A Work Project, presented as part of the requirements for the Award of a Masters Degree in Management from the NOVA – School of Business and Economics.

LOW COST CARRIERS: THE CASE OF OPORTO AIRPORT AND ITS TOURISTIC IMPACT IN THE REGION

APPENDIXES

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Student number: 1545

A Project carried out on the Maritime Business course, under the supervision of:

Professor Luís Correia da Silva

January 7th 2015
Appendix 1 – Low cost carriers

1.A – Differences between low-cost and full-service carriers

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Low-cost carrier</th>
<th>Full-service carrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand</td>
<td>One brand; low pricing</td>
<td>Extended brand; price and service</td>
</tr>
<tr>
<td>Price</td>
<td>Simple pricing structure</td>
<td>Complex pricing structure</td>
</tr>
<tr>
<td>Distribution</td>
<td>Internet, direct booking</td>
<td>Internet, direct, and travel organisation</td>
</tr>
<tr>
<td>Checking in</td>
<td>No ticket</td>
<td>No ticket, IATA ticket contract</td>
</tr>
<tr>
<td>Airport</td>
<td>Mostly secondary</td>
<td>Primary</td>
</tr>
<tr>
<td>Network</td>
<td>Point-to-point</td>
<td>Hub-and-spoke</td>
</tr>
<tr>
<td>Classes</td>
<td>One class</td>
<td>Multiple classes</td>
</tr>
<tr>
<td>During flight</td>
<td>Unbundling (pay for ‘extras’)</td>
<td>Bundling (free ‘extras’)</td>
</tr>
<tr>
<td>Aircraft usage</td>
<td>Very intensive</td>
<td>Average - intensive</td>
</tr>
<tr>
<td>Aircraft type</td>
<td>One type</td>
<td>Multiple types</td>
</tr>
<tr>
<td>Turnaround times</td>
<td>25 minutes</td>
<td>Slow; congestion/work</td>
</tr>
<tr>
<td>Product</td>
<td>One product</td>
<td>Multiple integrated products</td>
</tr>
<tr>
<td>Secondary revenue</td>
<td>Advertisement, onboard selling</td>
<td>Focused on primary product</td>
</tr>
<tr>
<td>Seating</td>
<td>Tight, no reservations</td>
<td>Flexible, reservations</td>
</tr>
<tr>
<td>Customer service</td>
<td>Overall bad</td>
<td>Reliable service</td>
</tr>
<tr>
<td>Operational activities</td>
<td>Outsourcing (focused on flying)</td>
<td>Extending (maintenance, cargo)</td>
</tr>
<tr>
<td>Target group</td>
<td>Outsourcing</td>
<td>Tourist and business</td>
</tr>
</tbody>
</table>

Source: O’Connell (2005) and Williams (2001)

1.B – Airlines operating at Porto airport

<table>
<thead>
<tr>
<th>Airlines</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aigle Azur</td>
<td>Paris-Orly</td>
</tr>
<tr>
<td>Air Europa</td>
<td>Madrid</td>
</tr>
<tr>
<td>Air Transat</td>
<td>Toronto-Pearson, Montréal-Trudeau</td>
</tr>
<tr>
<td>British Airways</td>
<td>Londres-Heathrow</td>
</tr>
<tr>
<td>Brussels Airlines</td>
<td>Brussels</td>
</tr>
<tr>
<td>Europe Airpost</td>
<td>Brive Vallée de la Dordogne, Rennes Bretagne</td>
</tr>
<tr>
<td>Flybe</td>
<td>Birmingham</td>
</tr>
<tr>
<td>Iberia – operated by Air Nostrum</td>
<td>Madrid</td>
</tr>
<tr>
<td>Lufthansa</td>
<td>Birmingham</td>
</tr>
<tr>
<td>Luxair</td>
<td>Luxembourg</td>
</tr>
<tr>
<td>SATA Internacional</td>
<td>Ponta Delgada, Terceira, Toronto-Pearson, Munique</td>
</tr>
<tr>
<td>TAP Portugal</td>
<td>Amsterdam, Barcelona, Brussels, Caracas, Geneva, Lisbon,</td>
</tr>
</tbody>
</table>

