



SURVEY TO
CONGRESS PARTICIPANTS

2016

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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 2015, the company Zii – Informática e Informação, Lda. did a total of 908 interviews to international congress participants.

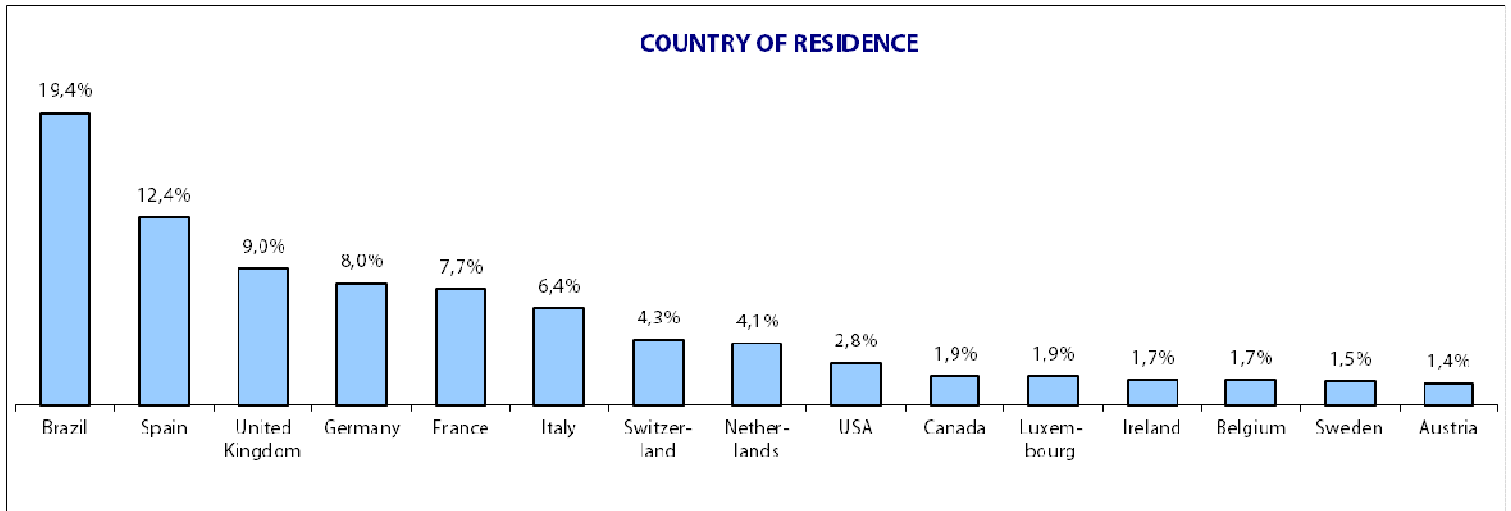
For the 2016 edition the following events were under analysis:

- SESAM 2016 – 22nd Annual Meeting of the Society in Europe for Simulation Applied to Medicine, from June 15th to 17th at the Lisbon Congress Centre;
- 8th World Spiritist Congress, from October 7th to 9th at MEO Arena;
- IGCS 16th Biennial Meeting of the International Gynecologic Cancer Society, from October 29th to 31st at the Lisbon Congress Centre.

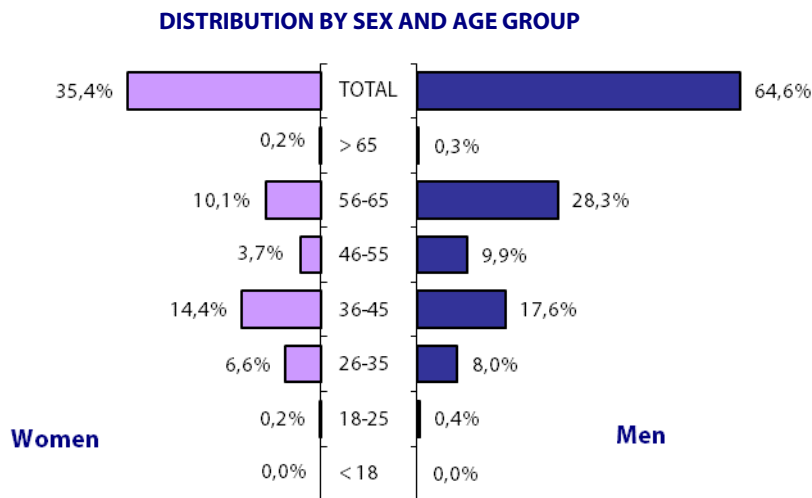
The aim of this report is to make an analysis of the data, highlighting the main conclusions and comparison with the previous year.

