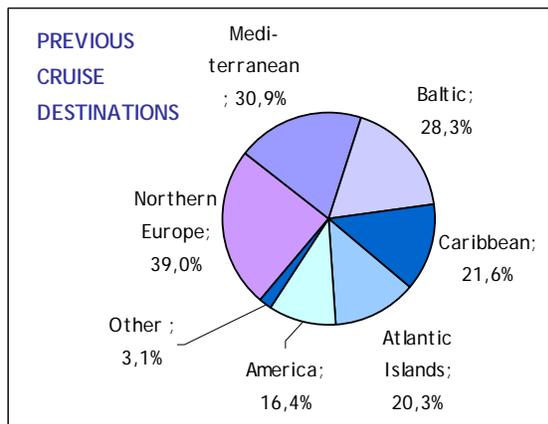
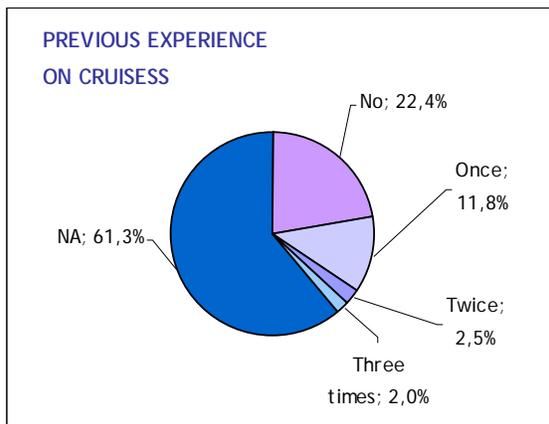
Comparing with last year, the percentage of retired people among the passengers has lightly decreased from 48,8% to 31,9% in 2011.

Similarly to last years, almost all the interviewed passengers travel accompanied (98,8% against 99,0% in 2010). The majority of those travels with their wife/husband/partner. 43,2% travels only as a couple (89,2% in 2010), while 8,4% travels only with friends (33,7% in 2010).

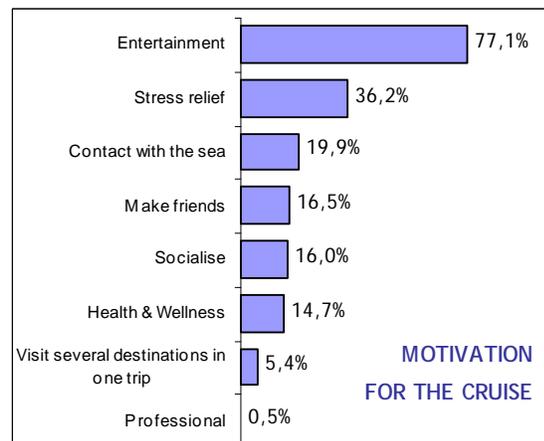
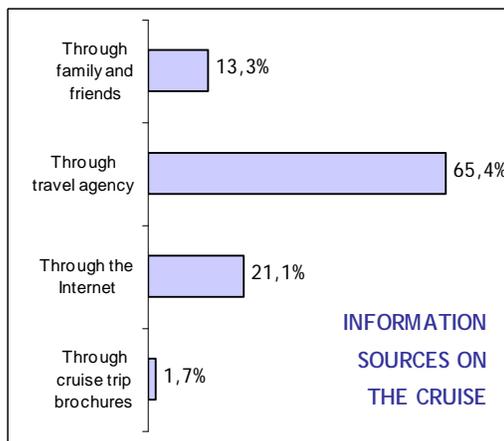


THE CRUISE

61,3% of the passengers were on their first cruise (37,1% in 2010), while 38,7% had a previous experience in this type of tourism (61,3% in 2010). Of these latter, more than a half chose Northern Europe as a destination, followed by the Mediterranean.