**TAAG Linhas Aéreas de Angola**

Luanda

**Swiss International**

Zurique, Geneva

**Transavia**

Funchal, Lyon, Nantes, Paris-Orly

**Vueling**

Barcelona, Bruxelas, Paris-Orly


<table>
<thead>
<tr>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Berlin Plc &amp; Co. Luftverkehrs Kg</td>
<td>0.6%</td>
<td>3.5%</td>
<td>3.3%</td>
<td>2.6%</td>
<td>2.1%</td>
<td>2.1%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Brussels Airlines</td>
<td>1.5%</td>
<td>1.3%</td>
<td>1.2%</td>
<td>1.1%</td>
<td>1.0%</td>
<td>0.9%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Clickair, S.A.</td>
<td>2.4%</td>
<td>1.2%</td>
<td>2.9%</td>
<td>4.3%</td>
<td>6.8%</td>
<td>6.7%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Easyjet Airline Company Limited</td>
<td>3.1%</td>
<td>1.6%</td>
<td>1.5%</td>
<td>1.4%</td>
<td>1.3%</td>
<td>1.2%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Flybe Ltd.</td>
<td>8.5%</td>
<td>17.3%</td>
<td>21.5%</td>
<td>24.7%</td>
<td>27.5%</td>
<td>33.1%</td>
<td>38.8%</td>
</tr>
<tr>
<td>Tuifly Gmbh</td>
<td>2.1%</td>
<td>1.9%</td>
<td>1.5%</td>
<td>1.3%</td>
<td>1.2%</td>
<td>1.0%</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

Total Geral: 0.6% 11.8% 21.6% 30.1% 34.3% 36.5% 42.8% 47.8%

Fonte: INAC, I.P.

Legend: 1º LCC, 2º LCC, 3º LCC

Source: INAC - Impacto das Transportadoras Aéreas de Baixo Custo no Transporte Aéreo Nacional [1995-2011]

1.D - Ranking of operating LCC in the regular segment at Faro airport - Passengers Share 2004/2011

<table>
<thead>
<tr>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Berlin Plc &amp; Co. Luftverkehrs Kg</td>
<td>0.1%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>B.M.I. Baby</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Brussels Air (Virgin Express)</td>
<td>2.1%</td>
<td>1.7%</td>
<td>1.5%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Brussels Airlines</td>
<td>1.5%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Condor Flugdienst Gmbh.</td>
<td>3.4%</td>
<td>3.1%</td>
<td>2.1%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
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<tr>
<td>Easyjet Airline Company Limited</td>
<td>21.2%</td>
<td>15.0%</td>
<td>23.2%</td>
<td>22.3%</td>
<td>24.3%</td>
<td>20.3%</td>
<td>20.2%</td>
</tr>
<tr>
<td>Flybe Limited</td>
<td>0.7%</td>
<td>2.2%</td>
<td>2.7%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>0.9%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Germanwings</td>
<td>0.9%</td>
<td>0.9%</td>
<td>1.3%</td>
<td>1.3%</td>
<td>1.4%</td>
<td>1.0%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Iberia (Iberia Express)</td>
<td>2.2%</td>
<td>4.4%</td>
<td>4.5%</td>
<td>5.4%</td>
<td>4.7%</td>
<td>4.2%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Monarch Airlines Ltd</td>
<td>2.5%</td>
<td>11.1%</td>
<td>12.8%</td>
<td>13.2%</td>
<td>11.9%</td>
<td>11.9%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Niki Luftfahrt Gmbh</td>
<td>0.3%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Norwegian Air Shuttle, ASA</td>
<td>0.7%</td>
<td>0.5%</td>
<td>0.5%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>1.0%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Newfly Franchise sp. z o.o. (Centralwings)</td>
<td>0.2%</td>
<td>0.4%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Qy Air Ireland Ltd.</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Ryanair, Ltd.</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Sterling Airlines A/S</td>
<td>0.5%</td>
<td>1.1%</td>
<td>0.8%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Thomsonfly</td>
<td>4.2%</td>
<td>4.5%</td>
<td>5.0%</td>
<td>3.9%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Transavia Airlines, Co.</td>
<td>3.4%</td>
<td>3.0%</td>
<td>4.2%</td>
<td>4.7%</td>
<td>5.0%</td>
<td>4.4%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Tui Fly Gmbh</td>
<td>4.4%</td>
<td>5.2%</td>
<td>4.5%</td>
<td>2.8%</td>
<td>2.7%</td>
<td>2.7%</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

