



SURVEY TO
CONGRESS PARTICIPANTS

2019

SURVEY TO CONGRESS PARTICIPANTS

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 2019, the company 2ii – Informática e Informação, Lda. did a total of 901 interviews to international congress participants.

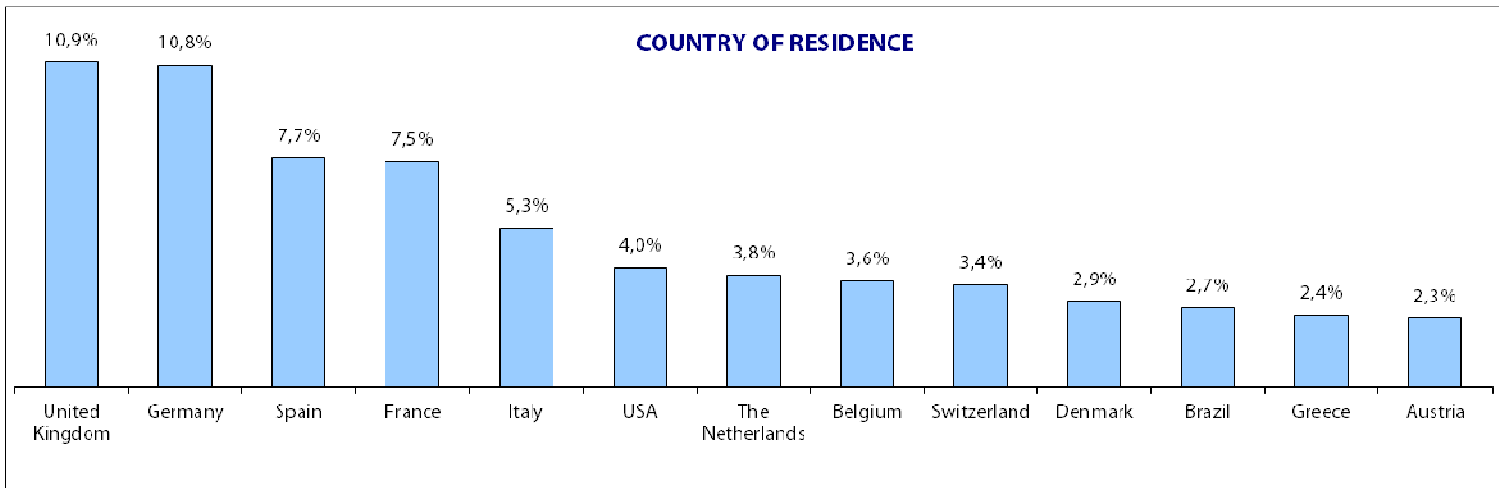
For the 2019 edition the following events were under analysis:

- EHRA Europace 2019 European Heart Rhythm Association 2019, from 17 to 19 March at the Lisbon Congress Centre;
- EAACI Congress 2019 - European Academy of Allergy and Clinical Immunology, from 1 to 5 June at FIL and Altice Arena;
- EFORT - European Federation of National Associations of Orthopaedics and Traumatology, from 5 to 7 June 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.

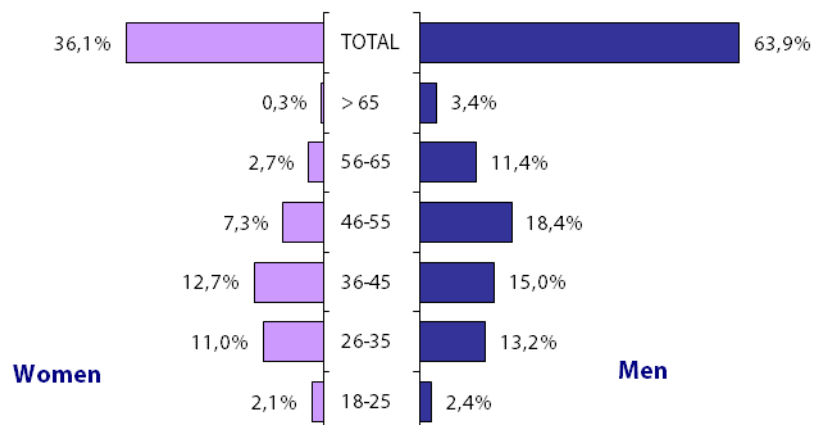
The specificity of the scope of the congresses might limit some of the results and should be taken into account.

