



SURVEY TO CONGRESS PARTICIPANTS

2023

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INTRODUCTION

Bearing in mind the relevancy of the Meetings Industry segment in the positioning of Lisbon as a tourism destination, the Observatório do Turismo de Lisboa developed a study about the Congress segment in Lisbon and the profile of their attendants. This study was interrupted during the COVID-19 pandemic, but we were able to resume it, in similar terms, in 2023.

The company 2ii – Informática e Informação, Lda. did a total of 909 interviews to international congress participants.

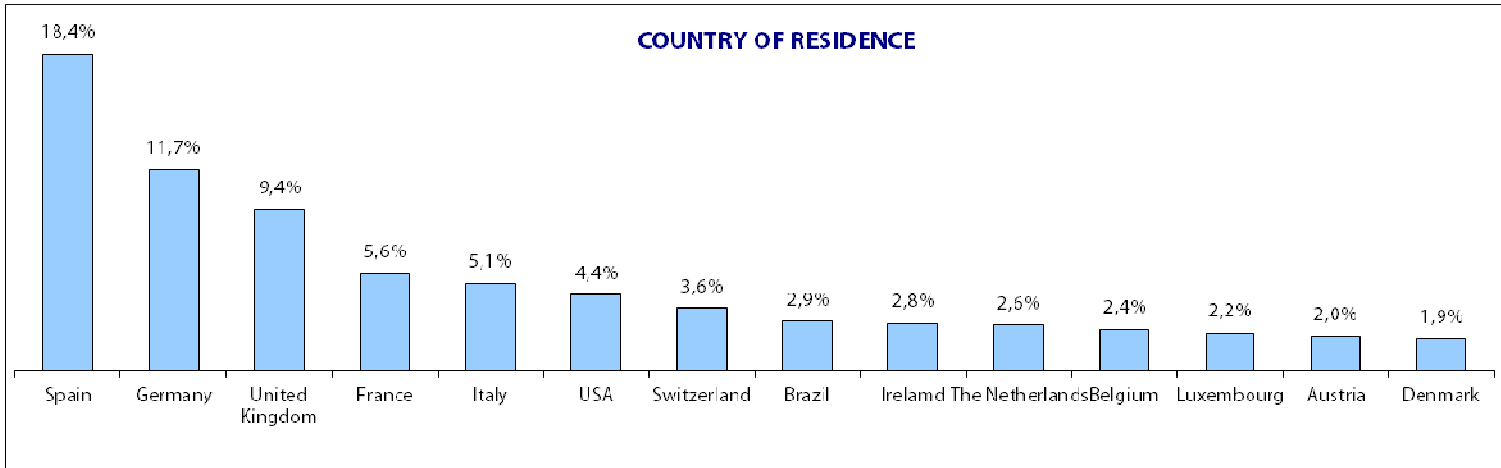
For this edition the following events were under analysis:

- EU PVSEC European Photovoltaic Solar Energy Conference and Exhibition 2023, from 18 to 22 September;
- World Small Animal Veterinary Association Congress WSAVA 2023 + 28th FECAVA Eurocongress, from 27 to 29 September;
- IHF 2023 - 46th World Hospital Congress, from 25 to 27 October, all of them at the Lisbon Congress Centre.

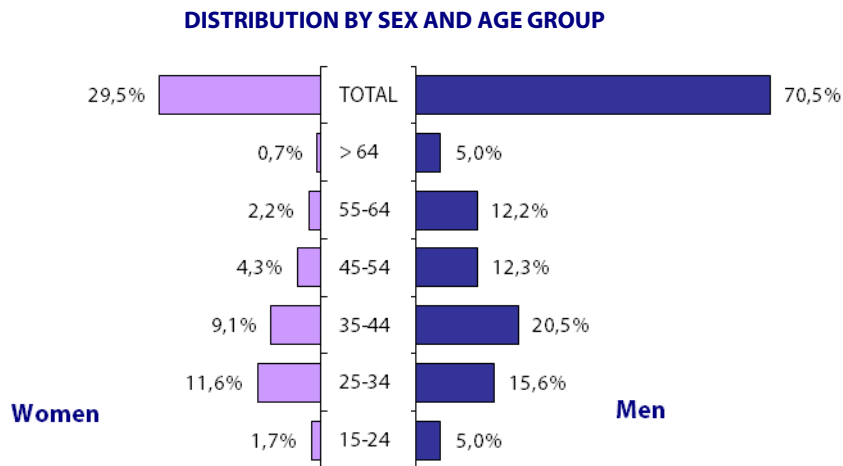
The aim of this report is to make an analysis of the data, highlighting the main conclusions and comparison with the previous year.