Total Geral: 49.0% 57.9% 54.9% 73.8% 79.4% 76.8% 87.1% 87.0%

Fonte: INAC, I.P.

Legend: 1º LCC, 2º LCC, 3º LCC

Source: INAC - Impacto das Transportadoras Aéreas de Baixo Custo no Transporte Aéreo Nacional [1995-2011]

1.E - Ranking of operating LCC in the regular segment at Lisbon airport - Passengers Share 2004/2011

<table>
<thead>
<tr>
<th>2004</th>
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</thead>
<tbody>
<tr>
<td>Air Berlin Plc &amp; Co. Luftverkehrs Kg</td>
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<td>9.3%</td>
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<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Blue Air Transport Aerial</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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<td>0.2%</td>
</tr>
</tbody>
</table>

Total Cost: 2.9% 5.3% 5.3% 5.3% 5.3% 5.3% 5.3%

Fonte: INAC, I.P.

Source: INAC - Impacto das Transportadoras Aéreas de Baixo Custo no Transporte Aéreo Nacional [1995-2011]
Appendix 2 - The study: tourist profile of Oporto city and the N.R.

2.A – Survey

Tourist Profile of Oporto city and/or North of Portugal

Low-cost airlines

Target population: The target population of this survey are tourists who visited Oporto city and/or North of Portugal and left this destination through Low Cost flights, departing from Sá Carneiro Airport.

Are you travelling with a Low Cost Airline?
☐ Yes
☐ No

Which airline?
☐ Ryanair
☐ Easyjet
☐ Transavia
☐ Vueling Airlines
☐ Air Berlin
☐ Flybe

Gender:
☐ Female
☐ Male

Age:
☐ Under 18
☐ 19 – 25 years
☐ 26 – 30 years
☐ 31 – 40 years
☐ 41- 50 years
☐ 51 – 60 years
☐ 61 – 70 years
☐ More than 70 years

Working status
☐ Self-employed, freelancer
☐ Employed
☐ Unemployed
☐ Student
☐ Housewife/house husband (full time)
☐ Retired
☐ Other: _______________

Marital status:
☐ Married
☐ Single
☐ Divorced
☐ Widow/ Widower
☐ With boyfriend/ girlfriend

Household composition:
☐ I live alone
☐ Live with parents
☐ Live with friends
☐ Live with partner
☐ Live with partner and children – Nº of kids: _____
☐ Other:_________________

Number of household members:
☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ More than 5

Education level:
☐ Until elementary school (5th grade)
☐ Middle School (6th-8th grade)
☐ High school (9th-12th grade)
☐ Superior education
☐ Master’s degree or more

Frequency on air travelling:
☐ 1 time per year
☐ 2/3 times per year
☐ 1 time in 2-5 years
☐ 1 time per month
☐ More than 1 time per month

Country of residence:
☐ Portugal
☐ Spain
☐ France
☐ United Kingdom
☐ Italy
☐ Germany
☐ Netherlands
☐ Switzerland
☐ Brazil
☐ Belgium
☐ Luxemburg
☐ Czech Republic
☐ Austria
☐ Greece
☐ Poland
☐ USA
☐ Other:_________________

Airport of origin/ destination:
☐ Amsterdam
☐ Baden-Baden
☐ Barcelona El Prat
☐ Basel-Mulhouse-Freiburg
Which one of these best describes the main purpose of your visit to Oporto city/ North Region of Portugal?