MAIN RESULTS



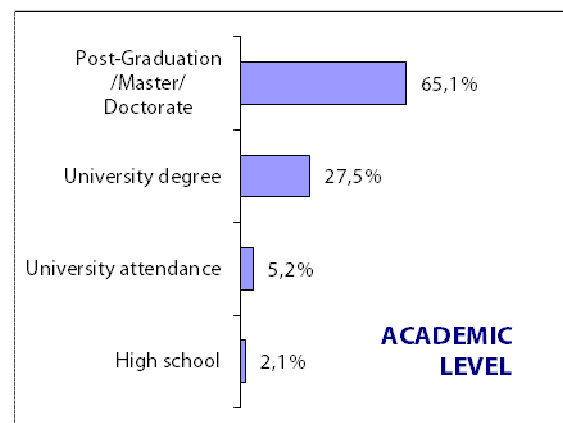
Regarding the country of residence of participants in the congresses under analysis, the United Kingdom occupied again the first place, followed very close by Germany and then Spain. In 2018, the weight of these markets were 14,2%, 9,0% and 13,0%, respectively.

DISTRIBUTION BY SEX AND AGE GROUP



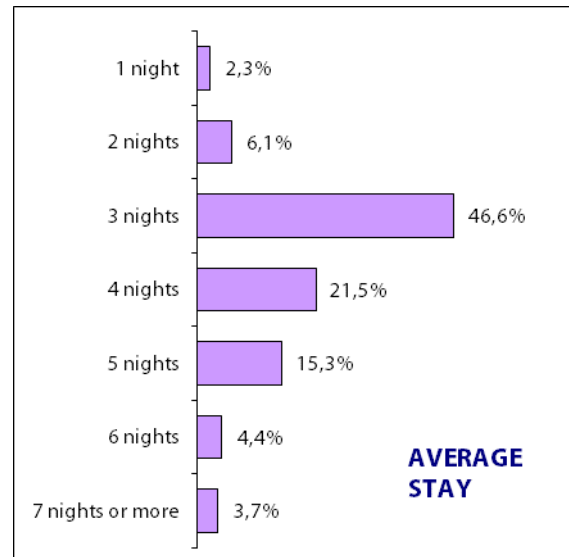
Within the congresses of this study, male participants continue to hold a stronger presence over female participants (slightly higher than the 63,1% in 2018). Regarding the age groups, women were predominantly between 36 and 45 years old, while men were mainly between 46 and 55 years old.

In what concerns the academic level, 65,1% of congress participants hold a post-graduation, master or doctorate (56,3% in 2018).



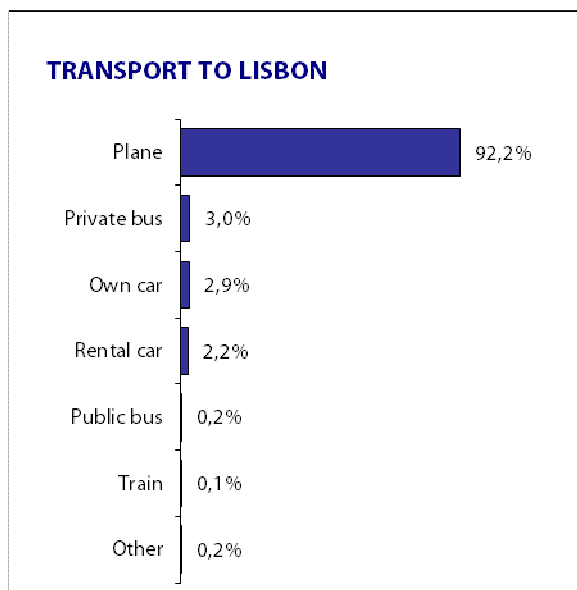
The average stay in the Lisbon Region was of 3,7 nights (3,8 nights in 2018), while 23,4% of the participants in these events stayed 5 or more nights (28,8% in 2018).

