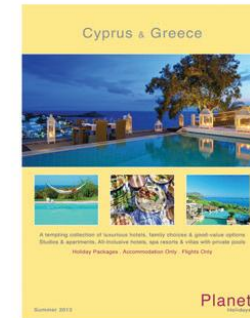
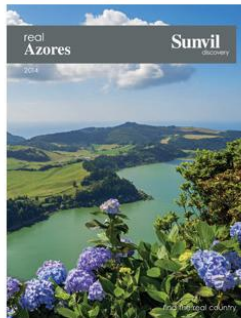
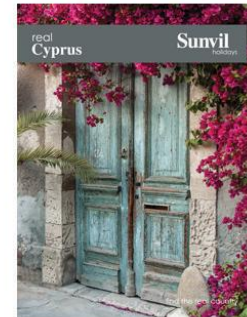
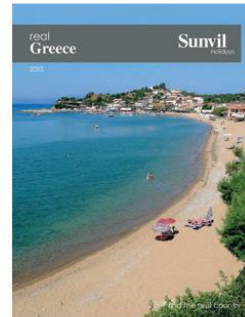




XXXIX Congresso Nacional apavt
Ilha Terceira-
5 a 9 de Dezembro de 2013

Noel Josephides
Chairman

Sunvil Programmes



Sunvil Discovery – Real Azores 2014



www.sunvil.co.uk/azores

Sunvil Profile

- Established 1970
- 2013 Total Turnover: £27.5 Million
- 2013 Total passengers carried 28,324
- Total UK staff – 55
- Seasonal overseas staff - 30

Sunvil's Philosophy

We always use local suppliers so revenue stays in the local economy.

- Local airline
- Local agent
- Local representatives
- Local car hire company
- Locally owned and managed accommodation on bed and breakfast

Our 24 Year History in the Azores

YEAR	TOTAL PAX	TURNOVER	MARGIN
1989-1993 - No statistics available – manual systems			
1993-2004 (11 years)	2283	£2,118,323	
2005 (direct flight begins)	1543	£1,273,417	
2006	1860	£1,461,461	
2007 (two direct flights)	1586	£1,362,624	
2008	1334	£1,112,195	15.76%
2009	1685	£1,087,116	13.63%
2010	1511	£1,016,287	9.11%
2011	1229	£924,985	13.75%
2012	1264	£1,014,833	8.37%
2013	1305	£1,078,376	6.62%
2013			Greece 12.11%

2013 Islands Visited:

The figures below show the number of Sunvil clients visiting each Azorean island.

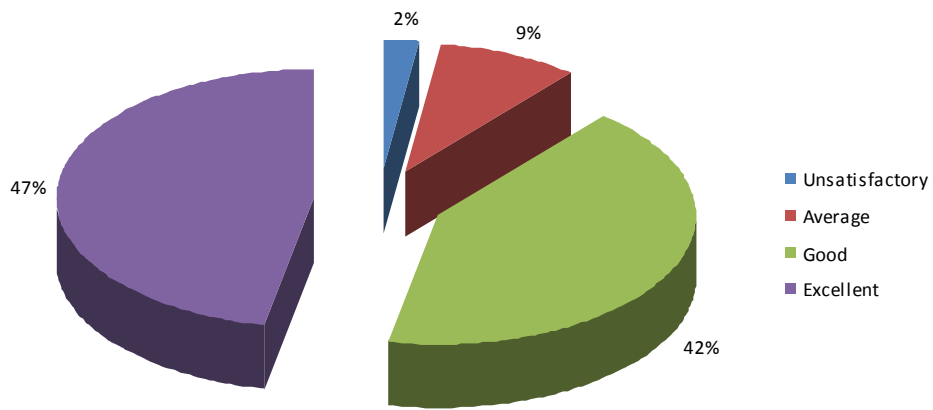
- **Sao Miguel:** 1 180 adults, 19 children and 3 infants
- **Faial:** 130 adults and 4 children
- **Terceira:** 70 adults and 2 children
- **Pico:** 40 adults and 1 child
- **Sao Jorge:** 32 adults
- **Flores:** 27 adults
- **Santa Maria:** 4 adults
- **Graciosa:** 4 adults
- **Corvo:** 2 adults

