



# SURVEY TO CRUISE PASSENGERS

PORTO DE LISBOA

2018

# SURVEY TO 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 cruise passenger and his/her level of satisfaction with the visit to Lisbon, a new edition was carried out in 2018.

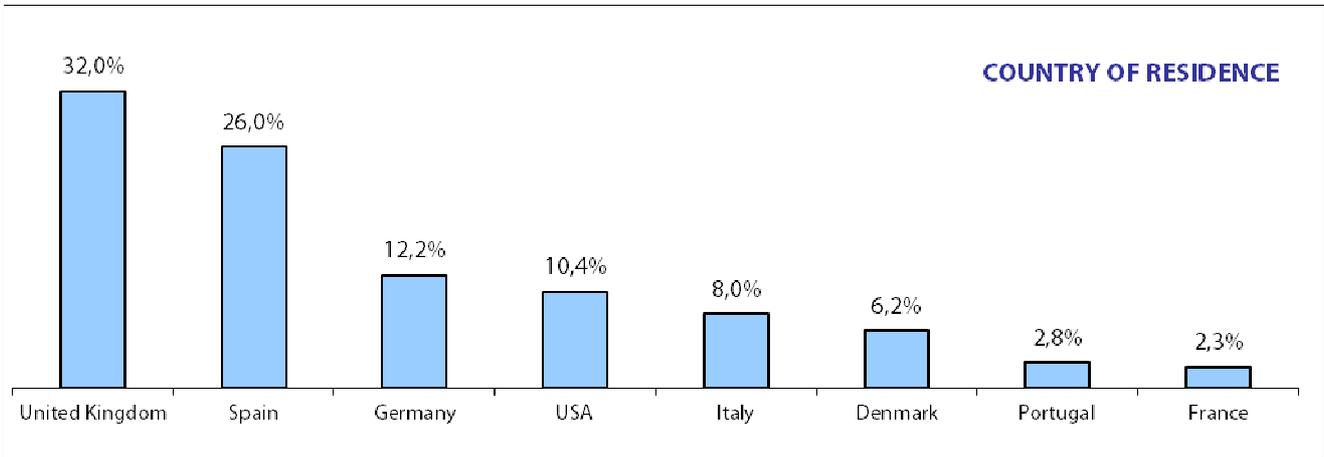
With this objective, a sample of 54 ships stopping in Lisbon between April and November was selected, where we were able to interview 1000 foreign passengers.

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

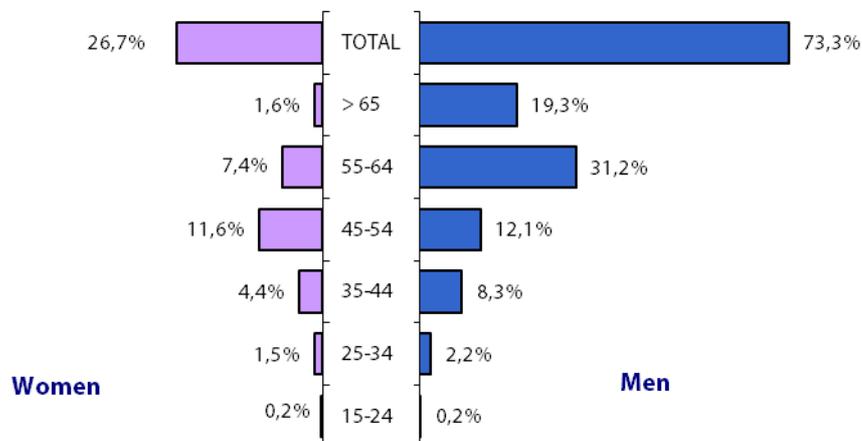
This report intends to be an analysis of the gathered data, highlighting the main results.