ACCOMMODATION	% total
5 ***** Hotel	13,3%
4 **** Hotel	60,1%
4 **** Aparthotel	0,1%
3 *** Hotel	15,6%
2 ** Hotel	0,4%
1 * Hotel	0,1%
Local accommodation	9,6%
Family/friend's house	0,1%
DK/NA	0,7%
TOTAL	100%



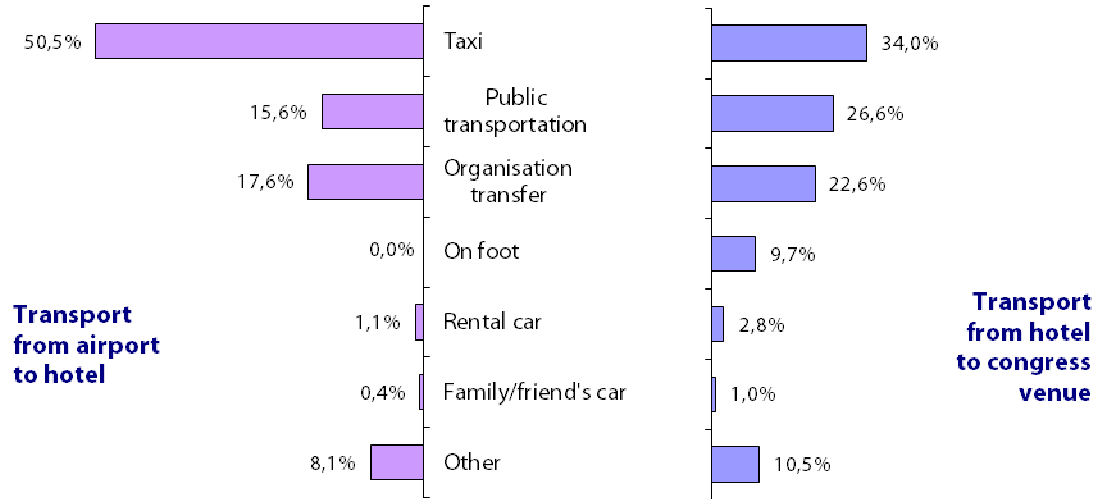
The choice of accommodation went mainly to 4-star hotel units (61,1% em 2018). 9,6% chose local accommodation (7,3% in 2018).

TRANSPORT



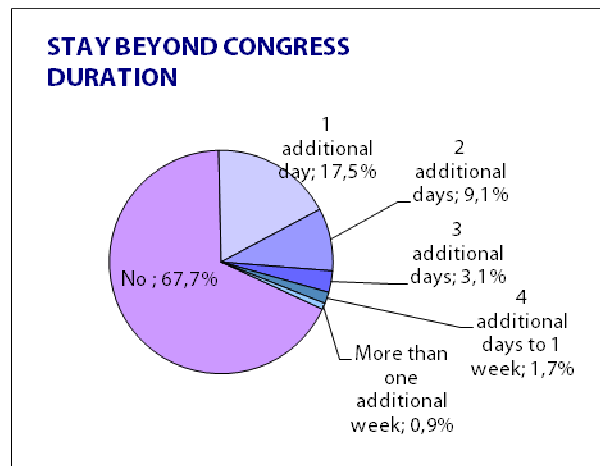
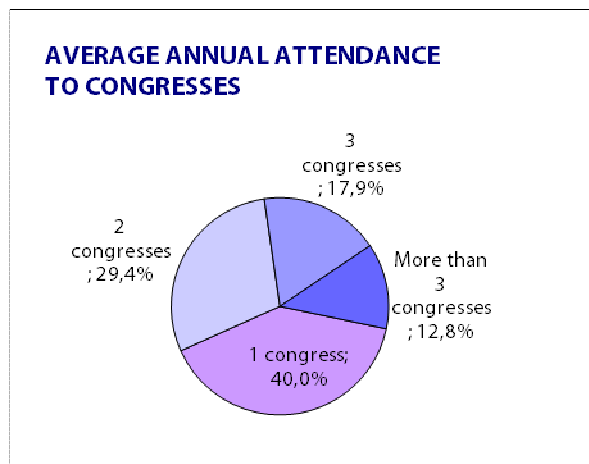
92,2% of congress participants arrived in Lisbon by plane (95,3% in 2018).

The taxi remains the preferred means of transportation both when going from the airport to the hotel (65,6% in 2018) and from the hotel to the congress venue (36,7% in 2018). In the latter, public transportation was the second most used (31,8% in 2018).