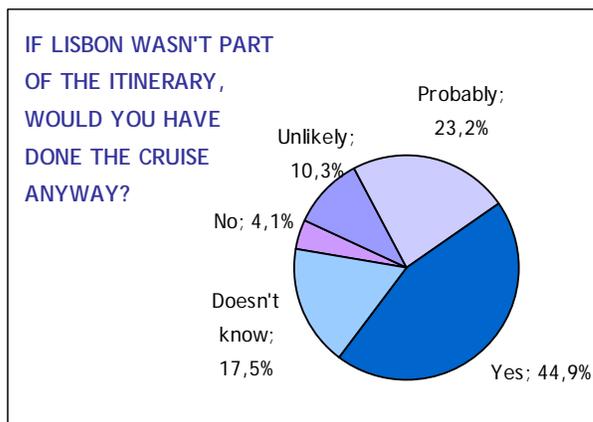
The main source of information about the cruise was Travel Agencies, followed by Internet, which surpassed Friends and/or Family. In 2010, the percentages were 53,0%, 17,8% and 27,8%, respectively.



According to the large majority of the interviewed passengers, leisure was the main purpose for this cruise. The decrease in its importance from last year (92,7%) was accompanied by an increase in the motivation of stress relief, which went from 20,8% in 2010 to 36,2% in 2011.

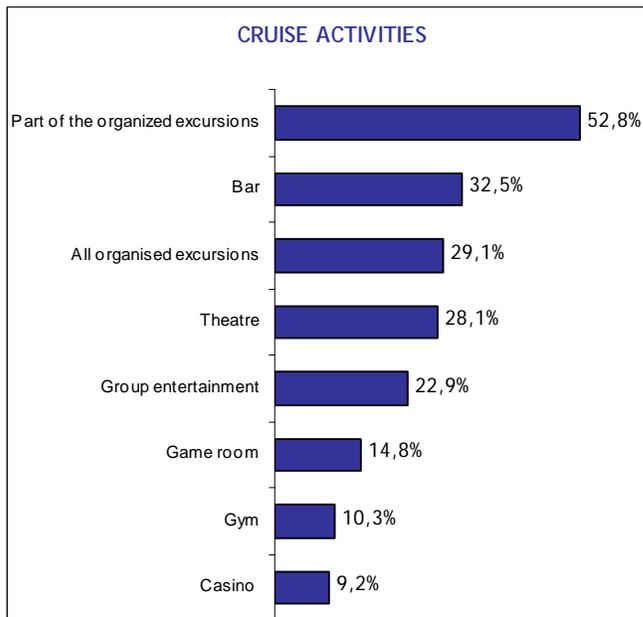
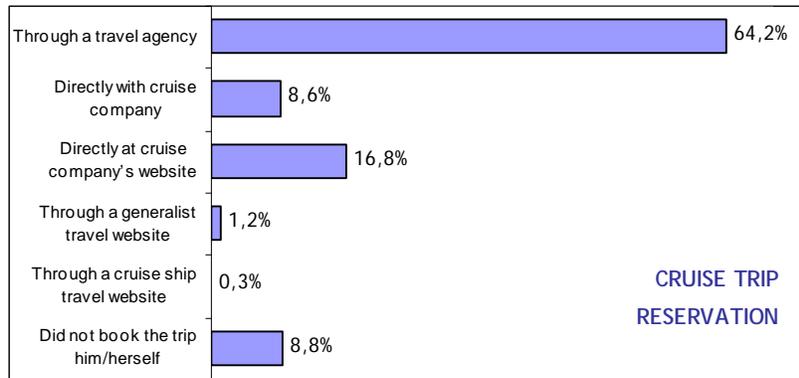
INFLUENCE WHEN CHOOSING THE CRUISE (1 - not important at all; 5 - extremely important)	average
Resting conditions on board	4,27
Lodging conditions on board	4,25
The quality of restaurants on board	4,24
The ports of call itinerary	4,24
Entertainment on board	4,20
The price of the cruise	4,13
The cruise company	4,11
The possibility of visiting Lisbon	3,99
Travel agency advice	3,81
Previous cruises in the same destination	3,47
Programmes for single people	3,45
Number of passengers	3,42
Previous cruises in other destinations	3,38

On a scale from 1 to 5, the factor that most influenced the decision to make this cruise were the resting conditions and the lodging conditions on board (same as last year, but in reversed positions). The quality of restaurants on board and the ports of call in the itinerary were also relevant aspects (the latter having been in third place in 2010).



10,3% of the interviewed passengers finds very unlikely having done the cruise if Lisbon was out of the itinerary, while 4,1% would definitely not have done it (in 2010, the percentages were, respectively, of 39,3% and 12,6%).

