

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

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Appendix 1 – Low cost carriers

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

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

Source: O'connell (2005) and Williams (2001)

1.B – Airlines operating at Porto airport

Airlines	Destinations
Aigle Azur	Paris-Orly
Air Europa	Madrid
Air Transat	Toronto-Pearson, Montréal-Trudeau
British Airways	Londres-Heathrow
Brussels Airlines	Brussels
EasyJet	Basel-Mulhouse, Genebra, London-Gatwick, Lyon, Paris-Charles de Gaulle, London-Luton, Toulouse, Nantes, Manchester, Bristol
Europe Airpost	Brive Vallée de la Dordogne, Rennes Bretagne
Flybe	Birmingham
Iberia – operated by Air Nostrum	Madrid
Lufthansa	Birmingham
Luxair	Luxembourg
Ryanair	Barcelona, Berlim-Schönefeld, Beauvais, Bergamo, Bordéus, Bruxelas, Châlons Vatry, Charleroi, Dole, Dortmund, Eindhoven, Faro, Hahn, Hamburgo, Karlsruhe/Baden-Baden, Lile, Lisboa, Londres-Stansted, Madrid, Marselha, Memmingen, Roma-Ciampino, Saint-Étienne, Estrasburgo, Tours, Weeze Seasonal:: Bologna, Bremen, Carcassonne, Clermont-Ferrand, Dublin, Gran Canaria, La Rochelle, Limoges, Liverpool, Maastricht/Aachen, Palma de Mallorca, Rennes, Valência
SATA Internacional	Ponta Delgada, Terceira, Toronto-Pearson, Munique
TAP Portugal	Amsterdam, Barcelona, Brussels, Caracas, Geneva, Lisbon,

	London-Gatwick, Luxembourg, Madeira, Madrid, Milan-Malpensa, Newark, Paris-Orly, Rio de Janeiro, Rome-Fiumicino, São Paulo-Guarulhos, Zurich. Seasonal: Porto Santo
TAAG Linhas Aéreas de Angola	Luanda
Swiss International	Zurique, Geneva
Transavia	Funchal, Lyon, Nantes, Paris- Orly
Vueling	Barcelona, Bruxelas, Paris-Orly

1.C – Ranking of operating LCC in the regular segment at Porto airport - Passengers Share 2004/2011

	2004	2005	2006	2007	2008	2009	2010	2011
Air Berlin PLC & Co. Luftverkehrs KG	0,6%	3,5%	3,3%	2,6%	2,1%	2,1%	1,8%	1,2%
Brussels Airlines				1,5%	1,5%	1,2%	1,1%	1,1%
Clickair, S.A.				2,4%	1,2%			
Easyjet Airline Company Limited					2,9%	4,3%	6,8%	6,7%
Hapag-Lloyd Express GmbH			1,6%					
Ryanair, Ltd.		8,3%	16,7%	21,5%	24,7%	27,5%	33,1%	38,8%
Tuifly GmbH				2,1%	1,9%	1,5%		
Total Geral	0,6%	11,8%	21,6%	30,1%	34,3%	36,5%	42,8%	47,8%

Fonte: INAC, I.P.

Legenda:

- 1ª LCC
- 2ª LCC
- 3ª 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

	2004	2005	2006	2007	2008	2009	2010	2011
Air Berlin PLC & Co. Luftverkehrs KG	6,1%	5,1%	4,6%	5,3%	6,6%	6,0%	5,6%	4,5%
B.M.I. Baby	0,3%	0,8%	1,1%	1,9%	2,4%	2,2%	2,8%	2,3%
Brussels Air Fly (Virgin Express)	2,1%	1,7%	1,5%	0,1%				
Brussels Airlines				1,1%	1,1%	1,1%	0,9%	0,8%
Condor Flugdienst, GmbH.	3,4%	3,1%	2,1%	0,4%				
Easyjet Airline Company Limited	21,7%	19,1%	21,1%	22,1%	26,9%	28,3%	25,0%	22,1%
Flybe Limited	0,7%	2,2%	2,7%	1,1%	1,1%	0,9%	0,8%	0,6%
Germanwings GmbH.	0,9%	1,0%	1,1%	1,3%	1,4%	1,0%	0,9%	0,8%
Jet2.com (Channel Express)	2,6%	4,4%	4,5%	5,4%	4,7%	4,2%	4,5%	6,1%
Monarch Airlines Ltd	9,9%	11,1%	12,8%	13,2%	11,9%	11,0%	9,5%	10,3%
Niki Luftfahrt, GmbH.	0,3%	0,1%						0,1%
Norwegian Air Shuttle, ASA	0,7%	0,5%	0,5%	0,4%	0,4%	1,0%	1,3%	1,1%
Nowy Przewoźnik Sp. z o.o. (Centralwings)		0,2%	0,4%	0,3%	0,7%			
Oy Air Finland, Ltd.		0,1%						
Ryanair, Ltd.	0,2%	0,3%	3,3%	6,8%	7,4%	14,2%	28,7%	30,9%
Sterling Airlines A/S		0,5%	1,1%	0,8%	1,1%			
Thomsonfly		4,2%	4,5%	5,0%	3,9%	0,3%		
Transavia Airlines, Cv.		3,6%	3,9%	4,2%	4,7%	5,0%	4,4%	4,5%
Tuifly GmbH				4,4%	5,2%	4,5%	2,8%	2,7%
Total Geral	49,0%	57,9%	65,3%	73,8%	79,6%	79,8%	87,1%	87,0%

Fonte: INAC, I.P.