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

MAIN RESULTS

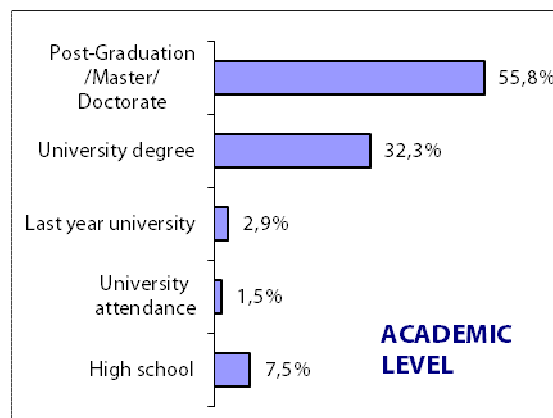


Regarding the country of residence of participants in the congresses under analysis, Brazil occupied the first place, fact that is certainly related with the inclusion, in this edition of the study, of the 8th World Spiritist Congress. In 2015, Brazil came in 8th with 4,3%, while the United Kingdom, now in third, was the leader. Germany, France and Italy also still hold relevant positions among the main nationalities.



Within the congresses of this study, male participants continue to hold a stronger presence over female participants (77,3% in 2015). Regarding the age groups, most women were between 36 and 45 years old, while men were between 56 and 65 years old.

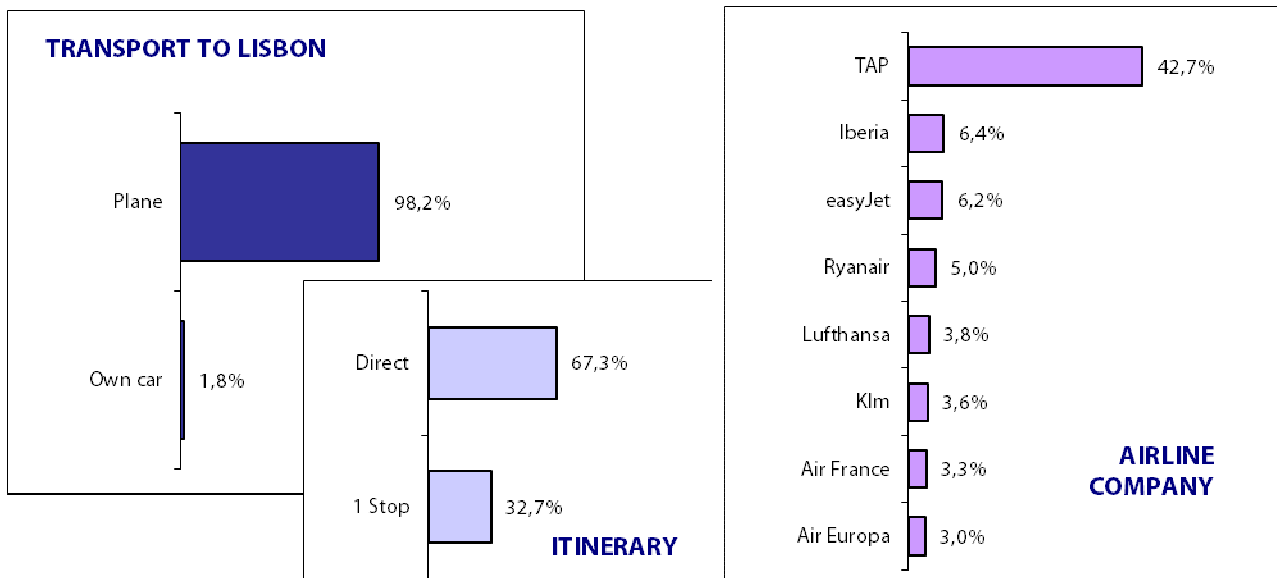
In what concerns the academic level, 55,8% of congress participants holds a post-graduation, master or doctorate (75,2% in 2015).