Mostly, the cruise trip reservation, was made through a travel agent (same percentage as in 2010). 16,8% booked the cruise through the cruise company website (5,9% in 2010).



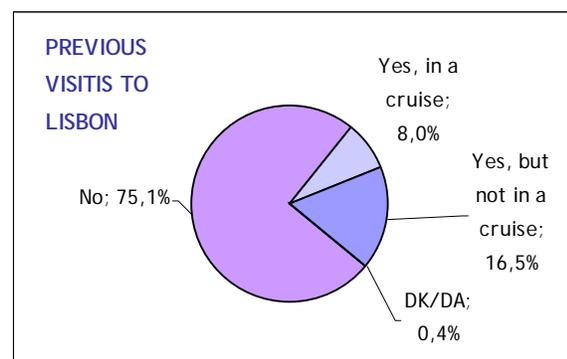
52,8% of the interviewed passengers chose to participate in some of the organised excursions available within the cruise programme (46,5% in 2010), while the Bar service was used by 32,5%. 43.2% took advantage of all the excursions (43,2% in 2010).

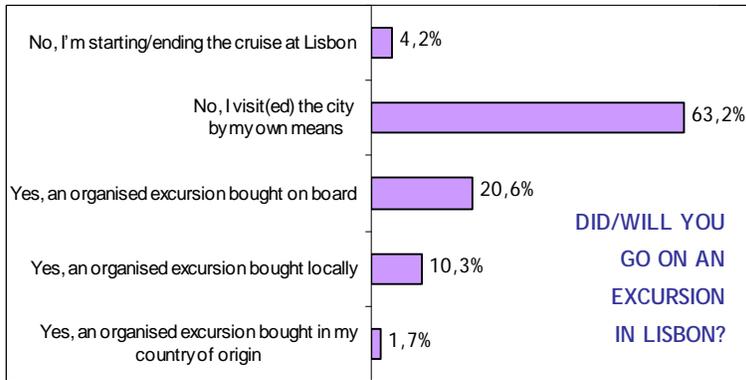
On a scale from 1 to 10, the average level of satisfaction with the Cruise was of 8,4 (7,9 in 2010).



THE VISIT TO LISBON

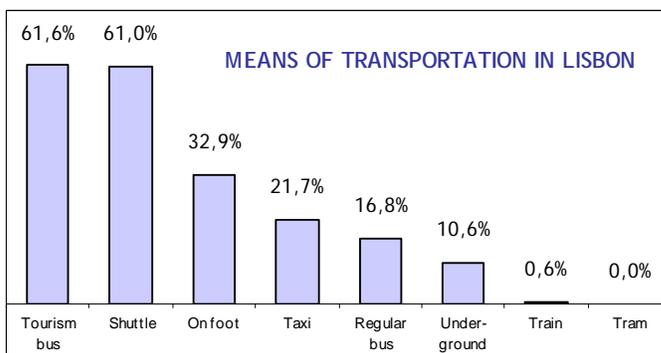
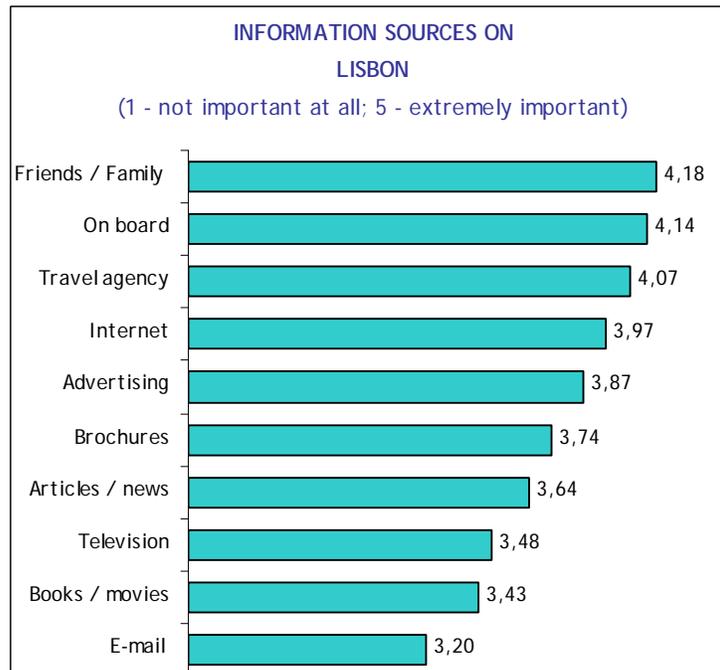
24,5% of the interviewed passengers had already visited Lisbon previously (55,5% in 2010). 8,0% done it in the context of a cruise trip.