Legenda:

- 1ª LCC
- 2ª LCC
- 3ª 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

	2004	2005	2006	2007	2008	2009	2010	2011
Air Berlin PLC & Co. Luftverkehrs KG	0,2%	1,0%	0,2%	0,2%	0,1%	0,0%		
B.M.I. Baby				0,2%	0,4%	0,1%	0,1%	0,1%
Blue Air Transport Aerian				0,1%	0,2%	0,2%	0,2%	0,1%
Brussels Air Fly (Virgin Express)	1,6%	1,5%	1,5%	0,3%				
Brussels Airlines				1,5%	1,5%	1,3%	1,1%	1,0%
Clickair, S.A.			0,1%	1,3%	0,8%	0,3%		
Easyjet Airline Company Limited			1,9%	3,7%	6,7%	8,0%	8,6%	9,2%
Germanwings GmbH.	1,1%	1,5%	1,4%	1,2%	1,2%	0,8%	0,8%	0,7%
Monarch Airlines Ltd		0,5%	0,9%	0,6%				
Niki Luftfahrt, GmbH.		0,1%	0,8%	0,8%	0,8%	0,8%	0,7%	0,6%
Nowy Przewoźnik Sp. z o.o. (Centralwings)		0,2%	0,3%	0,2%	0,1%			
Sterling Airlines A/S			0,3%					
SkyEurope Airlines, A.S.				0,1%	0,4%	0,3%		
Thomsonfly				0,2%				
Transavia Airlines, Cv.								0,5%
Vueling Airlines, S.A.		0,4%	1,7%	2,6%	2,1%	2,1%	1,7%	1,5%
Low Cost	2,9%	5,3%	9,2%	13,1%	14,3%	13,9%	13,3%	13,7%

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 – N° 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

- ☐ Berlin Schönefeld
- ☐ Birmingham
- ☐ Bologna
- ☐ Bourdeaux
- ☐ Bremen
- ☐ Brussels Zaventem
- ☐ Brussels Charleroi
- ☐ Carcassone
- ☐ Clermont Ferrand
- ☐ Dole
- ☐ Dortmund
- ☐ Dublin
- ☐ Dusseldorf Weeze
- ☐ Eindhoven
- ☐ Faro
- ☐ Frankfurt-Hahn
- ☐ Funchal
- ☐ Grand Canária
- ☐ Geneva
- ☐ Hamburg
- ☐ La Rochelle
- ☐ Lille
- ☐ Limoges
- ☐ Lisbon
- ☐ Liverpool
- ☐ London Gatwick
- ☐ London Stansted
- ☐ Lyon
- ☐ Maastricht
- ☐ Madrid
- ☐ Marselha (Marseille)
- ☐ Memmingen
- ☐ Milan Bergamo
- ☐ Nantes
- ☐ Palma
- ☐ Paris (Beauvais)
- ☐ Paris Charles de Gaulle
- ☐ Paris Orly
- ☐ Paris (Vatry)
- ☐ Poitiers
- ☐ Rennes
- ☐ Rome Campino
- ☐ St Etienne
- ☐ Strasbourg
- ☐ Tenerife (South)
- ☐ Toulouse
- ☐ Tours
- ☐ Valencia

Reason for trip:

- ☐ Leisure/ vacations
- ☐ Businesses/ Work

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

During your stay you slept at:

- ☐ Grand Oporto only (includes: Porto; Espinho; Gondomar; Maia; Matosinhos; Póvoa de Varzim; Santo Tirso; Trofa; Valongo; Vila do Conde; Vila Nova de Gaia)
- ☐ North of Portugal
- ☐ Both Grand Oporto and North of Portugal

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.

1 2 3 4 5 6 7

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.

1 2 3 4 5 6 7

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.

1 2 3 4 5 6 7

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/ North Region (put the correspondent 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

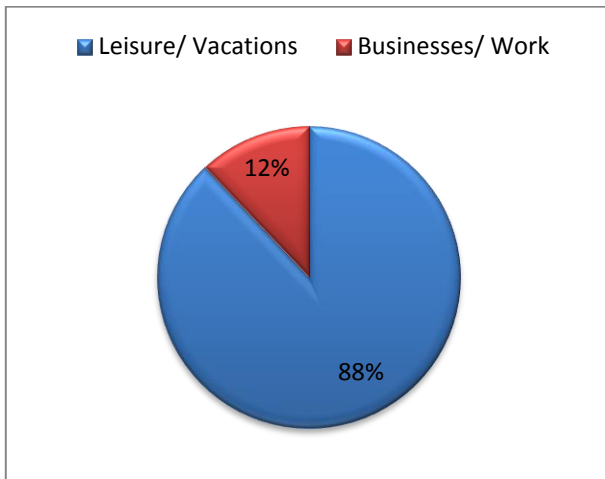
☐ Organized by yourself

☐ Others

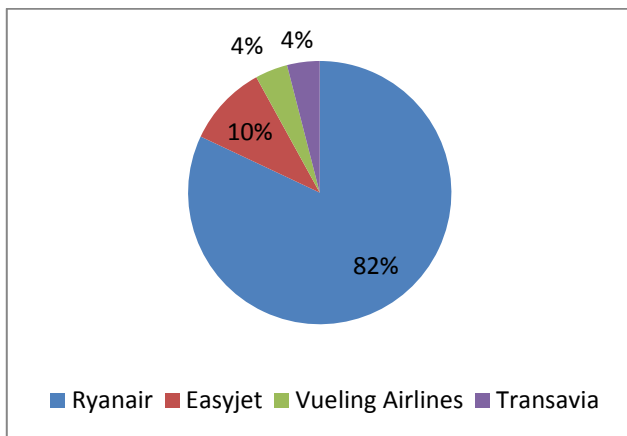
On a scale from 1 to 7, what's your satisfaction regarding the ...

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

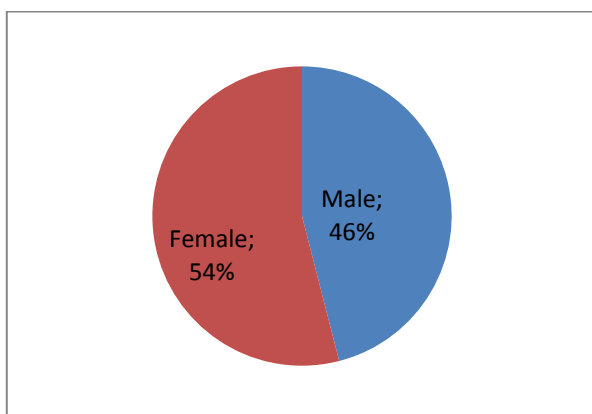
2.B –Reason of this visit to Oporto city and/or North Region of Portugal



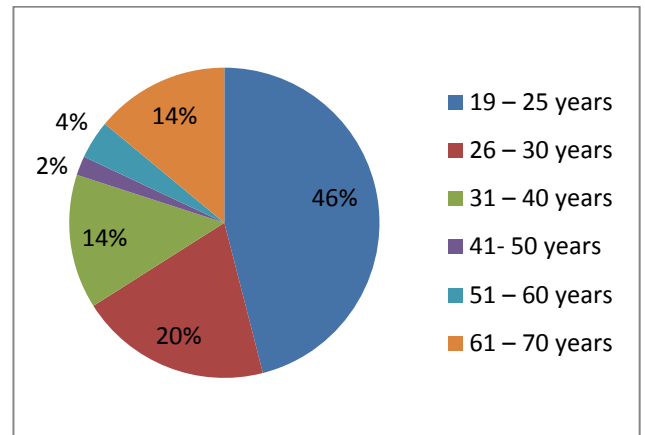
2.C – Low Cost Airline for which tourist that visited Oporto and/or North Region travelled