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

MAIN RESULTS

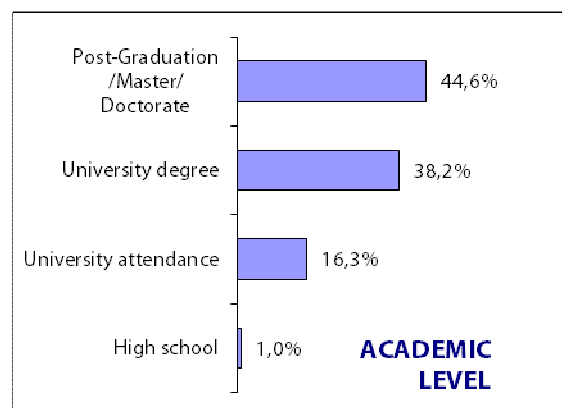


Regarding the country of residence of participants in the congresses under analysis, Spain occupied the first place, followed by Germany and the United Kingdom. In 2019, the weight of these markets were 7,7%; 10,8% and 10,9% respectively.



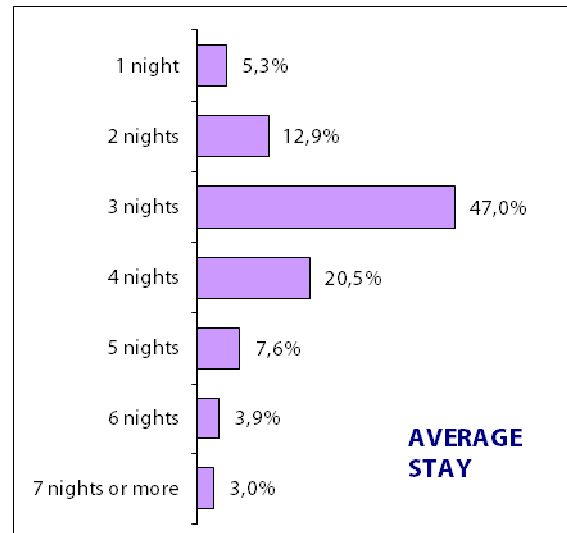
Within the congresses of this study, male participants held a stronger presence over female participants, even comparing to 2019 (63,9%). Regarding the age groups, women were predominantly between 25 and 34 years old, while men were mainly between 35 and 44 years old.

In what concerns the academic level, 44,6% of congress participants hold a post-graduation, master or doctorate (65,1% in 2019).



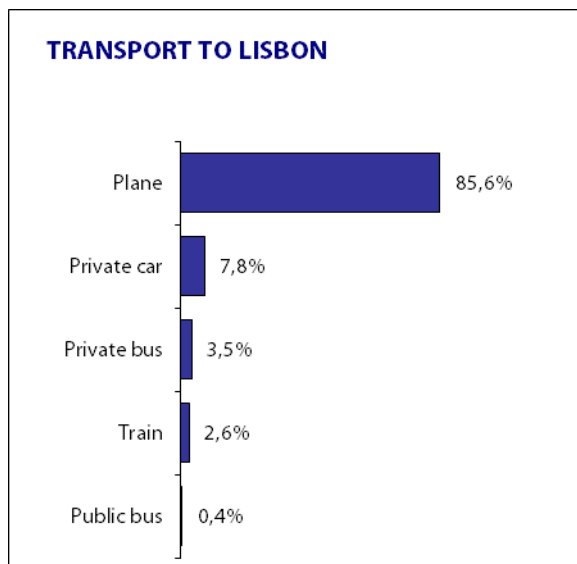
The average stay in the Lisbon Region was of 3,4 nights (3,7 nights in 2019), while 14,4% of the participants in these events stayed 5 or more nights (23,4% in 2019).