If leisure:
- Holidays
- Visiting Friends or Relatives
- Studies
- Shopping only
- Cultural event
- Sport event
- Cheap flights
- Other_________________

If businesses:
- Work meeting / business meeting
- Seminar/ Conference/ Congress
- Sales and other services
- Participation on a fair
- Personal reason
- Investigation work
- Studies
- Cultural event
- Other:

Number of days spend in Portugal:
- 1 day
- 2 – 3 days
- 4 -5 days
- 6 – 7 days
- 8-15 days
- more than 15 days

Number of days spend in Oporto and North Region:
- 1 day
- 2 – 3 days
- 4 -5 days
- 6 – 7 days
- 8-15 days
- more than 15 days

Number of days in Oporto city specifically:
- 1 day
- 2 – 3 days
- 4 -5 days
- 6 – 7 days
- more than 7 days

Number of nights at the North Region of Portugal (aside Oporto city):
- 1 day
- 2 – 3 days
- 4 -5 days
- 6 – 7 days
- more than 7 days
Number of persons in your group in this travel:
- 1 (just you)
- 2
- 3
- 4
- 5
- 6 or more

Type of accommodation where you slept in Oporto city:
- Hotel 5*
- Hotel 4*
- Hotel 3*
- Hotel 2*
- Hotel 1*
- Relatives/ Friends’ house
- Pension
- Albergue/ Residential
- Hostel
- House rented
- Touristic apartment
- Inn
- Camping Park
- Boat
- Own house
- Caravan

Type of accommodation where you slept in other localities on the North of Portugal:
- Hotel 5*
- Hotel 4*
- Hotel 3*
- Hotel 2*
- Hotel 1*
- Relatives/ Friends’ house
- Pension
- Albergue/ Residential
- Hostel
- House rented
- Touristic apartment
- Inn
- Camping Park
- Boat
- Own house
- Caravan

Select the localities where you slept:
- Oporto
- Gaia
- Matosinhos
- Gondomar
- Maia
- Valongo
- Braga
- Viana do Castelo
- Guimarães
- Póvoa do Varzim
- Felgueiras
- Régua
- Chaves
- Espinho
- Santo Tirso
- Santa Maria da Feira
- Vale de Cambra
- Lamego
- Famalicão
- Vila Real
- Others:________________

During your stay in Portugal, did you go to other cities of Portugal besides the ones on the North Region?
- Yes
- No

If yes: Which?__________

How many nights did you spend on those in total?_____

Would you still visit them if you did not visit Oporto/North Region of Portugal?
- Yes
- No

Frequency of visits to Oporto and/or North Region:
- None/ First time
- Less than 1 time per year
- 1 time per year
- 2 to 3 times per year
- More than 4 times per year

After your visit, your impression of Oporto city is:
- None
- Not satisfactory
- Satisfactory
- Good
- Very good

After your visit, your impression of North Region of Portugal is:
- None
- Not satisfactory
☐ Satisfactory
☐ Good
☐ Very good

On a scale from 1 to 7, what’s your intention to recommend Oporto and/or North of Portugal to relatives and friends? 1 means very unsatisfied and 7 very satisfied.

When you return home, you will recommend your relatives/friends to visit:
☐ Oporto
☐ North Region of Portugal
☐ Both Oporto and North region
☐ Portugal (in general)
☐ Other cities than Oporto or North Region of Portugal
☐ I will not recommend them to come to Oporto nor North Region of Portugal

On a scale from 1 to 7, what’s your intention to return to Oporto and/or North of Portugal? 1 means very unsatisfied and 7 very satisfied.