ACCOMMODATION	% total
5 ***** Hotel	14,2%
4 **** Hotel	61,1%
4 **** Aparthotel	0,3%
3 *** Hotel	20,0%
2 ** Hotel	2,9%
1 * Hotel	0,1%
Local accommodation	0,3%
Family/friend's house	0,3%
Own house	0,1%
DK/NA	0,6%

The choice of accommodation went mainly to 4-star hotel units (58,6% in 2015). 0,3% chose local accommodation (0,8% in 2015) and the same percentage stayed with family and/or friends.

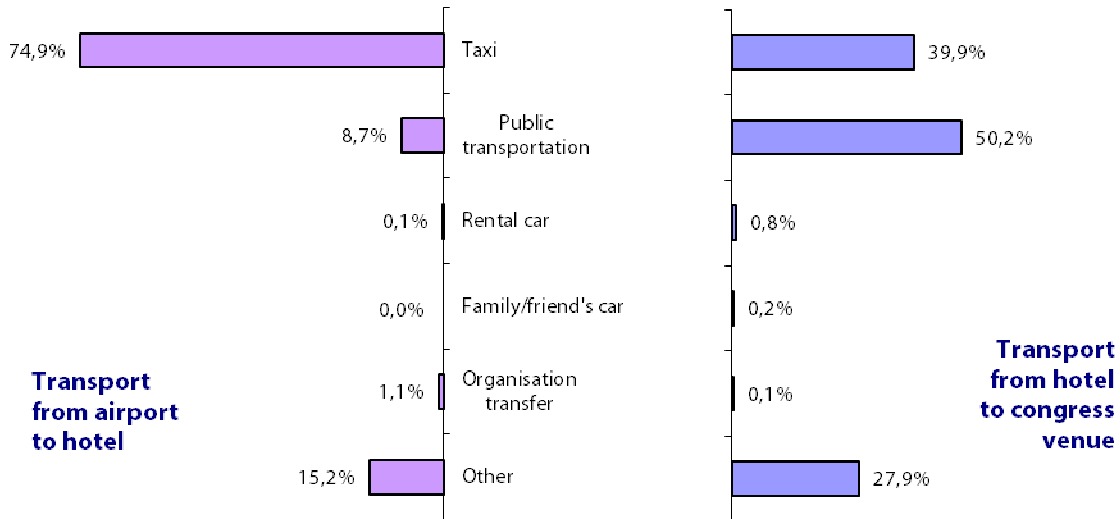
TRANSPORT



98,2% of congress participants arrived in Lisbon by plane (99,9% in 2015), 67,3% of which through a direct airline connection.

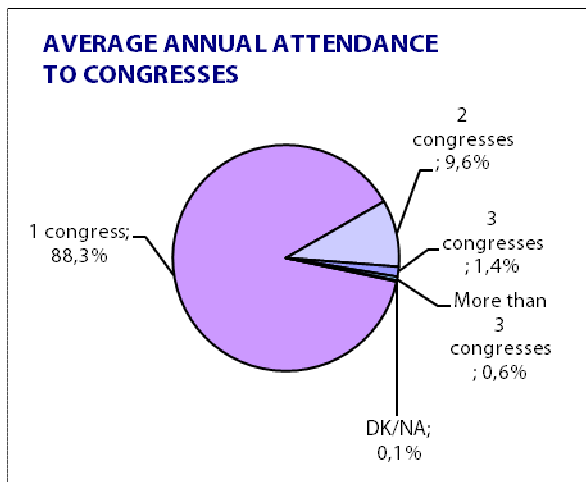
As in previous years, TAP accounts for the carrier used by most congress participants, with 42,7% of the answers (36,6% in 2015). Following are Iberia (6,4%) and easyJet (6,2%). A companhia Ryanair, em 8º lugar no ano passado, sobe para quarto lugar com 5,0% The use of low-cost carriers as a whole increased their weight from 12,5% in 2015 to 17,4% this year.