## PROFILE

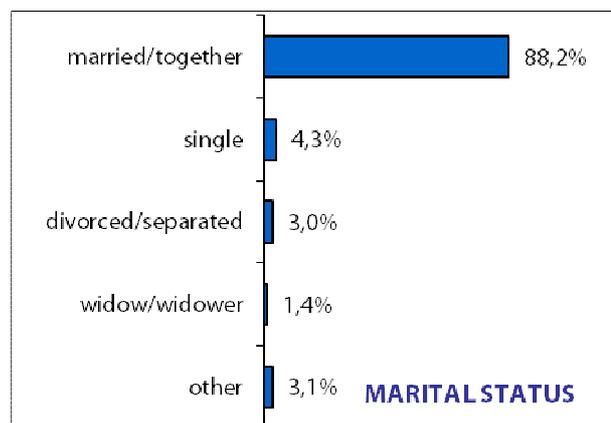
Similarly to previous years, in terms of country of residence, 32,0% of the passengers interviewed live in the United Kingdom (40,5% in 2017). In the same way, the second place belongs to Spain (22,1% in 2017), and the third place to Germany (12,9% in 2017).



73,3% of the interviewed passengers is male (73,6% in 2017). In terms of age group, 59,5% is over 55 years old, 36,4% is between 35 and 54 and 4,1% below 35. In 2017, those percentages were, respectively, 62,7%, 32,7% and 4,7%.

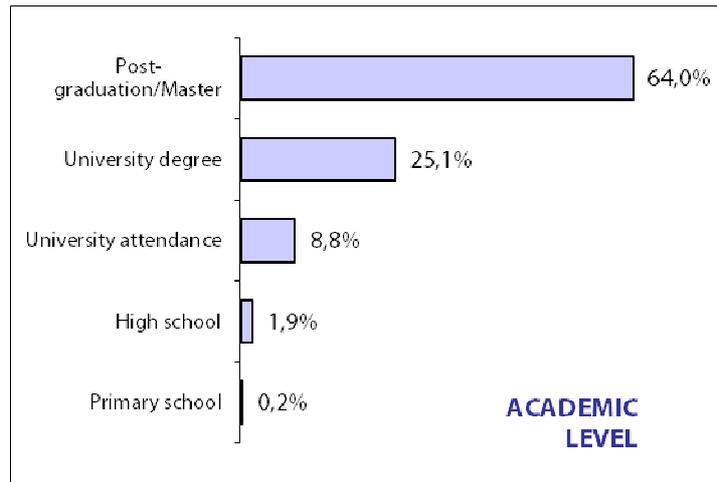


As a common trend in this study, the large majority of the passengers is married or with a life partner (82,7% in 2017).

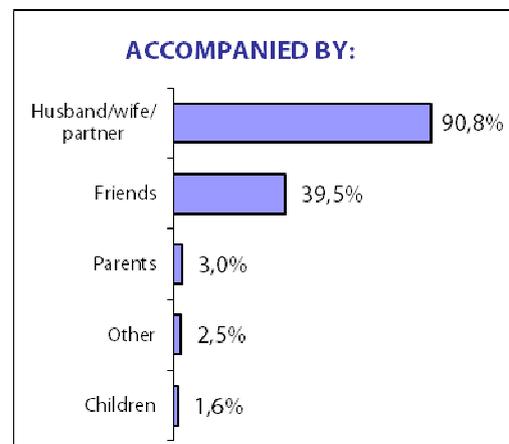


In what concerns the academic level, 89,1% of the passengers holds at least a university degree (the same percentage as in 2017).

The weight of retired passengers was of 11,6% (9,7% in 2017).

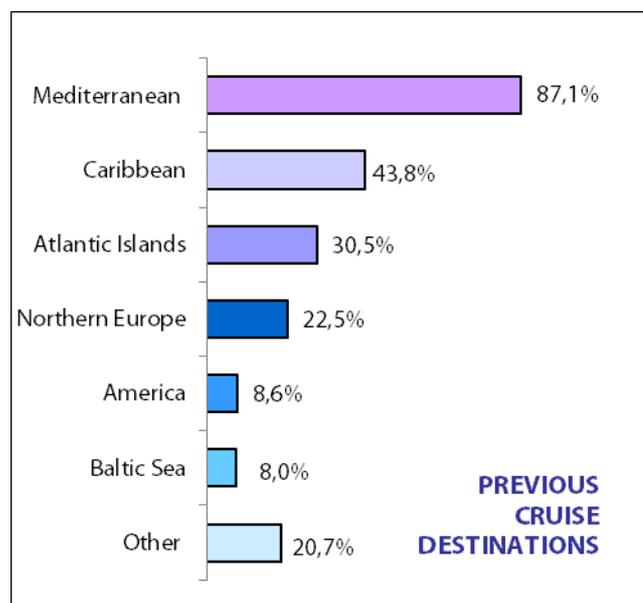
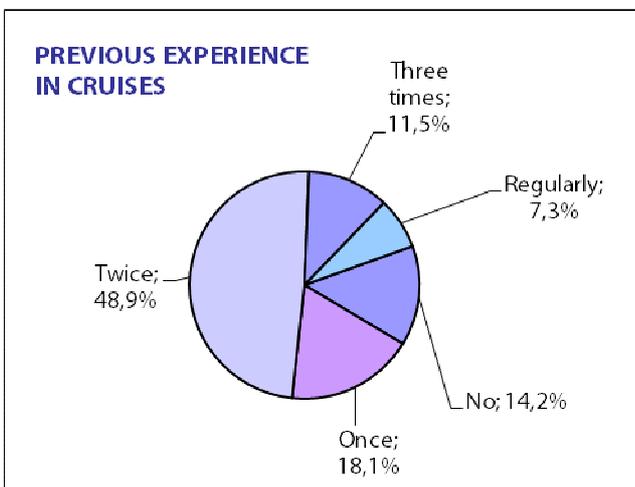