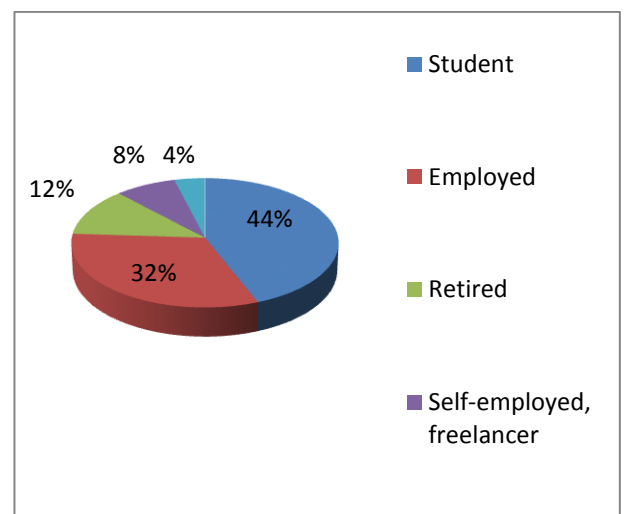
2.D – Gender distribution of survey' respondents



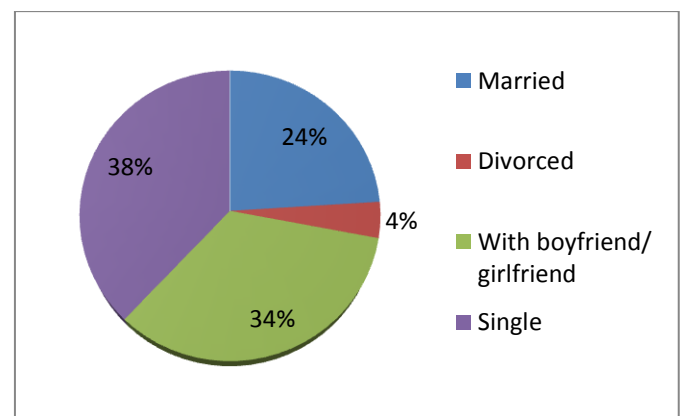
2.E – Age groups distribution of tourists that visit Oporto and/or North Region of Portugal