2013 Azores Analysis

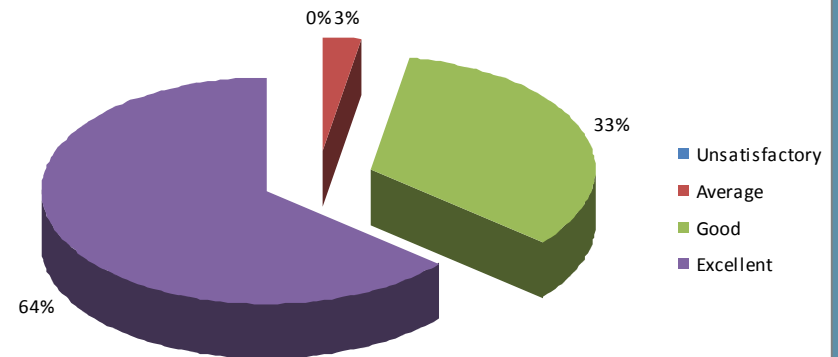
Total Bed Nights	5098
Number of Cars Pre-booked	217
Activities Pre-Booked (e.g Whale & Dolphin Watching)	415
Walking Pre-Booked	49
Pre-Booked Island Tours	29
Average Selling Price (per person)	£826
Average Duration	9.7 days (2008 – 11.6 days)
Direct Bookings (not persons)	453
Agent Bookings (not persons)	165
Aircraft Load Factor	82%
Empty Seats	268