As has usually been the case, the strong majority of the interviewed passengers (98,9%) travels accompanied (98,3% in 2017). 90,8% of those, travels with their wife/husband/partner, with 49,5% travelling only as a couple (44,8% in 2017), and 6,4% only with friends (6,1% in 2017).

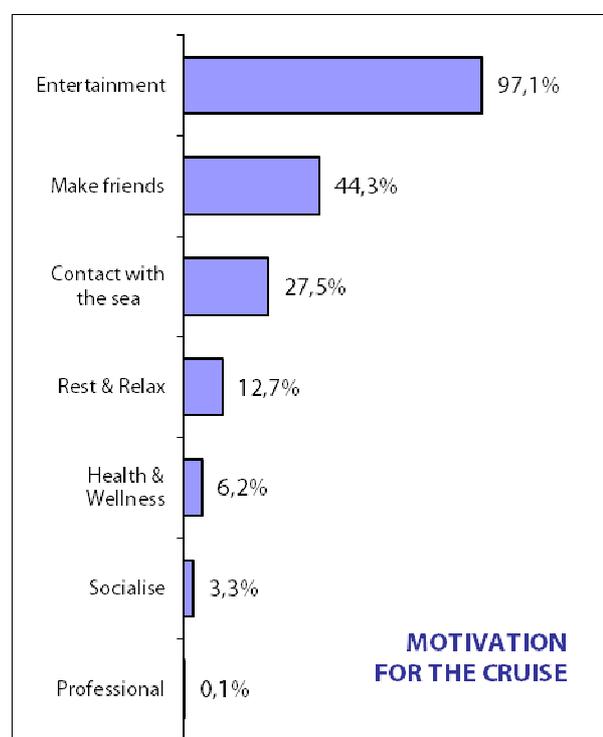
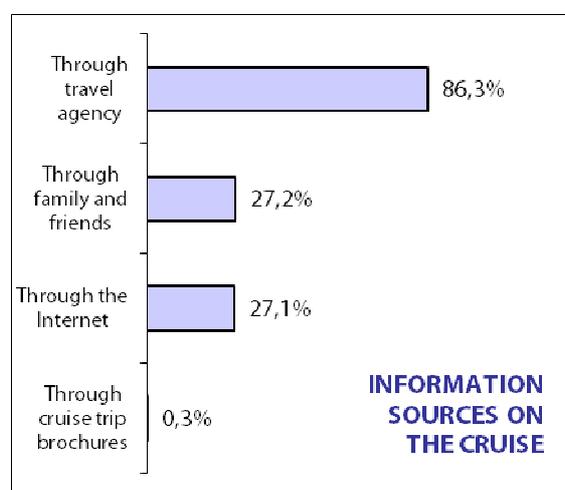


**THE CRUISE**

14,2% of the passengers were on their first cruise (8,9% in 2017). On average, the cruises they were in had a duration of 13,2 days. 85,8% had had previous experiences in this type of tourism (90,1% in 2017), and, of these, the majority chose the Mediterranean or the Caribbean as a destination.



As in 2017, the main source of information about the cruise was the travel agency (84,4% in 2017), followed by family and friends (31,8% in 2017).