If you had the opportunity in the future, you would…
☐ Absolutely visit again Oporto and/or North part of Portugal
☐ Possibly visit again Oporto and/or North part of Portugal in the long future
☐ Visit other Portuguese’ city
☐ I would not visit Oporto and/or North Region of Portugal again

On a scale from 1 to 7, what’s your satisfaction level with this visit to Oporto and/or North of Portugal? 1 means very unsatisfied and 7 very satisfied.

If the low-cost airlines did not exist at Oporto airport, would you be willing to pay more to buy a ticket of a regular airline to visit Oporto and/or North Region?
☐ No
☐ Not now, maybe in the future
☐ Not sure
☐ Yes

Select by order the 4 means of transportation used during the stay at Oporto and/or North Region (put the correspondant letter in each space)
The most used: _____
2nd most used: _____
3rd: _____
4th: _____
a) Taxi
b) Underground
c) Walk by feet
d) Public Bus
e) Bus from excursions companies (ex: sightseeing tours)
f) Train
g) Rented car
h) Own car
i) Car of friends or relatives
j) Company’ car
k) Boat
l) Cruise in Douro river
m) Motorcycle
n) Rented bicycle

Approximated spending total transportation per person (includes ticket’ flights and transportation used during your stay):
☐ <75€
☐ 76 – 150€
☐ 151 – 225€
☐ 226 – 300€
☐ 301 – 375€
☐ 376 – 450€
☐ 451 – 525€
☐ >525€

Average spend per night accommodation and person:
☐ < 20€
☐ 21 – 30€
☐ 31 – 40€
☐ 41 – 50€
☐ 51 – 70 €
☐ 71 – 100€
☐ 101 – 150€
☐ >150€

It was included on a package

Leisure activities during your stay in Oporto City and North Region of Portugal:
☐ Visit the Douro valley
☐ Cruise River on Douro
☐ Visit the Porto Wine Cellars
☐ Experience the gastronomy
☐ Enjoy the landscape
☐ Visit monuments
☐ Buy craftwork and souvenirs
☐ Visit museums
☐ Enjoy the nightlife (Discos, Bars)
☐ Go shopping
☐ Go to the beach
☐ Participate on organized bus tours
☐ Go to cultural events (Concerts, etc)
☐ Assist to sport events
Play Golf

Total spend per person on this trip to Oporto and/or North Region:
- Until 100€
- 101 - 300€
- 301 – 500€
- 501 – 700€
- 701 – 1000€
- 1001€ - 1500€
- 1501 – 2000€
- more than 2000€

The motives that lead you choosing Porto/ North of Portugal to visit were:
- Cheap flights
- Localization
- Weather
- Natural beauty
- Porto Wine
- Price
- Gastronomy
- Culture
- Douro Valley
- Family
- Accommodation
- Get to know the region
- Patrimony
- Friends that live here
- Portuguese heritage
- Nightlife
- Golf
- Studies
- Sports
- Affection

To organize your visit to Oporto and/or North Region of Portugal, you used:
- A travel agency
- The Internet
- Organized by yourself
- Others

On a scale from 1 to 7, what’s your satisfaction regarding the …

<table>
<thead>
<tr>
<th>Where 1 means very unsatisfied and 7 very satisfied…</th>
<th>No</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospitality/sympathy of people</td>
<td></td>
<td></td>
<td></td>
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<td>+</td>
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<tr>
<td>Gastronomy</td>
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<tr>
<td>Accommodation</td>
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<td>Commerce</td>
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<td>Safety</td>
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<td>Weather</td>
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<td>Beaches</td>
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<tr>
<td>Transportation</td>
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<tr>
<td>Information provided to tourists</td>
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<tr>
<td>Natural Parks</td>
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<td>Cleanness</td>
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<tr>
<td>Historic patrimony</td>
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<tr>
<td>Foreign language domain</td>
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<tr>
<td>Nature and landscape</td>
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<tr>
<td>Relation price/quality</td>
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<tr>
<td>Night animation</td>
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<tr>
<td>Cultural events</td>
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<tr>
<td>Sports events</td>
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<td></td>
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<tr>
<td>Airline service and experience</td>
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</tr>
</tbody>
</table>