ATTENDANCE TO CONGRESSES

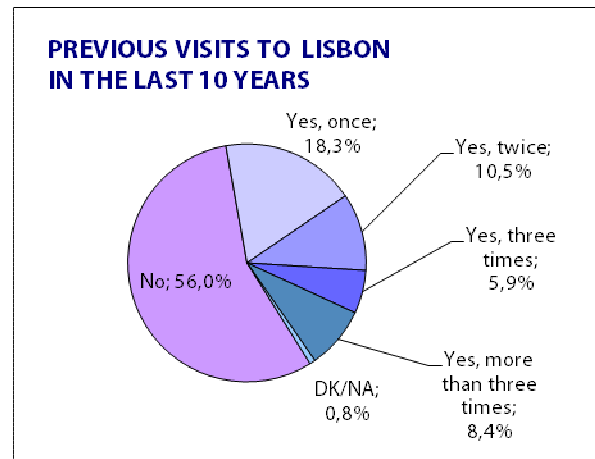
32,3% of congress participants intends to stay in Lisbon beyond the congress duration (27,7% in 2018).



The majority of interviewed congress participants (40%) attends, on average, 1 congress a year (58,4% in 2018). 30,6% attends, on average, 3 or more events annually (18,8% in 2018).

43,2% of the congress participants had already visited Lisbon in the previous 10 years.

53,9% travelled alone, while 18,8% was accompanied by one other person. In 2018, these percentages were of 42,8% and 32,0%, respectively.



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.

The average stay of congress participants in this edition of this study was of 4,7 days (4,3 days in 2018).

Average stay per participant

4,7 days

Of the congress participants who answered the question regarding expenses (84% of the total), only 12,4% admitted having had transportation expenses in order to get to Lisbon, having paid an average of 360,01€. The congress fee, admittedly paid by 82,6% of the participants, cost an average of 181,72€. 35,1% had expenses with accommodation, in an average value of 126,84€ per night. Regarding allowances, only 17,4% congress participants admitted having had this expense, paying an average daily value of 24,36€. 57,1% admitted having had local transportation expenses, having paid an average of 17,94€ per day. Other expenses, admittedly having been paid by 69,9% of congress participants, had an average daily value of 33,81€.

Average expense per participant	
Unique value:	
Transportation	360,01 €
Congress fee	181,72 €
Value per night:	
(for an average stay of 3,7 nights)	
Accommodation	126,84 €
Value per day:	
(for an average stay of 4,7 days)	
Allowances	24,36 €
Local transportation	17,94 €
Other	33,81 €
TOTAL	1.368,73 €

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 **1.368,73€**.

Although there was a slight increase in the average stay, the global value is lower than last year's (1.834,14€), since most of the items had lower average values comparing to the previous edition of this study. Such was the case, more significantly, of the costs of the transport to Lisbon (-22,9% than in 2018), the congress fee (-62,9%) and allowances (-39,2%). Only the costs of accommodation and local transportation in the destination increased: +2,6% and +0,8%, respectively.