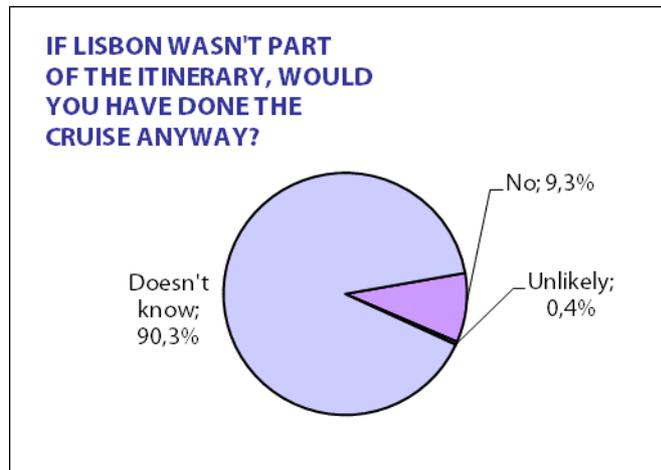


For the interviewed passengers, the Leisure element keeps being the main reason for doing a cruise (94,2% in 2017). In second and third places came Making friends and Contact with the sea.

INFLUENCE WHEN CHOOSING THE CRUISE	not at all important	slightly important	very important
The cities present in the cruise itinerary	0,0%	27,4%	72,6%
Travel agent's advice	10,8%	53,1%	36,1%
The cruise company providing this cruise trip	11,8%	64,4%	23,8%
Previous cruise in other destinations	20,8%	60,3%	18,9%
Accommodation conditions on board	0,3%	85,2%	14,5%
The chance to visit Lisbon	1,5%	84,5%	14,0%
The price of the cruise trip	13,9%	73,5%	12,6%
Quality of restaurants on board	0,1%	91,0%	8,9%
Possibility to rest on board	0,2%	92,9%	6,9%
A previous cruise trip calling Lisbon	27,2%	66,5%	6,3%
Entertainment on board	0,2%	94,9%	4,9%
Programs for single people	30,4%	67,2%	2,4%
Number of passengers on board	36,0%	62,1%	1,9%

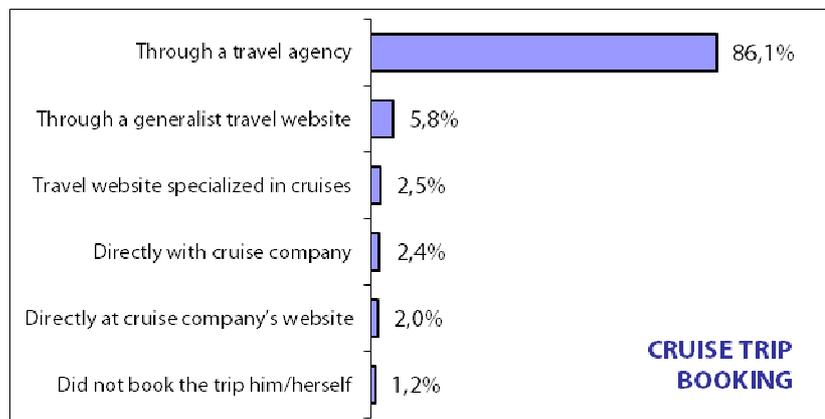
As in 2017, the factors that most influenced the decision to make this cruise were, on a scale from 1 to 5, the ports of call included in the itinerary, followed by the travel agent's advice. In third and fourth places, the cruise company providing the cruise and previous cruises in other destinations

keep having some relevancy as influencing factors. The possibility of visiting Lisbon is very important to 14,0% of the interviewed passengers (10,6% in 2017).



9,3% of the interviewed passengers would not have done this cruise if Lisbon was out of the itinerary, while 0,4% finds it also very unlikely. In 2017, the percentages were, Respectively, of 6,0% and 2,7%.

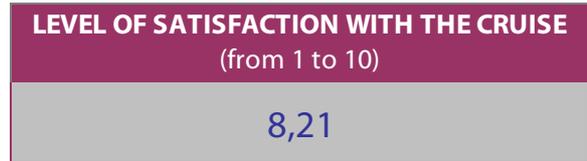
The cruise trip booking was made, in a strong majority of cases, through a travel agent (84,0% in 2017), while 4,4% booked the trip with the cruise company (7,7% in 2017).