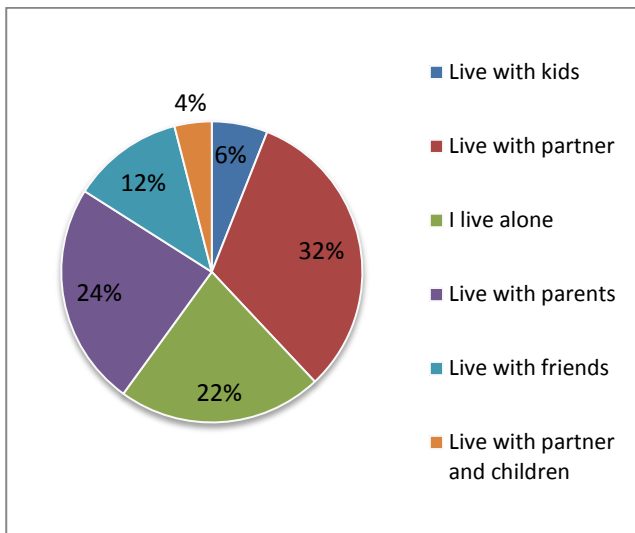
2.F – Working status



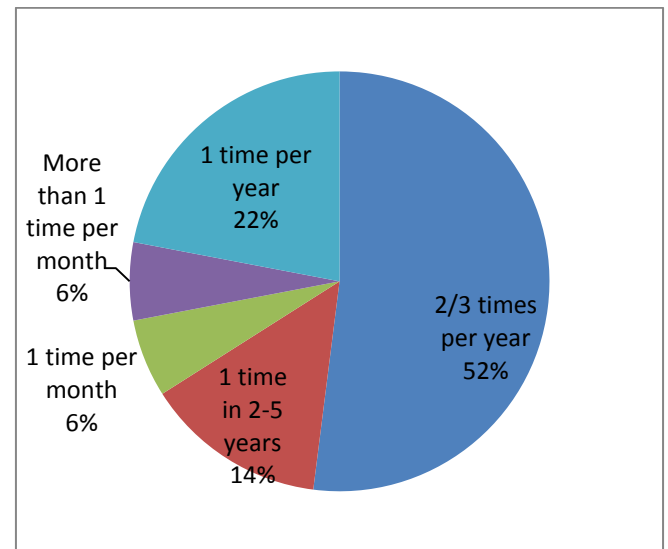
2.G – Marital status



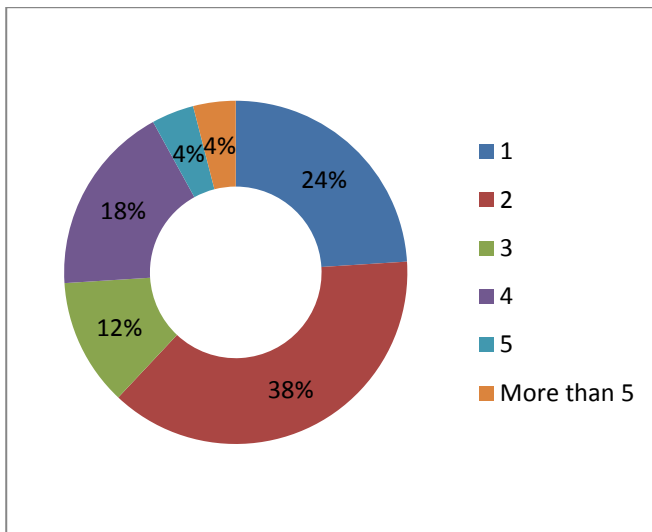
2.H - Household composition



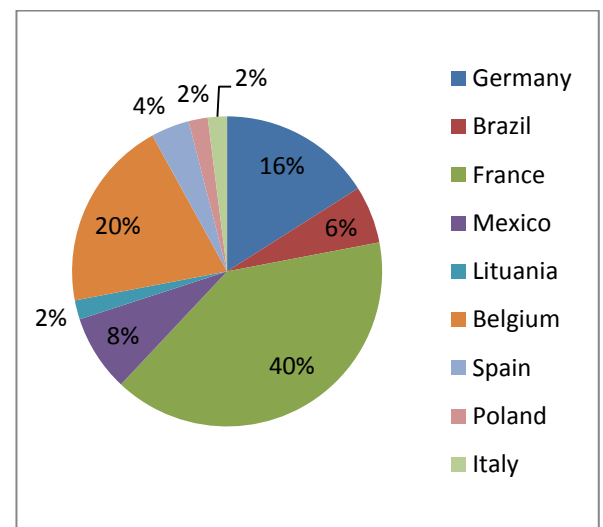
2.K – Frequency on air travelling



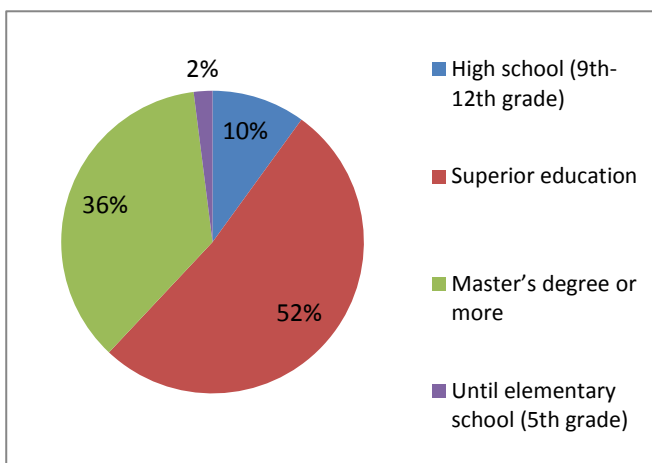
2.I – Number of household members



2.L – Country of residence



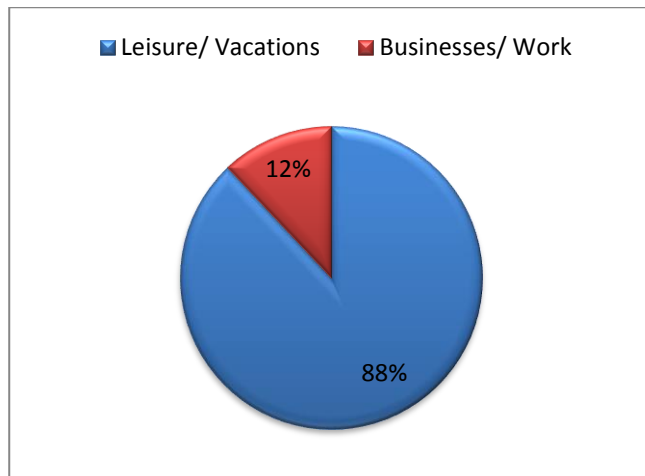
2.J – Education level



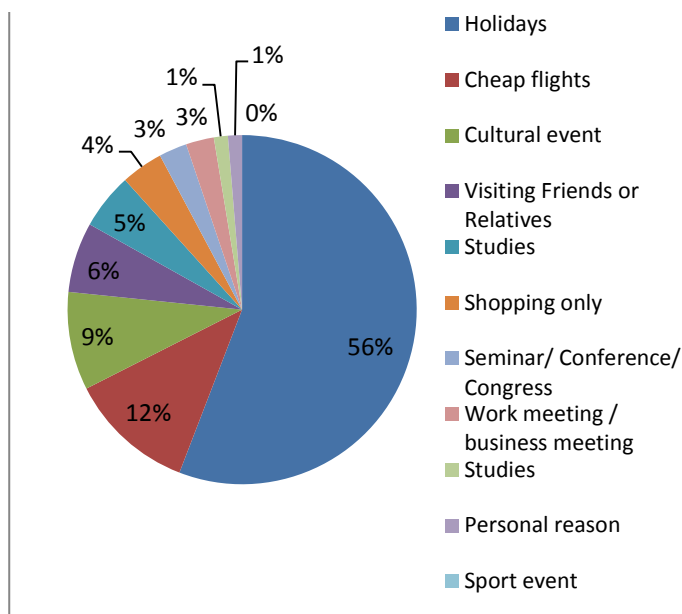
2.M – Airport of destination

Airport of origin/ destination:	%
Madrid	20%
Brussels Zaventem	18%
Paris (Beauvais)	14%
Lyon	8%
Dusseldorf Weeze	6%
Hamburg	6%
Paris Orly	4%
Limoges	4%
Marselha (Marseille)	4%
Dortmund	4%
Paris Charles de Gaulle	2%
Dublin	2%
Brussels Charleroi	2%
Tours	2%
Carcassone	2%
Bologna	2%

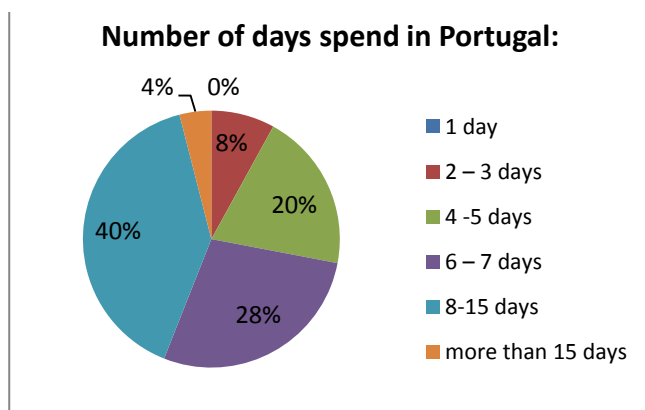
2.N – Reason for visit to Oporto city/ North Region of Portugal



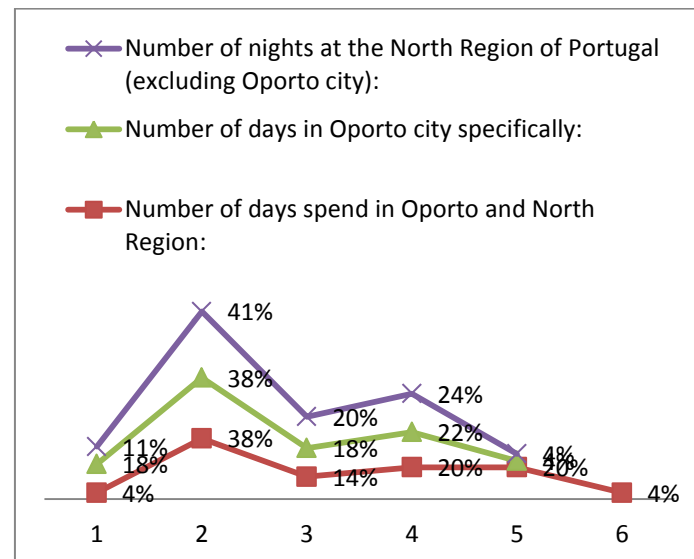
2.O – Reason that best describes the main purpose of visit to Oporto city and N.R.