Customer Service

• Sao Miguel

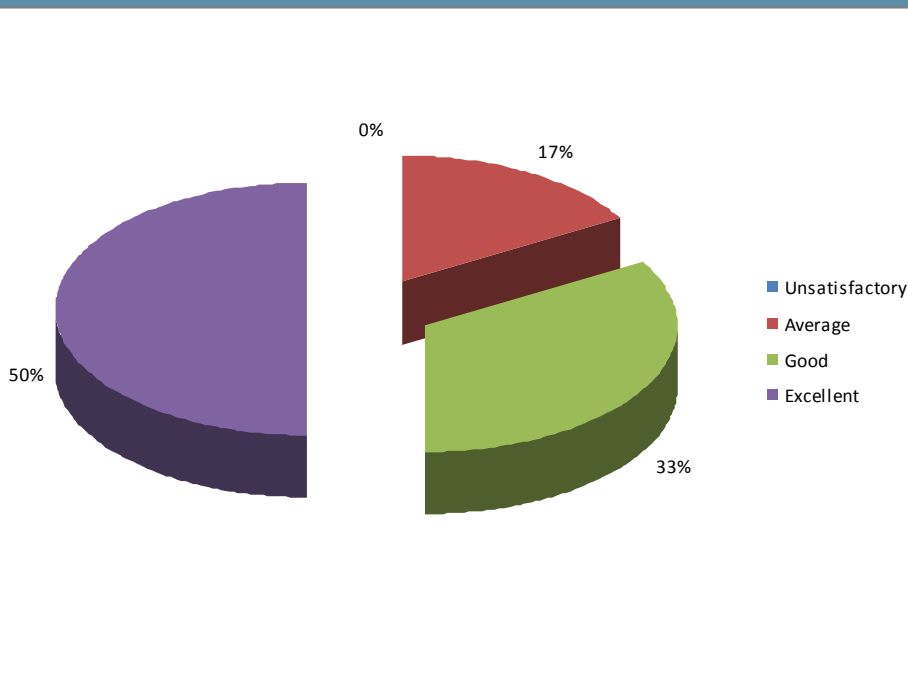


• Faial

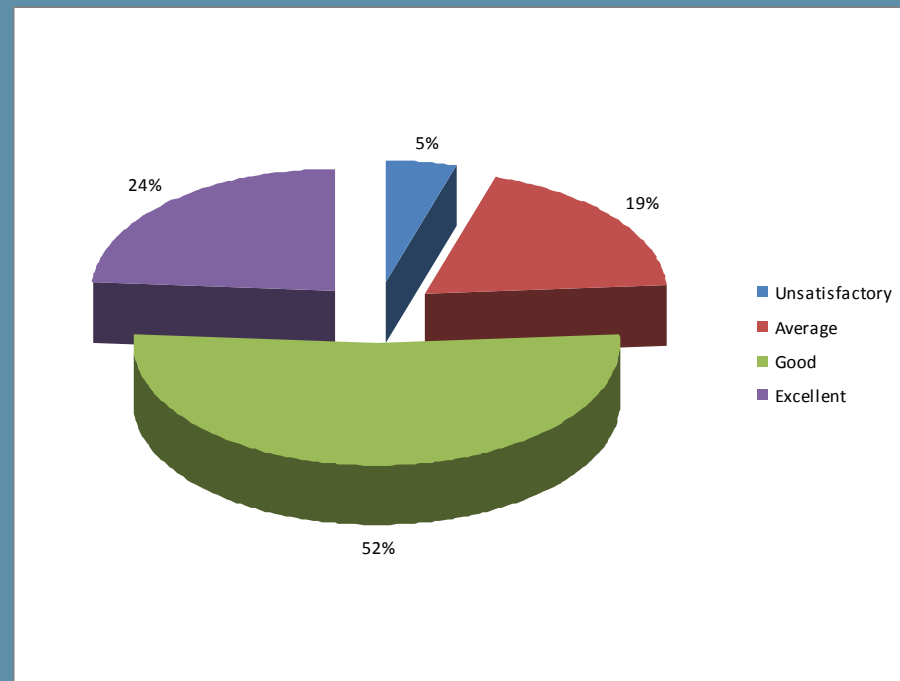


Customer Service

• Pico

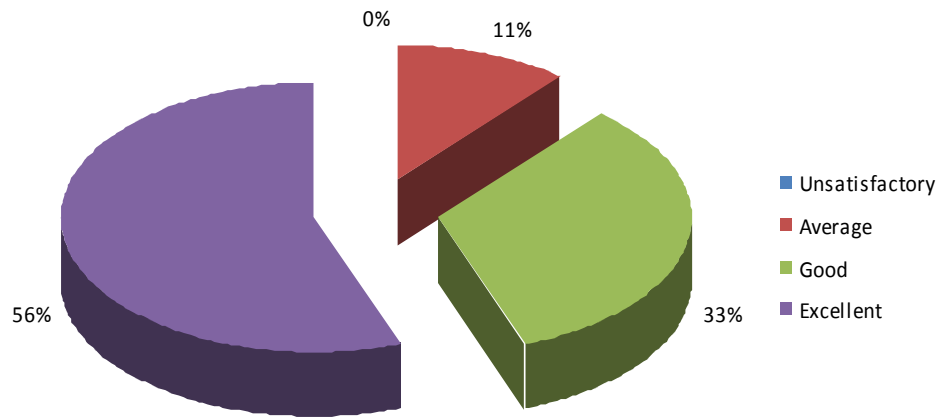