ACCOMMODATION	% total
5 ***** Hotel	23,2%
4 **** Hotel	29,1%
4 **** Aparthotel	0,3%
3 *** Hotel	14,4%
2 ** Hotel	1,4%
Local accommodation	29,8%
DK/NA	1,8%
TOTAL	100%



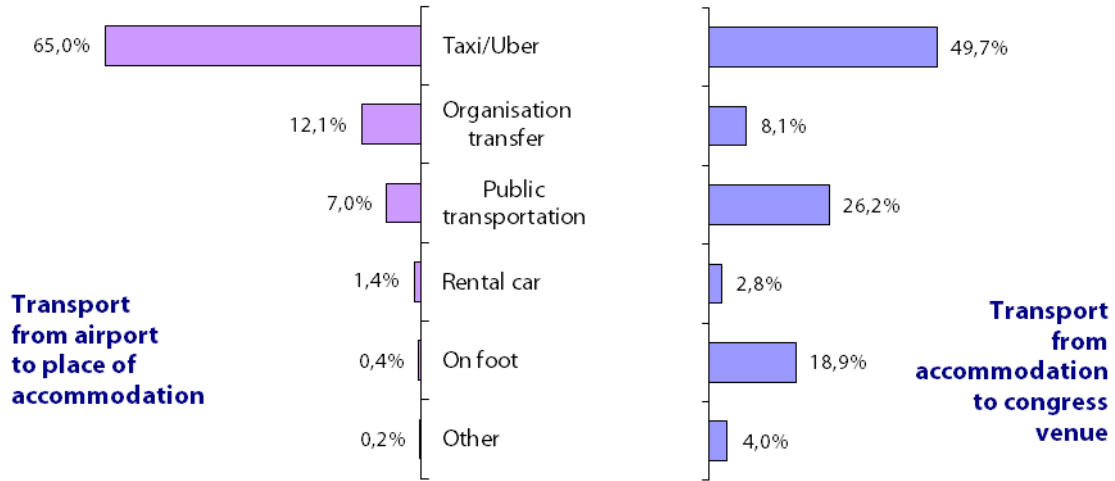
Regarding the choice of accommodation, local accommodation was the option chosen by 29,8% of the interviewed (only 9,6% in 2019). Within hotel establishments, the preference went to 4-star hotel units (which in 2019 took the lead with 60,1%)

TRANSPORT



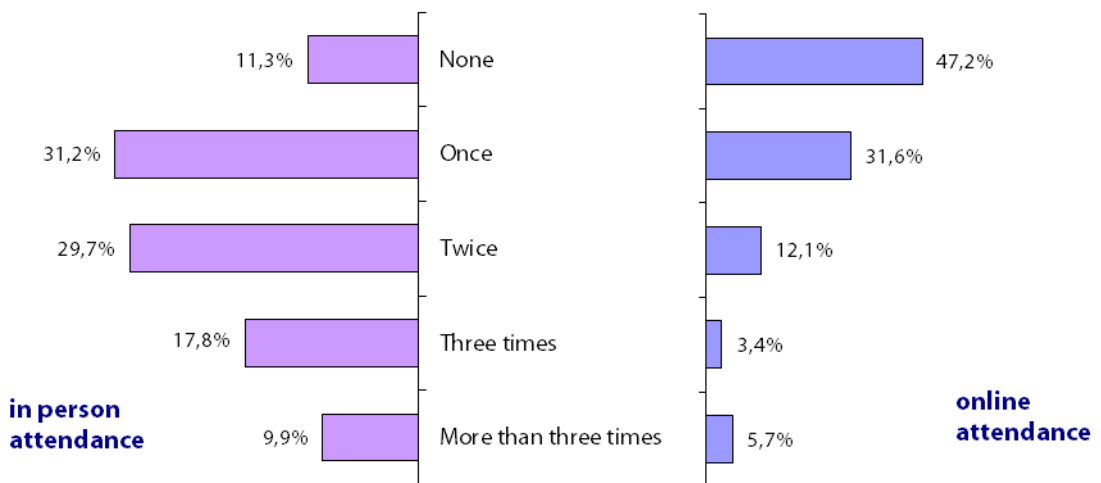
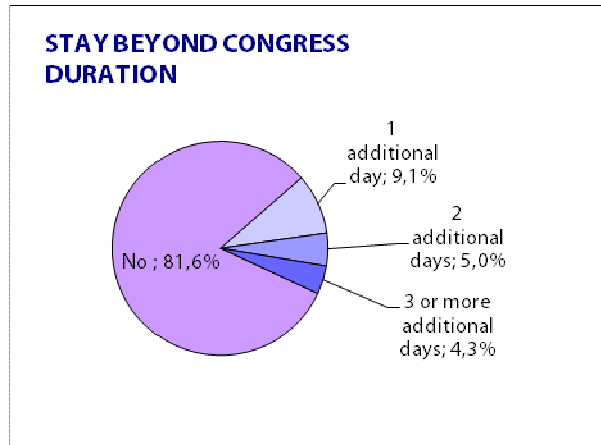
85,6% of congress participants arrived in Lisbon by plane (92,2% in 2019).