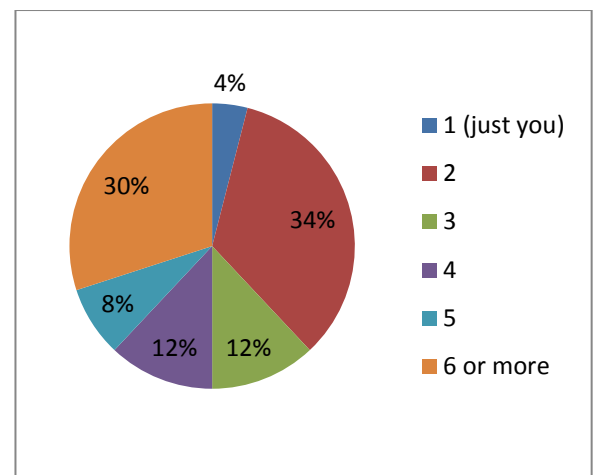
2.P – Numbers of days spend in Portugal



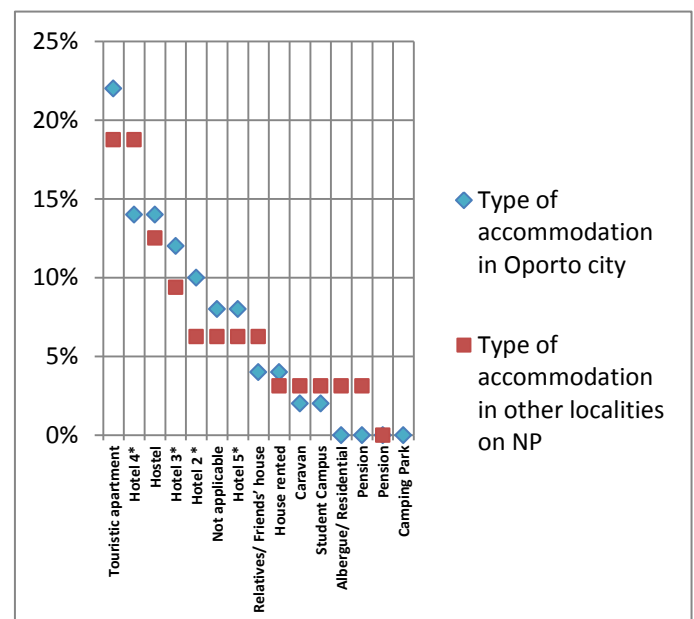
2.Q - Numbers of days/ nights spent in North Region, Oporto and both



2.R – Number of persons in the group travel



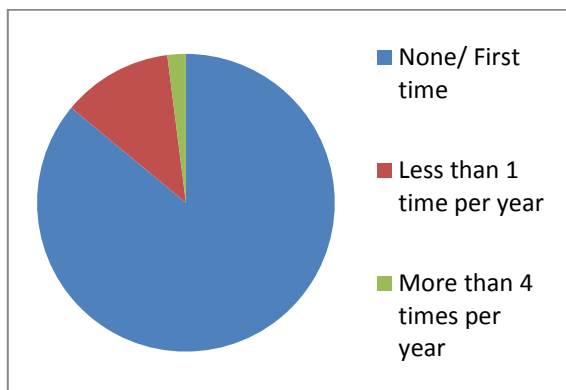
2.S – Type of accommodation chosen in Oporto city and in other localities on N.P.



2.T – Localities chosen for sleeping by tourists

Locality chosen for sleeping	Number of responses
Oporto	40
Esposende	1
Gaia	3
Aveiro	3
Vila Real	4
Orbacém	3
Maia	1
Póvoa do Varzim	2
Lamego	2
Vila do Conde	2
Guimarães	2
Nazaré	1
Chaves	1
Felgueiras	1
Pomares	1
Régua	1
Viana do Castelo	1

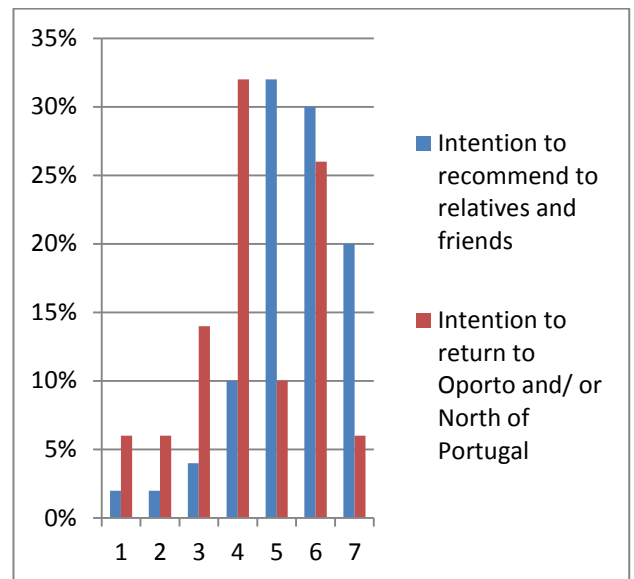
2.U - Frequency of visits to Oporto and/or North Region



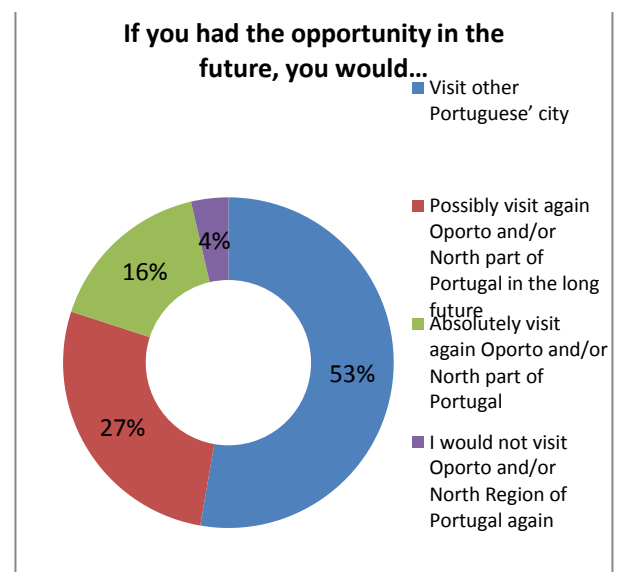
2.W – Percentage of tourist which visited other cities of Portugal (besides N.R. localities)