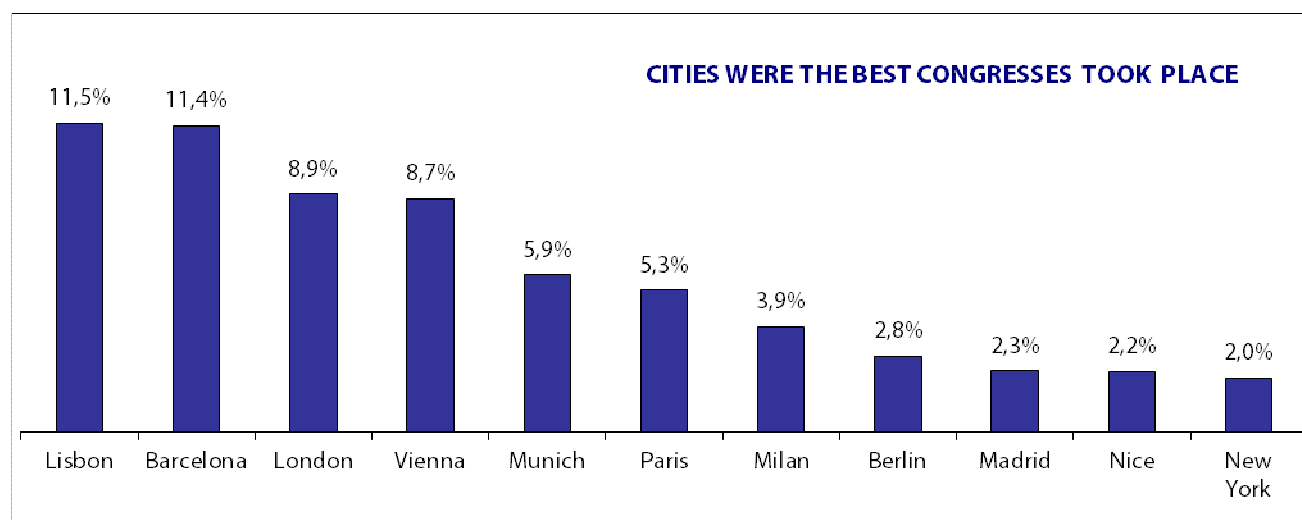
EVALUATION

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

In 2019, the globally most valued criteria in the evaluation of the congresses considered in this study were the Functionality of support equipment at the congress venue, the Quality of the extra-congress programme and the Quality of equipment at the congress venue. Last year, the most valued were the Quality of the extra-congress programme, the Functionality of support equipment at the congress venue and the Prices of transportation in Lisbon.

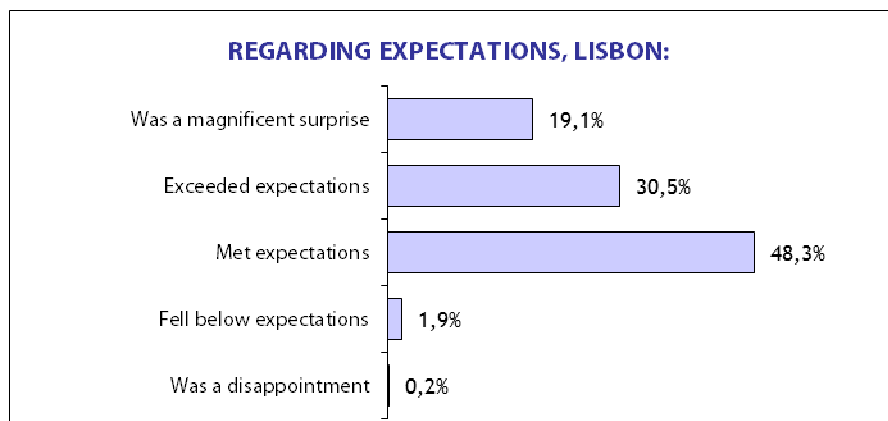
The congress participants who gave the highest average score to their congress experience in Lisbon were the ones from the Russia, the Czech Republic and Austria.

The global evaluation of Lisbon as a congress destination is higher than the average value of the evaluation per category (9,0 against 8,6). In 2018, the average values were 8,7 and 8,1, respectively.



As in 2018, Lisbon comes in 1st place among those cities where, according to the interviewed congress participants in 2019, the best congresses took place (10,1% in 2018). Barcelona and London occupy the second and third positions, inverting the places from last year (8,1% and 9,3%, respectively).

Regarding the expectation previous to their visit to Lisbon, 49,6% of these passengers saw their expectations exceeded.



When questioned about their agreement with the sentences “Lisbon is a destination with all the conditions to hold congresses” and “Lisbon is a destination that deserves a leisure visit”, more than 96% of these congress participants totally or partly agree with them. On a scale from 1 to 5, where 5 means total agreement, both sentences obtain a level over 4,7.

	Totally agree	Partly agree	Do not agree or disagree	Disagree	DK/NA	% agreement	Level of agreement (1 to 5)
Lisbon is a destination with all the conditions to hold congresses	81,0%	15,3%	0,9%	0,8%	2,0%	96,3%	4,70
Lisbon is a destination that deserves a leisure visit	87,0%	9,7%	0,6%	0,9%	1,9%	96,7%	4,76

When questioned about the probability of returning to Lisbon, (and excluding the “don’t know / no answer” option), 41,2% of congress participants consider their return very likely (39,8% in 2018).