8
2.B – Reason of this visit to Oporto city and/or North Region of Portugal

![Pie chart showing reasons for visit]

2.C – Low Cost Airline for which tourist that visited Oporto and/or North Region travelled

![Pie chart showing airline preferences]

2.D – Gender distribution of survey respondents

![Pie chart showing gender distribution]

2.E – Age groups distribution of tourists that visit Oporto and/or North Region of Portugal

![Pie chart showing age distribution]

2.F – Working status

![Pie chart showing working status]

2.G – Marital status

![Pie chart showing marital status]
2.H - Household composition

- Live with kids: 4%
- Live with partner: 12%
- I live alone: 6%
- Live with parents: 24%
- Live with friends: 22%
- Live with partner and children: 32%

2.I – Number of household members

- 1: 24%
- 2: 18%
- 3: 12%
- 4: 10%
- 5: 4%
- More than 5: 4%

2.J – Education level

- High school (9th-12th grade): 36%
- Superior education: 52%
- Master’s degree or more: 2%
- Until elementary school (5th grade): 10%

2.K – Frequency on air travelling

- More than 1 time per year: 16%
- 1 time per year: 14%
- 1 time in 2-5 years: 6%
- 1 time per month: 6%
- 2/3 times per year: 52%

2.L – Country of residence

- Germany: 16%
- Brazil: 6%
- France: 20%
- Mexico: 4%
- Litauania: 2%
- Belgium: 40%
- Spain: 6%
- Poland: 8%
- Italy: 4%

2.M – Airport of destination

<table>
<thead>
<tr>
<th>Airport of origin/destination:</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Madrid</td>
<td>20%</td>
</tr>
<tr>
<td>Brussels Zaventem</td>
<td>18%</td>
</tr>
<tr>
<td>Paris (Beauvais)</td>
<td>14%</td>
</tr>
<tr>
<td>Lyon</td>
<td>8%</td>
</tr>
<tr>
<td>Dusseldorf Weeze</td>
<td>6%</td>
</tr>
<tr>
<td>Hamburg</td>
<td>6%</td>
</tr>
<tr>
<td>Paris Orly</td>
<td>4%</td>
</tr>
<tr>
<td>Limoges</td>
<td>4%</td>
</tr>
<tr>
<td>Marselha (Marseille)</td>
<td>4%</td>
</tr>
<tr>
<td>Dortmund</td>
<td>4%</td>
</tr>
<tr>
<td>Paris Charles de Gaulle</td>
<td>2%</td>
</tr>
<tr>
<td>Dublin</td>
<td>2%</td>
</tr>
<tr>
<td>Brussels Charleroi</td>
<td>2%</td>
</tr>
<tr>
<td>Tours</td>
<td>2%</td>
</tr>
<tr>
<td>Carcassone</td>
<td>2%</td>
</tr>
<tr>
<td>Bologna</td>
<td>2%</td>
</tr>
</tbody>
</table>
2. N – Reason for visit to Oporto city/ North Region of Portugal

2. O – Reason that best describes the main purpose of visit to Oporto city and N.R.

2. P – Numbers of days spend in Portugal

2. Q – Numbers of days/ nights spent in North Region, Oporto and both

2. R – Number of persons in the group travel

2. S – Type of accommodation chosen in Oporto city and in other localities on N.P.
2. T – Localities chosen for sleeping by tourists