During your stay in Portugal, did you go to other cities of Portugal besides the ones on the North Region?	%
Yes	33%
No	67%

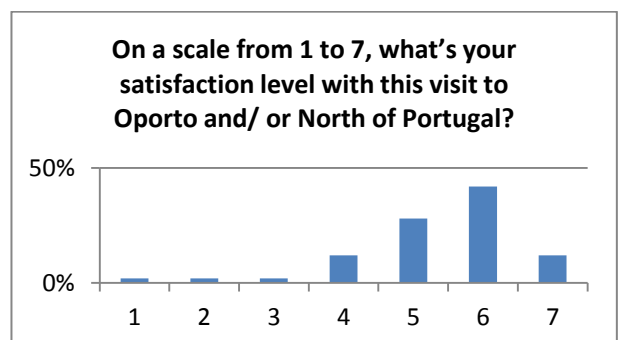
2.X – Intention to recommend to return and to recommend to relatives



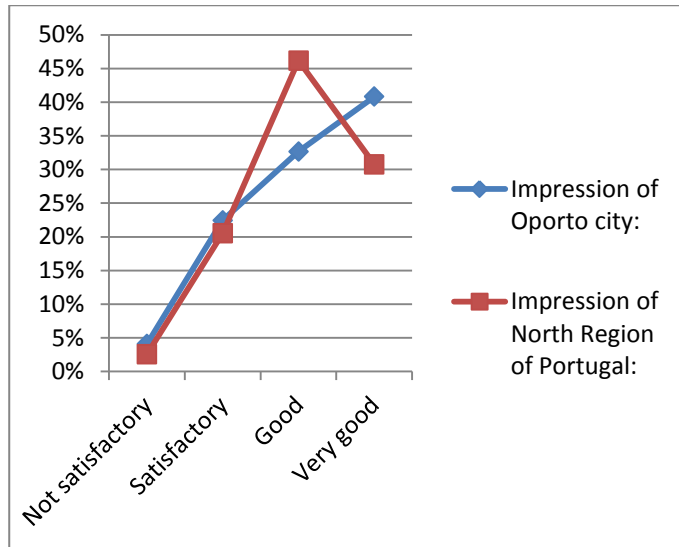
2. Y – Prospects for future visits



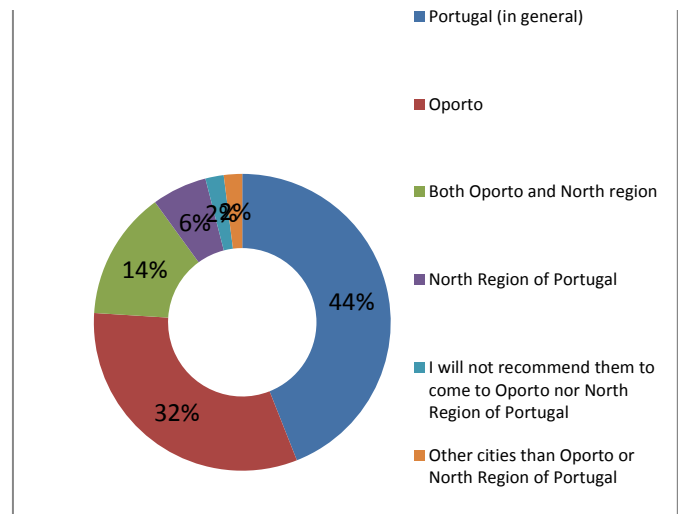
2.Z – Satisfaction level with the visit to Oporto and/ or N.P.



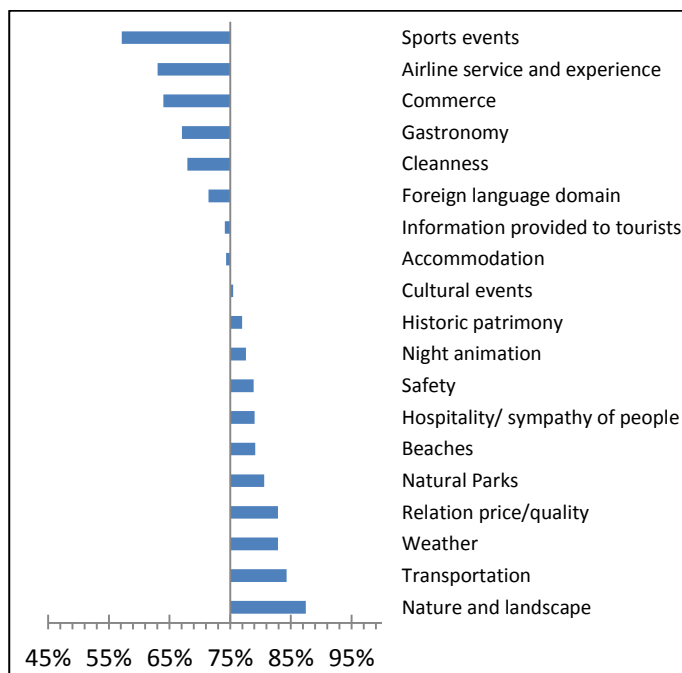
2.AA – Tourists impression of Oporto and N.R.