The taxi/uber remains the preferred means of transportation both when going from the airport to the hotel (50,5% in 2019) and from the hotel to the congress venue (34,0% in 2019). In the latter, public transportation was the second most used (26,6% in 2019), while in the first, the organisation transfer took precedence (17,6% in 2019).



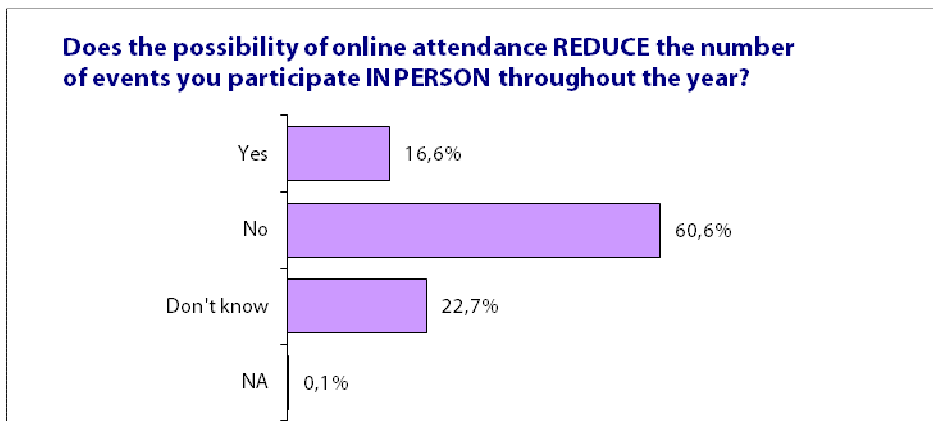
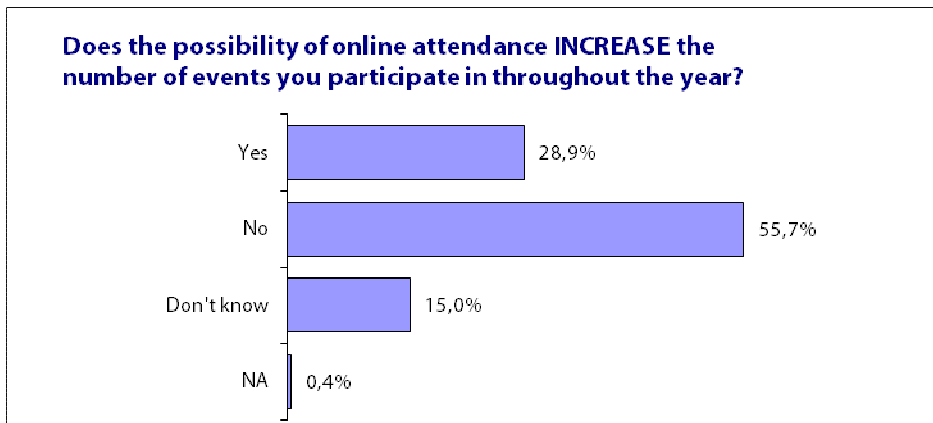
ATTENDANCE TO CONGRESSES

18,4% of congress participants intends to stay in Lisbon beyond the congress duration (32,3% in 2019).



Approximately the same percentage of interviewed participants attends, on average, to 1 congress annually, whether in person (31,2%) or *online* (31,6%). Globally, the attendance is made primarily in person: 88,7% against 52,8% *online*.

When questioned if the possibility of online participation increased the average number of events attended throughout the year, most of the interviewed denied having had any impact. However, 28,9% mentioned that the possibility of online participation gave rise to the total number of congresses attended. Similarly, 16,6% reduced their presence in traditional in person congresses due to the availability of more online or hybrid events.



54,2% of the congress participants had already visited Lisbon previously (43,2% in 2019).

76,6% travelled alone, while 11,7% was accompanied by one other person. In 2019, these percentages were of 53,9% and 18,8%, respectively.



EXPENSES

Of the participants who answered the question regarding their expenses for the attendance to their congress (95% of total), the average value spent was of 1.408,06€ (581,43€ in 2019).

The average stay of these congress participants was of 4,4 days (4,7 days in 2019).

Average stay per participant	4,4 days
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In what concerns the expenses of congress participants, 7 items were under consideration: Transportation and Congress Fee (unique value); Accommodation (value per night); and Local Transportation, Allowances, Shopping 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.