<table>
<thead>
<tr>
<th>Locality chosen for sleeping</th>
<th>Number of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oporto</td>
<td>40</td>
</tr>
<tr>
<td>Esposende</td>
<td>1</td>
</tr>
<tr>
<td>Gaia</td>
<td>3</td>
</tr>
<tr>
<td>Aveiro</td>
<td>3</td>
</tr>
<tr>
<td>Vila Real</td>
<td>4</td>
</tr>
<tr>
<td>Orbacém</td>
<td>3</td>
</tr>
<tr>
<td>Maia</td>
<td>1</td>
</tr>
<tr>
<td>Póvoa do Varzim</td>
<td>2</td>
</tr>
<tr>
<td>Lamego</td>
<td>2</td>
</tr>
<tr>
<td>Vila do Conde</td>
<td>2</td>
</tr>
<tr>
<td>Guimaraes</td>
<td>2</td>
</tr>
<tr>
<td>Nazaré</td>
<td>1</td>
</tr>
<tr>
<td>Chaves</td>
<td>1</td>
</tr>
<tr>
<td>Felgueiras</td>
<td>1</td>
</tr>
<tr>
<td>Pomares</td>
<td>1</td>
</tr>
<tr>
<td>Régua</td>
<td>1</td>
</tr>
<tr>
<td>Viana do Castelo</td>
<td>1</td>
</tr>
</tbody>
</table>

2. U – Frequency of visits to Oporto and/or North Region

![Pie chart showing frequency of visits]

2. W – Percentage of tourist which visited other cities of Portugal (besides N.R. localities)

<table>
<thead>
<tr>
<th>Question</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>During your stay in Portugal, did you go to other cities of Portugal besides the ones on the North Region?</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>33%</td>
</tr>
<tr>
<td>No</td>
<td>67%</td>
</tr>
</tbody>
</table>

2. X – Intention to recommend to return and to recommend to relatives

![Bar chart showing intention to recommend]

2. Y – Prospects for future visits

![Circle chart showing future prospects]

2. Z – Satisfaction level with the visit to Oporto and/or N.P.

![Bar chart showing satisfaction level]
2.AA – Tourists impression of Oporto and N.R.

2.AB – Satisfaction level of each dimension

2.AC – Intention to recommend a visit to Oporto and/or N.P. to friend and relatives in a scale of 1 to 7

2.AD – Intention to recommend visit to Oporto and/or N.P. to friend and relatives

2.AE – Preferred transportation means by tourists

2.AF – Leisure activities during visit
2.AG – Total spending in visit Oporto and/or N.P.

2.AH – Approximated total spending in transportation per person (includes ticket, flights and transportation used during your stay)

2.AJ – How tourists organized the visit to the region

2.AK – Reasons for visiting Oporto and/or N.R.

2.AI - Average spend per night accommodation and person
2. AI. - Intention to travel with a FSC to Oporto airport if LCC did not exist.

![Survey](image)

Appendix 3 - Oporto and the North of Portugal as a tourism destination

3.A. - Development axis in the touristic sector contemplated in the “Plano de Gestão: centro histórico do Porto Património Mundial”

<table>
<thead>
<tr>
<th>III – TURISMO</th>
<th>7. Valorizar Recursos Paisagísticos e Patrimoniais</th>
<th>A) Valorização Patrimonial</th>
<th>B) Valorização Paisagem</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>32. Recreia Momentos Históricos</td>
<td>33. Dinamização Novos Percursos Temáticos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>34. Revitalização Festas Tradicionais</td>
<td>35. Requalificação Miradouros</td>
</tr>
<tr>
<td></td>
<td></td>
<td>36. Percurso Muralha Fernandina e Sta Clara</td>
<td>37. TIC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>38. Welcome Centre</td>
<td>39. Agentes &quot;I can help&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>40. Qualificação Restauração</td>
<td>41. Qualificação Circuitos Turísticos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>42. Sinalética de Orientação e Interpretação</td>
<td>43. Revitaliz. dos Existentes e Criação de Novos Esp. Museológicos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>44. Revitaliz. Mercado Ferreira Borges</td>
<td>45. Reforço Oferta Hoteleira</td>
</tr>
</tbody>
</table>

3.B – Hostels definition

Hostels provide short-term budget accommodation to individual travelers or groups, who stay in beds usually in a bunk-style room shared with other guests (Bunda, 2014). In general this market segmentation is associated to young, adventure cost-conscious travelers, but the large offer in this accommodation segment has led to the creation of more specific characteristics that take into account personal tastes (for instance, Rivoli Cinema Hostel in Oporto was the first hostel in Portugal to have cinema as an inspiration theme).