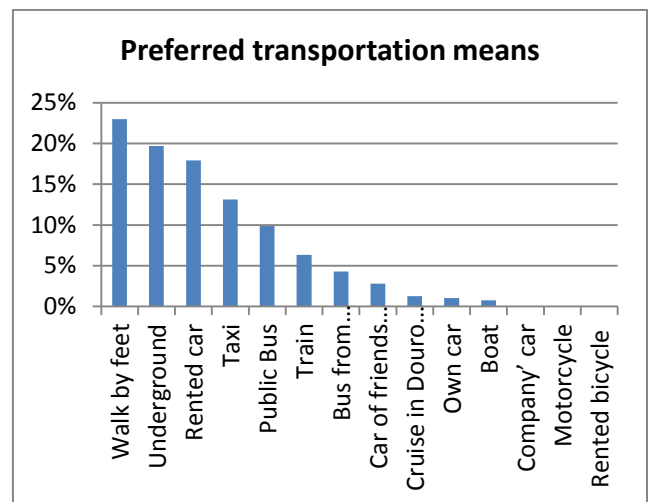
2.AD – Intention to recommend visit to Oporto and/or N.P. to friend and relatives



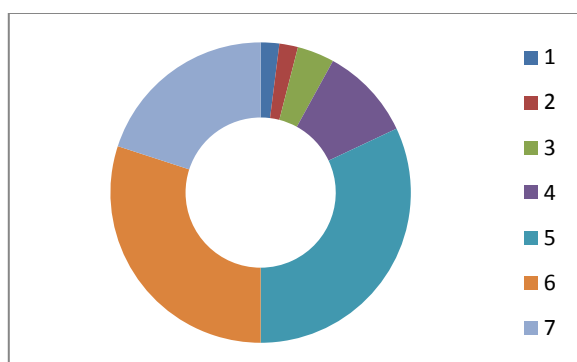
2.AB – Satisfaction level of each dimension



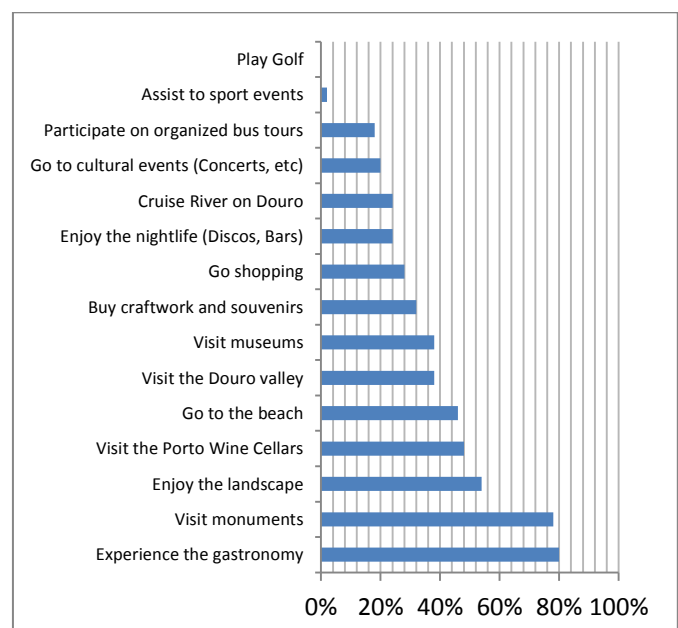
2.AE – Preferred transportation means by tourists



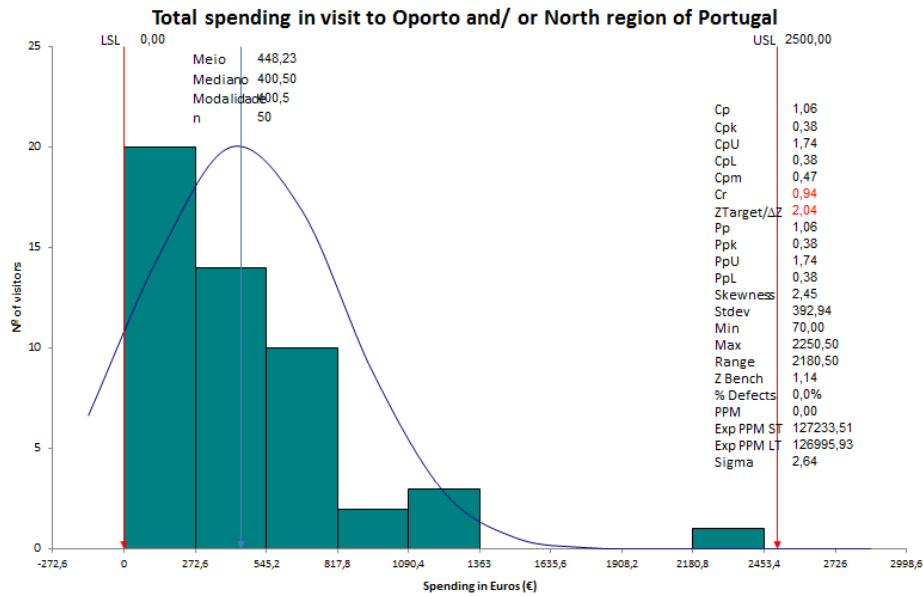
2.AC – Intention to recommend a visit to Oporto and/or N.P. to friend and relatives in a scale of 1 to 7



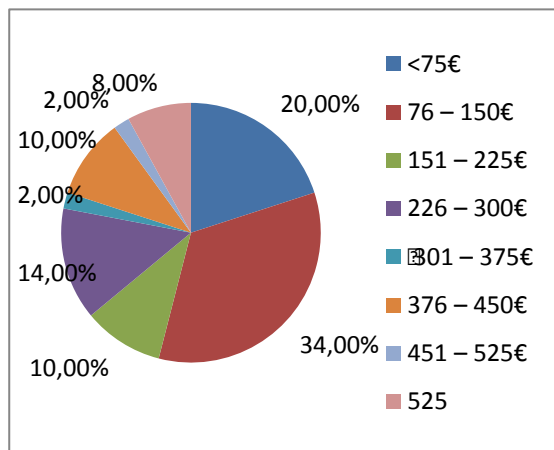
2.AF – Leisure activities during visit



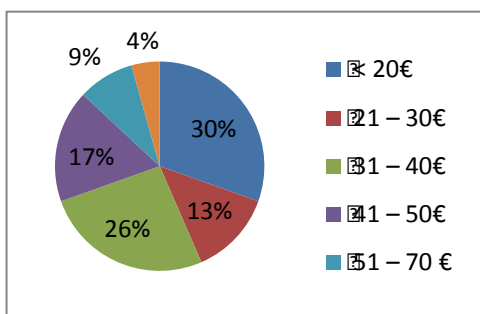
2.AG – Total spending in visit Oporto and/or N.P.