As well as In 2010, the large majority of the passengers preferred to visit the city on their own (50,5% in 2010). The guided tours were, mostly, bought on board.

The main sources of information on Lisbon were the ones provided by Friends and/or Family, the ones made available on board and the Travel agency. In 2010, the information gathered on board took the lead, with Friends and/or Family and Internet together in second place.

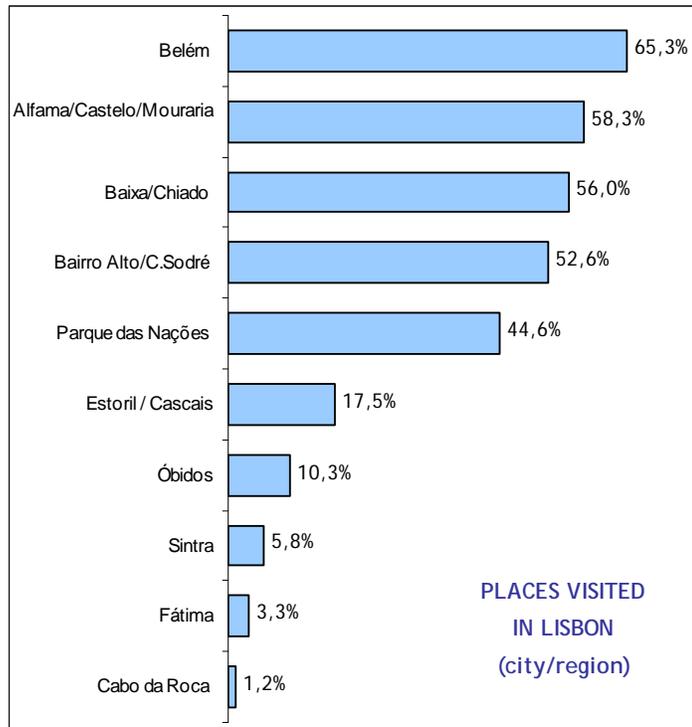


While visiting Lisbon, the means of transportation most used were the tourism bus and the shuttle, almost tied. In 2010, the shuttle was in first place with 76,7%, followed by the taxi and the walks around the city (31,1% and 21,2%, respectively).

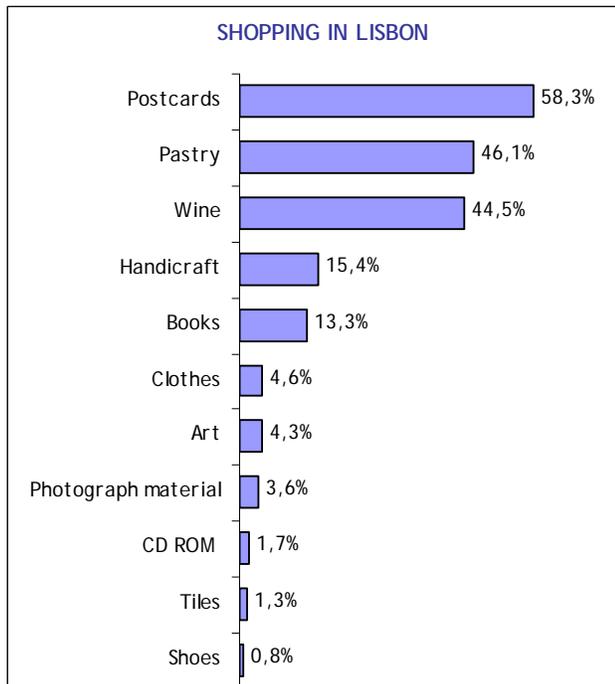
In 2011, the most popular visited areas within Lisbon were Belém, Alfama/Castelo/Mouraria and Baixa-Chiado. While Belém and Baixa-Chiado repeat the top positions from 2010, Alfama/Castelo /Mouraria climbed from fifth to second place this year.