3.C – Evolution of the number of passengers in Douro

![Graph showing the evolution of the number of passengers in Douro from 2007 to 2013.](image)

Source: IPTM – Estatísticas- Dados da Via Navegável do Douro 2013

3.D - Initiative.PT 2.0

There are several entities that collaborate in attracting more passengers and promoting new routes in Portuguese airports, such as Tourism of Portugal and regional agencies for tourism promotion. The Initiative.PT 2.0 originates from this context and through partnership between Tourism of Portugal, ANA and ANAM – “Aeroportos e Navegação Aérea da Madeira, SA”. This program consists of a project “aimed at attracting or developing air routes of tourist interest for Portugal, which promote increased passenger flows and the generation of tourism business for national destinations” (ANA Routlab, 2013). More specifically, Initiative.PT 2.0 is the latest model built on this program, defining as its priority axis: seasonality reduction; speeding up the colocation of routes with low supply and expanding the network connection to markets.

In order to be qualified to participate, there are several conditions for applicants to follow. For example, routes have to be part of the National Plan of Tourism Promotion of each region and they are restricted to certain supply
conditions, but also to periodicity and capacity standards. Among eligible projects, air routes can be included in New City Pair Routes, Replacement Routes and Operations and Experimental Routes (see definition for each concept in appendix 3.E)

The conditions for eligible projects may be subjected to variations according to the specifications and objectives of each airport. For the Oporto Airport case, the qualification of the supported routes is conditioned to a minimum of two frequencies/week and to routes operated with aircrafts whose capacity is above 100 seats.

As to the granted support, it consists of a financial contribution to co-finance the campaigns involved with the launch of the route or to strengthen its operation (depending on the situation). The promotional campaign aims to develop the tourist traffic to national destinations and it should be directed to consumers, according to the communication plan previously arranged with the national destination. In addition to this financial support, and in the case of New City Pairs Routes, there is also the possibility of being elected to a performance award. For cases where annual plans of route promotion and destination are implemented - developed by regional tourism entities - the financial support may be increased beyond the established co-financing and subject to adjustments according to route relevance and priority. Finally, it is relevant to point out the entities that contribute to financial support and their percentage contributions: Turismo de Portugal, I.P. (30%); Regional tourism entities (20%); ANA - Aeroportos de Portugal, S.A. or ANAM - Aeroportos e Navegação Aérea da Madeira, S.A. (50%). As for the performance awards, they are ensured by ANA - Aeroportos de Portugal, S.A. or by ANAM - Aeroportos e Navegação Aérea da Madeira, S.A.

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1 The program can contemplate application projects to access the support under the Initiative.pt 2.0, for airline companies but also tour operators (for the charter operation case) when they assume the majority of the operation risk.
2 See the strategic matrix of the National Plan of Tourism Promotion for Oporto and the North in appendix 3.F.
3 The performance award is measured according to the number of passengers and by taking into consideration the destination airport, flight sector and IATA season when the route operates.
3.E – Definitions of New city pair route, Replacement route and Experimental route, according with Initiative.pt 2.0 program

“3. For the purposes of the preceding number, these terms are defined as follows:

a) New city pair route – when, for at least 3 consecutive years, there has been no scheduled operation or, in the case of the airports of Faro, Funchal, Porto Santo and Ponta Delgada, no charter operation, between the targeted national airport and the metropolitan area where the international airport is located;

b) Replacement route – route which replaces a city pair route which has not been operated for at least 12 consecutive months;

c) Experimental route – new city pair route that, in the launch year, is temporarily interrupted during the IATA season subsequent to that of its initial season, in which case the support to the launch campaign or strengthening of the operation in the target markets is only given upon the annual re-starting of the route. “


3.F.- Matrix of the National Plan of Tourism Promotion for Porto and North