The taxi remains the preferred means of transportation when going from the airport to the hotel (89,0% in 2015), while from the hotel to the congress venue around half of the congress attendants interviewed used public transportation (55,0% in 2015).



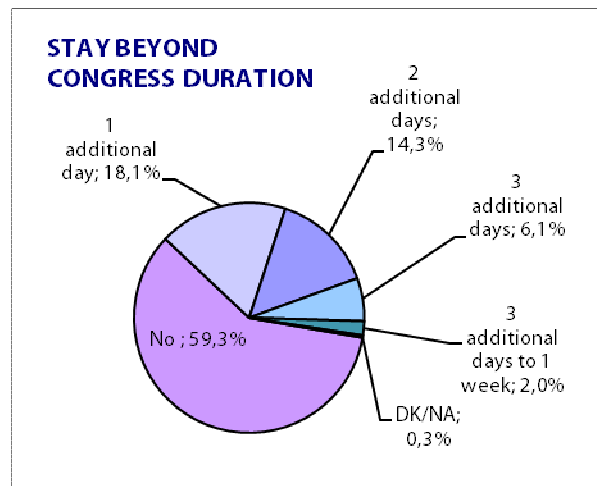
ATTENDANCE TO CONGRESSES

40,1% of congress participants intends to stay in Lisbon beyond the congress duration (7,1% in 2015).



20,8% of the congress participants had already visited Lisbon previously to the event in question. Almost the double of last year (10,5%).

44,7% travelled alone, while 40,1% was accompanied by one other person. In 2015, these percentages were of 53,7% and 42,7%, respectively.



The large majority of interviewed congress participants (88,3%) attends, on average, 1 congress a year (89,5% in 2015). 2,0% attends, on average, 3 or more events annually.