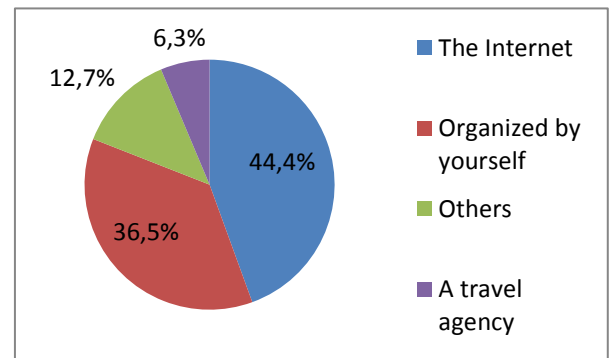
2.AH – Approximated total spending in transportation per person (includes ticket' flights and transportation used during your stay)



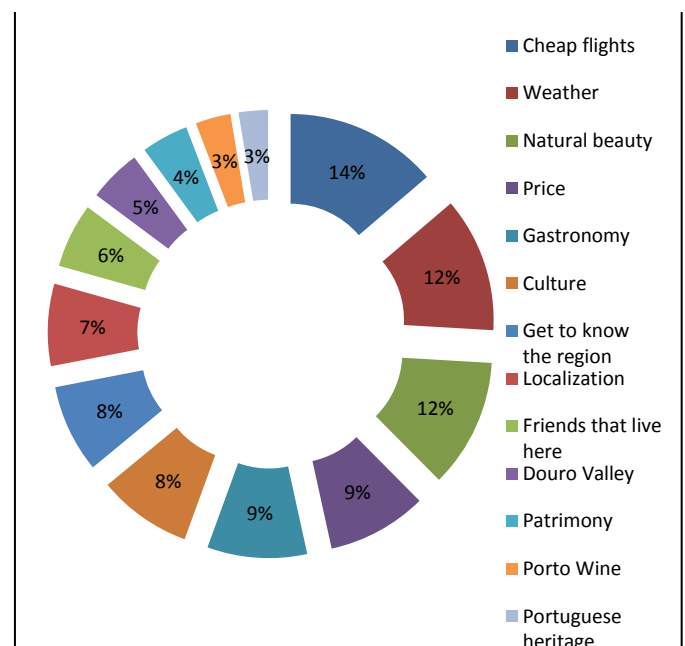
2.AI - Average spend per night accommodation and person



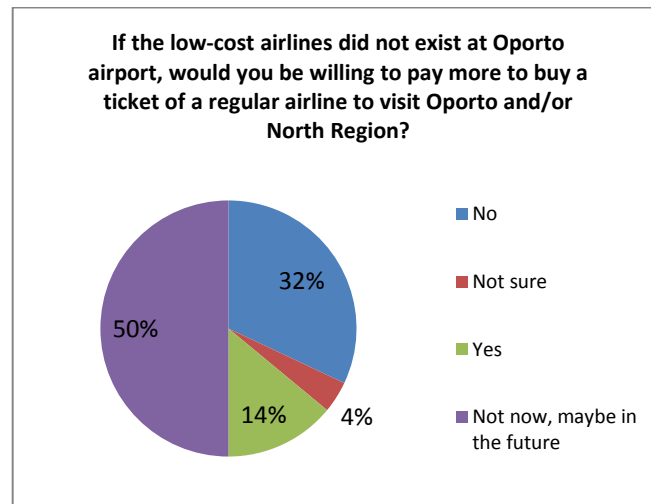
2.AJ – How tourists organized the visit to the region



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



2.AL - Intention to travel with a FSC to Oporto airport if LCC did not existed



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”

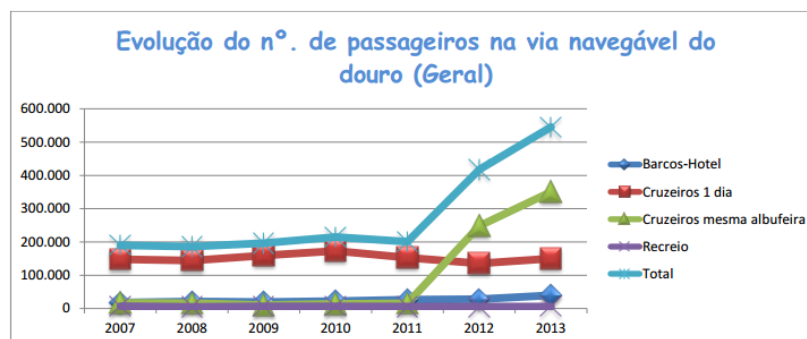
III – TURISMO	7. Valorizar Recursos Paisagísticos e Patrimoniais	A) Valorização Patrimonial	32. Recriação Momentos Históricos
			33. Dinamização Novos Percursos Temáticos
			34. Revitalização Festas Tradicionais
		B) Valorização Paisagem	35. Requalificação Miradouros
	8. Melhorar a Promoção e Acolhimento	A) Promoção e Acolhimento	36. Percorso Muralha Fernandina e Sta Clara
			37. TIC
			38. Welcome Centre
			39. Agentes “I can help”
	9. Incentivar Criação Novos Atractivos	A) Revitalização dos Existentes e Criação de Novos Esp. Museológicos	40. Qualificação Restauração
			41. Qualificação Circuitos Turísticos
			42. Sinalética de Orientação e Interpretação
		B) Criação Infra-Estruturas e Serviços Turísticos	43. Revitaliz. dos Existentes e Criação de Novos Espaços Museológicos
			44. Revitaliz. Mercado Ferreira Borges
			45. Reforço Oferta Hoteleira

Source: C.M.P.. (2010). Plano de Gestão: centro histórico do Porto Património Mundial.

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



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)¹.

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 ².

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 award³. 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.

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. “

Source: ANA Routlab. (2013). *Programme initiative.pt 2.0*. Available: <http://routelab.ana.pt/en-US/Airports/Porto/TourismSupport/Pages/default.aspx>. Last accessed 8th Dec 2014.

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

PORTO & NORTH															
		CITY BREAKS	HIG	HIG	MED	HIG	MED	-	-	MED	-	-	-	-	-
		TOURING	HIG	MED	HIG	HIG	LOW	LOW	-	MED	LOW	-	LOW	-	-
		BUSINESS	HIG	HIG	MED	LOW	-	-	-	LOW	-	-	-	-	-
		NATURE	LOW	MED	HIG	LOW	HIG	-	-	-	-	-	-	-	-

Source: ANA Routlab. (2013). *Programme initiative.pt 2.0*. Available: <http://routelab.ana.pt/en-US/Airports/Porto/TourismSupport/Pages/default.aspx>. Last accessed 8th Dec 2014.