On average, these passengers spent 9,25 hours in Lisbon (9,22 in 2010), with 2,3% having stayed one day and 0,4% two days.

0,3% of the interviewed passengers spent the overnight in an hotel in Lisbon (0,0% in 2010).



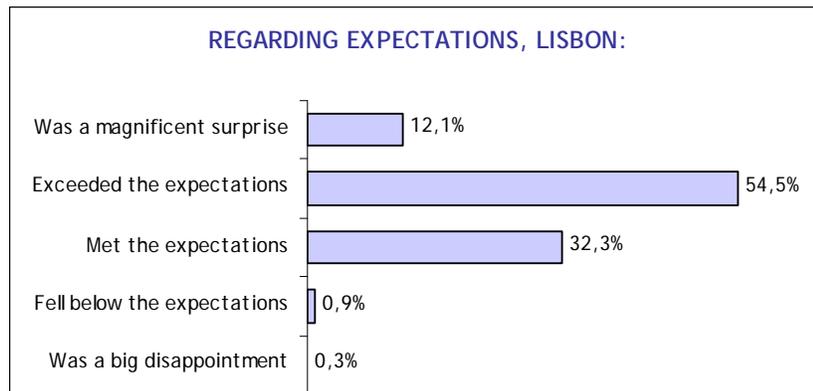
Regarding shopping in Lisbon, the four most sought after products, similarly to last year although in a different order were Postcards, Pastry, Wine and Handicraft. In 2010, Wine came in first.



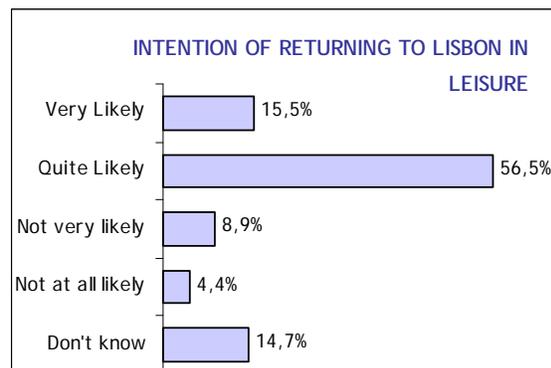
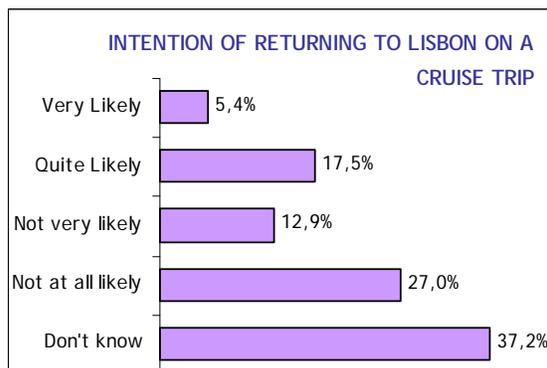
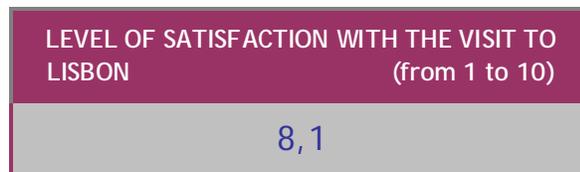
When asked about what they liked most in Lisbon, the lead belonged to the Weather, followed by the Local people and the Level of prices. In 2010, the most value criteria were Security, Cleanliness and the Weather.

WHAT DID YOU ENJOY IN LISBON?			
(1 - very little; 5 - very much)			
Weather	8,23	Quality of the organised excursion on shore	7,77
Local people	8,09	Cleanliness	7,72
Prices	8,09	Service at restaurants	7,70
Walk around the city	7,99	Passenger welcoming services at Lisbon port	7,67
Quality of cultural offer	7,98	Fastness of embarkment/ disembarkment formalities	7,65
Security	7,97	Handicrafts	7,60
Monuments, Churches and Museums	7,97	Safety on embarkment / disembarkment	7,56
Gastronomy & Wine	7,93	Casinos	5,53
Quality of tourism information about Lisbon	7,88		
Quality of commercial offer	7,87		
Access to tourism information about Lisbon	7,81		
Fastness of the access to the city	7,77		

Regarding the expectation previous to their visit to Lisbon, 66,5% of the interviewed passengers saw their expectations met.