Evaluating the conditions aboard the ship (on a scale from 1 to 10), Safety and navigation, as in 2016 and 2017, comes in first place. Animation and entertainment activities, as well as Services/facilities on board are also in top positions.

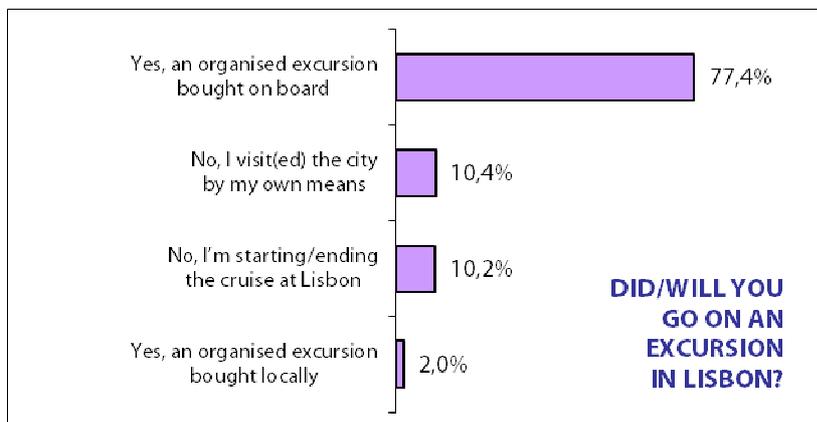
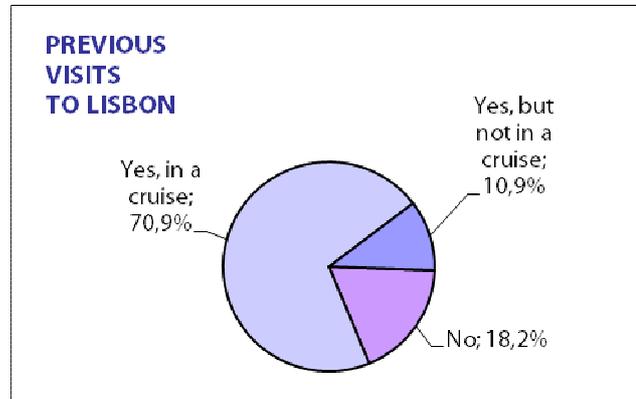
CONDITIONS ON BOARD THE SHIP	evaluation (from 1 to 10)
Safety and navigation	8,85
Animation and entertainment	8,46
Services/facilities on board	8,46
Atmosphere on board	8,36
Value for money	8,15
Ship's functionality and aesthetics	8,14
Interaction with staff from the ship	8,12
Interaction with other passengers	8,08

On a scale from 1 to 10, the average level of satisfaction with the Cruise was of 8,21 (8,37 in 2017).



**THE VISIT TO LISBON**

81,8% of the interviewed passengers had already visited Lisbon previously (88,9% in 2017). 70,9% had done it also in the context of a cruise trip (77,0% in 2017).

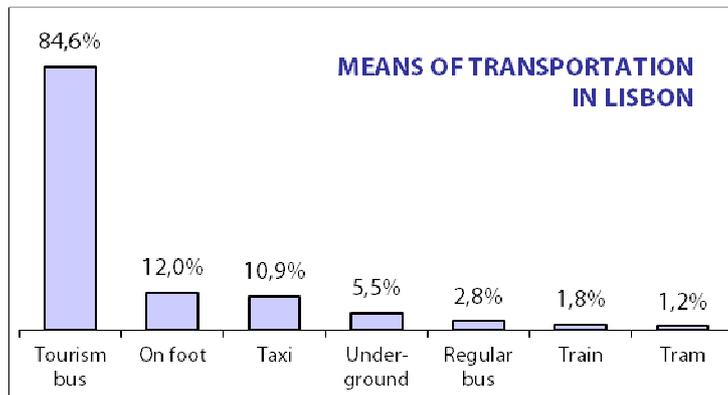


As in the last two years, the majority of passengers chose to do a guided tour in Lisbon bought on board (69,8% in 2017). 10,4% opted to visit the city on their own (13,2% in 2017).

The main sources of information on Lisbon were the one available aboard the Ship, Catalogues/Brochures and Friends or Family. In 2017, the lead belonged, in decreasing order, to the Ship, Travel agencies and Friends or Family.