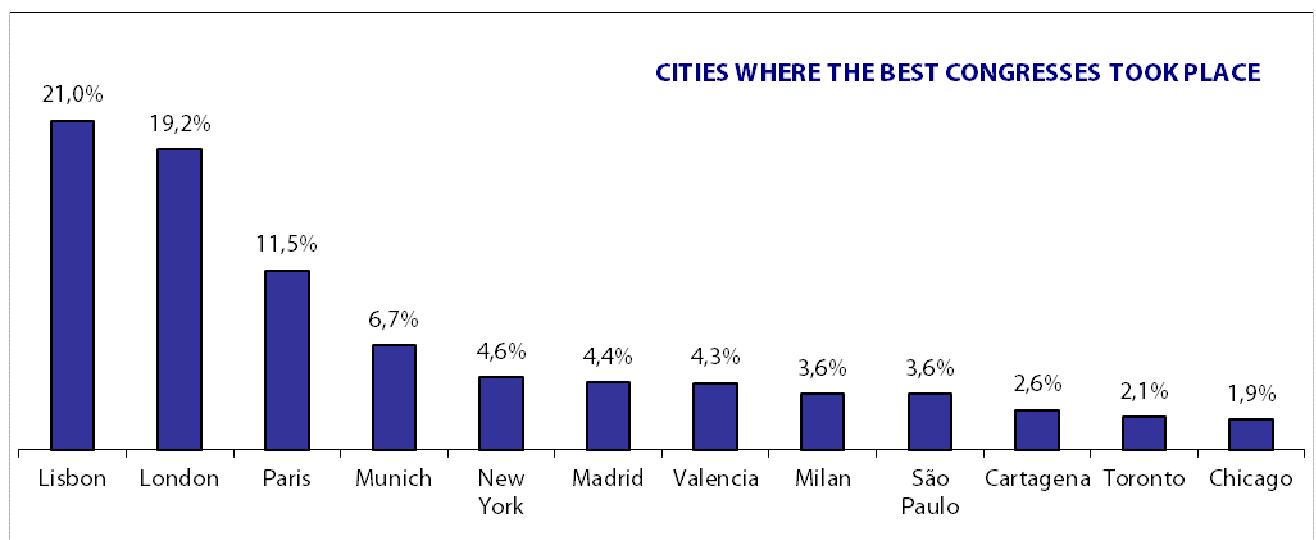
EVALUATION

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

Similarly to 2015, the globally most valued criterium this year was the Functionality of support equipment at the congress venue. In second came the Quality of the extra-congress programme and in third the Quality of the equipment at the congress venue, these two inverting last year's positions.

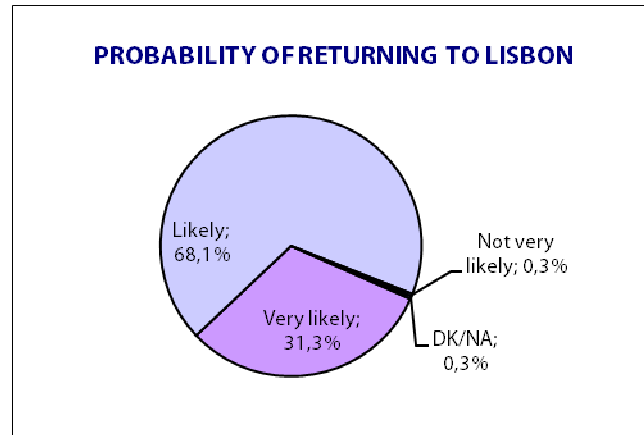
The congress participants who gave the highest average score to their congress experience in Lisbon were the ones from Luxembourg, the Americans and the Canadians.

The global evaluation of Lisbon as a congress destination is higher than the average value of the evaluation per category (8,5 against 7,9). In 2015, the average values were 8,4 and 8,1, respectively.



In the congresses under analysis in 2016, Lisbon comes in 1st place among those cities where, according to the interviewed congress participants, the best congresses took place. London occupies the second position and Paris the third. Both Lisbon and London repeat the places held in 2015 (28,2% e 18,9%, respectively).

When questioned about the probability of returning to Lisbon, (and excluding the “don’t know / no answer” option), 31,3% of congress participants consider their return very likely (33,% in 2015).



99,6% the participants attending the considered congresses recommended Lisbon as a city for congresses. As a tourism destination this recommendation is of 99,7%. In 2015, the percentages were, respectively, of 98,7% and 99,3%.



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 (67,6% of the total), 22,3% admitted having had transportation expenses in order to get to Lisbon, having paid an average of 538,64€. The congress fee, admittedly paid by 31,3% of the participants, cost an average of 459,59€. 45,1% had expenses with accommodation, in an average value of 121,87€ per night. Regarding allowances, 93,3% congress participants admitted having had this expense, paying an average of 51,69€. 91,7% admitted having had local transportation expenses, having paid an average of 18,69€ per day. Other expenses, admitted to have been paid by 91,2% of congress participants, have an average daily value of 39,88€.

Average expense per participant	
Unique value:	
Transportation	538,64 €
Congress fee	459,59 €
Value per night:	
<small>(for an average stay of 3,9 days we estimate 2,9 overnights)</small>	
Accommodation	121,87 €
Value per day:	
<small>(for an average stay of 3,9 days)</small>	
Allowances	51,69 €
Local transportation	18,69 €
Other	39,88 €
TOTAL	1.781,68 €

Average stay per participant	3,9 days
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The total value is higher than last year's: 1.696,27€. The most significant variations were the value of the Transport to Lisbon (+174,6% than in 2015) and the Other expenses (+73,3%), which is consistent with the previous results for the country of residence of participants, namely coming from Brazil. In the opposite direction varied the average value of the Transportation within the city (-33,1%) and the Congress fee (-30,7%).

The average stay of congress participants is 3,9 days (3,8 days in 2015).

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 **1.781,68€**.