On a scale from 1 to 10, the average level of satisfaction with the visit to Lisbon was of 8,1 (7,4 in 2010).

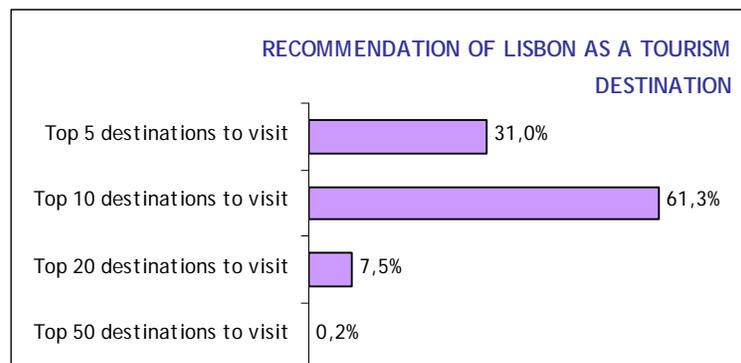


22,9% of the passengers considers the return to Lisbon in a cruise trip as likely or very likely, while 72,0% has the same evaluation of their return to the city outside the context of a cruise.

99,4% of the interviewed passengers recommend Lisbon as a port of call. For the recommendation of Lisbon as a global tourism destination that percentage was 99,2%. In 2010, these values were of 98,6% in both cases.

RECOMMENDATION OF LISBON AS A PORT OF CALL FOR CRUISES	RECOMMENDATION OF LISBON AS A TOURISM DESTINATION
99,4%	99,2%

In what concerns their recommendation as a tourism destination, 31,0% of these cruise passengers places Lisbon in the Top 5 destinations to be visited, while 61,3% include Lisbon in the Top 10.



EXPENSES

On average, the interviewed cruise passengers had a daily individual expense of **52,91** euros during their passage through Lisbon (60,08 euros in 2010).

EXPENSES	% passengers who affirm to have had this expense	average value for the passengers who had this expense (per person, per day)
Visit to monuments/ museums / attractions	6,3%	13,89 €
Shopping	85,9%	30,75 €
Food & beverage	66,8%	18,96 €
Transportation in the city	51,3%	14,94 €
Accommodation	0,2%	30,00 €
Other	2,9%	13,22 €

From the items composing this expense, it was possible to draw the following information: 6,3% has had expenses while visiting Museums or Attractions, in an average value of 13,89 euros. 85,9% of the passengers spent money in Shopping - 30,75 euros per person on average. 66,8% had expenses on Food & Beverage - 18,96 euros per day. 51,3% spent money in Transportation while in Lisbon, with an average value of 14,94 euros per day. And the 0,2% who had accommodation expenses, the average value was of 30,00 euros.

CONCLUSION

The cruise passenger has an average age of 55,3 years old, is married with no children. He/She is professionally active and has a university degree. Generally, travels accompanied with his/her life partner.

Contrary to the results of previous years, the majority is in his/her first cruise experience. Of those who had already done at least one cruise trip previously, the preferred destination was the Northern Europe. Mainly they used the Travel Agency to gather information about the cruise. The choice was made mainly taking into account the resting conditions and the lodging conditions on board. The inclusion of Lisbon had some level of importance in this choice.

The participation in part of the organised excursions was the preferred activity within the cruise experience, even though the majority has chosen to visit Lisbon on their own. The most relevant source of information on Lisbon was the one provided by friends and/or family. Regarding shopping, the highlights were postcards and pastry.

On average, the interviewed cruise passengers have had an individual daily expense while in Lisbon of 52,91 euros, which represents a slight decrease from the previous year.

The level of satisfaction with the cruise is high, the same happening with the visit to Lisbon. The Weather, the Local people and the Level of prices are the most valued criteria in a specific evaluation.

The probability of returning to Lisbon outside the context of a cruise (72,0%) is stronger than the one considered within another cruise trip (22,9%). Almost all the passengers recommend Lisboa both as a port of call for cruises and as tourism destination, placing Lisbon within the Top 10 of destinations to visit.