SOURCES OF INFORMATION ON LISBON (level of use)	DK/DA	no use	little use	much use
In the ship	0,3%	2,3%	62,6%	34,9%
Through catalogues/ brochures	0,3%	6,9%	78,4%	14,4%
Through Friends and family	0,3%	81,6%	4,6%	13,5%
Through advertising	0,3%	31,3%	55,1%	13,3%
Through the TV	0,3%	60,7%	27,1%	11,9%
Through social media	0,3%	82,6%	5,8%	11,3%
Through other official websites	0,3%	85,3%	8,8%	5,6%
By email	0,3%	85,8%	8,4%	5,5%
Through www.visitlisboa.com website	0,3%	85,7%	10,5%	3,5%
Through a travel agent	0,3%	18,6%	79,1%	2,0%
Through books/ movies	0,3%	48,5%	49,5%	1,7%
Through press articles/news	0,3%	24,0%	75,3%	0,4%

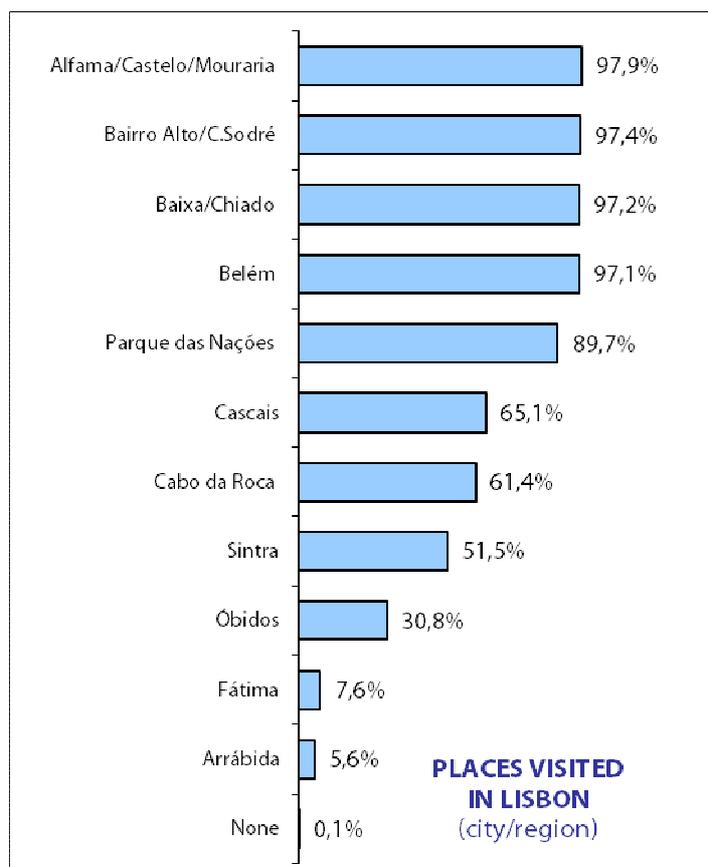
While visiting Lisbon, most people got around by tourism bus, as in previous years (78,5% in 2017). On this edition, walking around and the taxi inverted their positions, both with lower percentages (14,2% and 15,4%, respectively, in 2017). The use of the underground decreased from last year (11,4%).



In 2018, the most popular visited areas within the city of Lisbon were Alfama/Castelo/Mouraria, Bairro Alto/Cais do Sodré and Baixa-Chiado. In 2017, the lead was held by Belém, which now swichtes position with Alfama/Castelo/Mouraria, previously in 4<sup>th</sup> place. Within the Lisbon Region, Cascais is visited by 65,1% of these cruise passengers, followed by Cabo da Roca, with 61,4% and Sintra, with 51,5%.

On average, these passengers spent 11:26 hours in Lisbon (13:46 in 2017).

4,9% of the interviewed passengers spent the overnight in an hotel in Lisbon (10,3% in 2017).



When asked about what they liked most in Lisbon, all the elements of the experience received high evaluations, with the lead belonging to the Weather, the Monuments, churches and museums, and the Cleanliness. In 2017, these were also the top characteristics with the Monuments and the Weather in inverse positions.