Average expense per participant	
Unique value:	
Transportation	701,88 €
Congress fee	897,74 €
Value per night:	
<small>(for an average stay of 3,4 nights)</small>	
Accommodation	219,54 €
Value per day:	
<small>(for an average stay of 4,4 days)</small>	
Allowances	82,53 €
Local transportation	27,14 €
Shopping	52,12 €
Other	33,67 €
TOTAL	3.206,09 €

Of the congress participants who answered this, 24,1% admitted having had transportation expenses in order to get to Lisbon, having paid an average of 701,88€. The congress fee, admittedly paid by 45,7% of the participants, cost an average of 897,74€. 40,6% had expenses with accommodation, in an average value of 219,54€ per night. Regarding allowances, 74,2% congress participants admitted

having had this expense, paying an average daily value of 82,53€. 58,3% admitted having had local transportation expenses, having paid an average of 27,14€ per day. 52,8% spent money in shopping, on an average daily value of 52,12€. Other expenses, admitted having been paid by 44,1% of congress participants, had an average daily value of 33,67€.

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 **3.206,09€**.

Although there was a slight decrease in the average stay, the global value is 134,2% higher than 2019's (1.368,73€). The items that most grew from the last edition of this study were the congress fee (394%), the allowances (238,8%), the costs of the transport to Lisbon (95%), the accommodation (73,1%) and the local transportation in the destination (51,3%).

EVALUATION

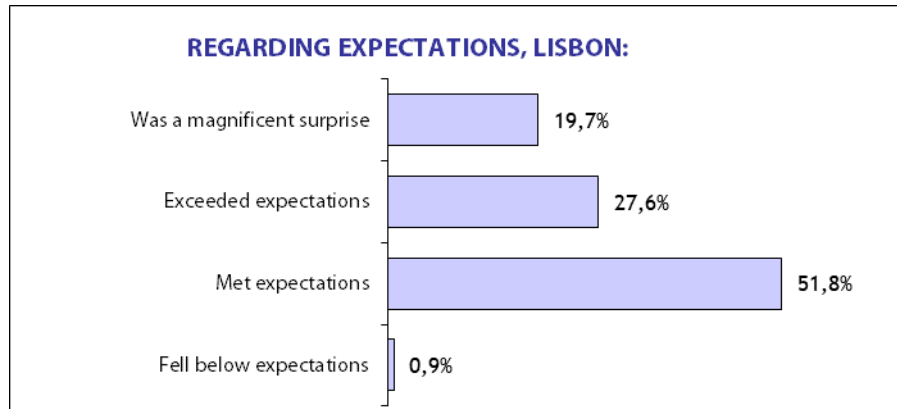
CONGRESS EVALUATION (from 1 to 10)	Spain	Germany	United Kingdom	France	Italy	USA	Switzerland	Brazil	Ireland	The Netherlands	Belgium	Luxembourg	Austria	Denmark	Other	TOTAL
Quality of airport services	8,3	8,2	8,4	8,1	8,3	8,3	8,7	8,4	9,0	7,9	8,2	8,4	7,5	8,6	8,4	8,3
Quality of transportation from airport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

In 2023, the globally most valued criteria in the evaluation of the congresses considered in this study were the Quality of the extra-congress programme, the Functionality of support equipment at the congress venue and the Quality of equipment at the congress venue. In 2019, the best valued criteria were the same, with the first two inverting their positions.

The congress participants who gave the highest average score to their congress experience in Lisbon were the ones from Ireland, Denmark and Switzerland.

The global evaluation of Lisbon as a congress destination is of 9,1, on a scale from 1 to 10 (9,0 in 2019).

Regarding the expectation previous to their visit to Lisbon, 47,3% of these participants saw their expectations exceeded (49,6% in 2019).



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 98% of these congress participants totally or partly agree with them (in 2019, the values were 96,3% and 96,7%, respectively). On a scale from 1 to 5, where 5 means total agreement, the first sentences obtains a level of 4,68 and the second of 4,79.

	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	68,5%	29,6%	0,4%	0,4%	1,0%	98,1%	4,68
Lisbon is a destination that deserves a leisure visit	79,3%	19,1%	0,2%	0,3%	1,0%	98,5%	4,79

When questioned about the probability of returning to Lisbon, (and excluding the “don’t know / no answer” option), 51,7% of congress participants consider their return very likely (41,2% in 2019).