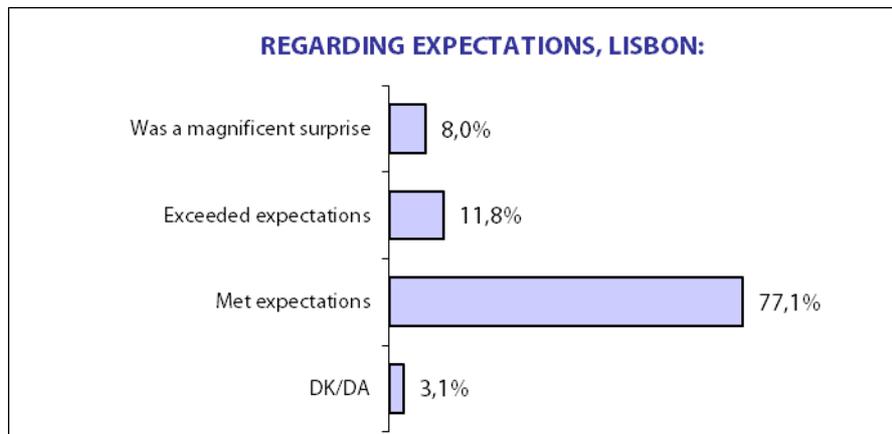
<b>LISBON OFFER</b>	evaluation (from 1 to 10)
Weather	9,09
Monuments, churches and museums	9,03
Cleanliness	8,97
Professional welcoming	8,96
Safety	8,91
Quality of the organized excursion in Lisbon	8,80
Walking around the city	8,69
Fastness accessing the city	8,41
Safety during embarking/disembarking	8,33
Quality of tourist information about Lisbon	8,32
Quality of welcoming services at Lisbon Port	8,29
Gastronomy and wines	8,26
Service at restaurants	8,24
Quality of cultural offer	8,21
Prices	8,20
Quality of commercial offer	8,18
Access to tourist information about Lisbon	8,17
Landscapes and urban environment	8,15
Interaction with other Lisbon visitors	8,13
Interaction with local people	8,11
Fastness of embarking/disembarking formalities	8,10

In what concerns the level of satisfaction with services at the Port of Lisbon, the average value was of 8,34, on a scale from 1 to 10 (8,33 in 2017).

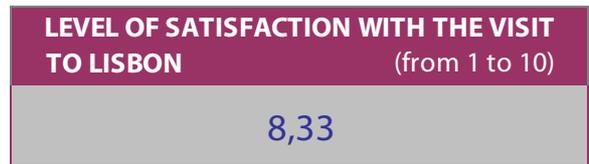
**LEVEL OF SATISFACTION WITH THE PORT OF LISBON**  
(from 1 to 10)

**8,34**

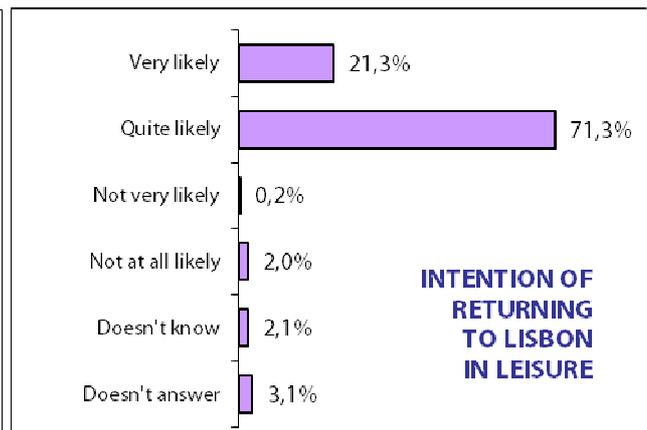
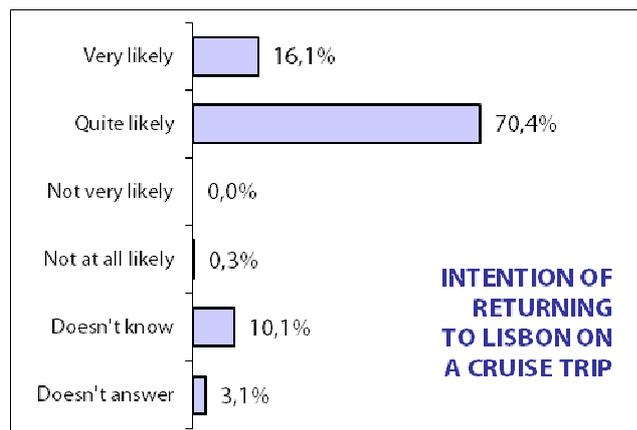
Regarding the expectation previous to their visit to Lisbon, 19,8% of these passengers saw their expectations exceeded (16,1% in 2017).



On a scale from 1 to 10, the average level of satisfaction with the visit to Lisbon was of 8,33 (8,41 in 2017).



86,5% of the passengers considers the return to Lisbon in a cruise trip as likely or very likely, (88,4% in 2017), while 92,6% has the same evaluation of their return to the city in leisure and outside the context of a cruise (97,7% in 2017).



99,8% of the interviewed passengers recommend Lisbon as a port of call. For the recommendation of Lisbon as a global tourism destination that percentage was 99,9%. In 2017, both the percentages were of 100%.



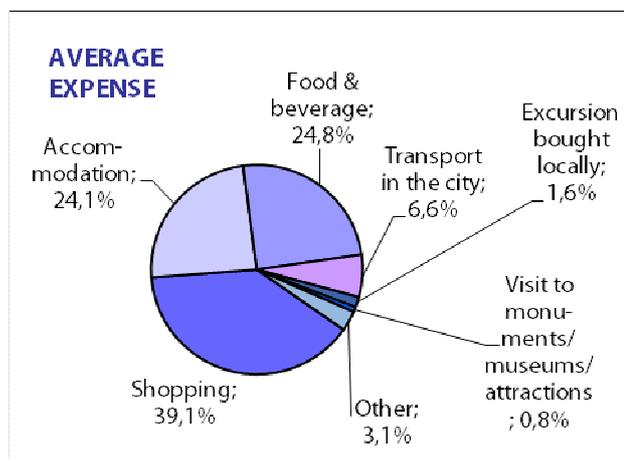
In what concerns their recommendation as a tourism destination, 16,7% of these cruise passengers places Lisbon in the Top 5 destinations to be visited (16,5% in 2017), while 69,2% include Lisbon in the Top 10 (78,3% in 2017).



### EXPENSES

In the 2018 edition of this study, for the subject of expenses, the amount of valid answers was quite low (25,5% of the total), when comparing to 2017 (43,3%). From the gathered information, we were able to obtain an average daily individual expense of **18,88 euros** during their visit to Lisbon (49,31 euros in 2017). One should take into consideration when comparing to last year, that the sample of interviewed passengers chose in larger number to do an organised excursion bought on board and in a lower number to visit the city on their own. The average time spent in Lisbon was also inferior to the one in 2017, with a larger percentage having used the tourism bus to go around the destination.

In 2018, 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.

From the passengers who answered the expenses question, 2,0% said they have had expenses while visiting Monuments, Museums or Attractions (12,7% in 2017), 55,6% of the passengers indicated having spent money on Shopping (87,8% in 2017), 50,0% had expenses on Food & Beverage (57,6% in 2017), 12,9% spent money in Transportation while in Lisbon (31,3% in 2017), and 1,2% says to have bought an excursion in Lisbon (12,9% in 2017). 7,7% had accommodation expenses (16,8% in 2017). And finally, 7,7% affirms having had other non detailed expenses (0,0% in 2017).

EXPENSES	% passengers who had this expense	average cost for the passengers who had this expense (per person)
Visit to monuments/museums / attractions	2,0%	7,23 €
Shopping	55,6%	13,25 €
Food & beverage	50,0%	9,36 €
Transport in the city	12,9%	9,59 €
Excursion bought locally	1,2%	25,00 €
Accommodation	7,7%	59,47 €
Other	7,7%	7,63 €

On average, the individual amounts spent in each component were as follows: Monuments, Museums or Attractions - 7,23 euros (10,56 euros in 2017); Shopping - 13,25 euros (23,77 euros in 2017); Food & Beverage - 9,36 euros (19,38 euros in 2017); Transportation in Lisbon - 9,59 euros (15,47 euros in 2017), Excursion bought locally - 25,00 euros (34,97 euros in 2017), Accommodation - 59,47 (39,08 euros in 2017) and Other - 7,63 euros.

In comparison to the previous year, there is a considerable decrease in the percentages of passengers who had expenses in the several items, the only exception being the Other non detailed expenses. The average value expended was only superior to the 2017 values in the case of Accommodation and Other.