• Terceira

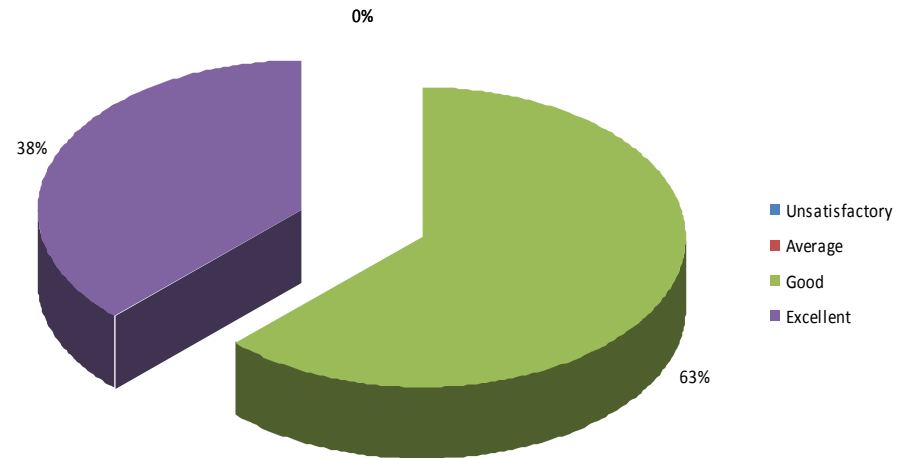


Customer Service

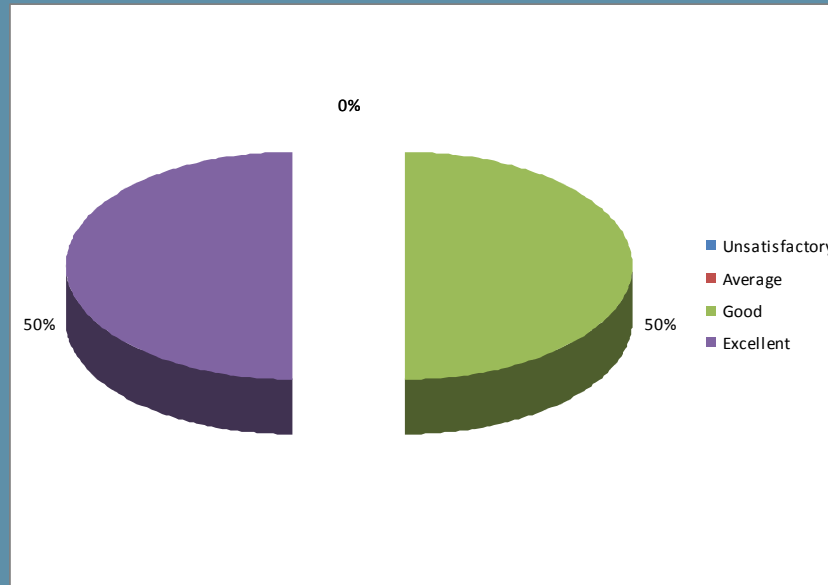
•Sao Jorge



•Flores

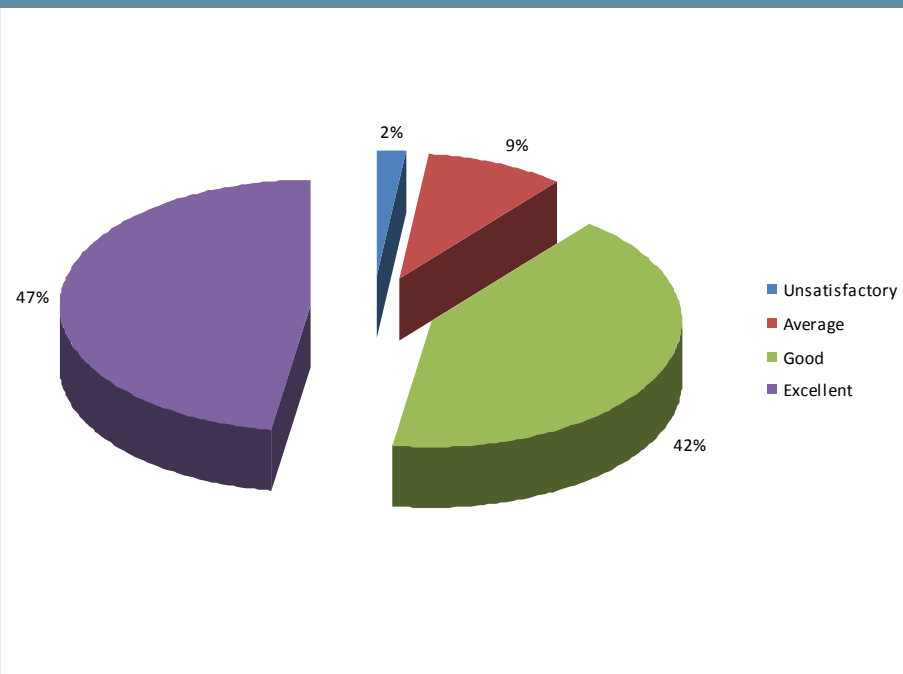


Customer Service Graciosa

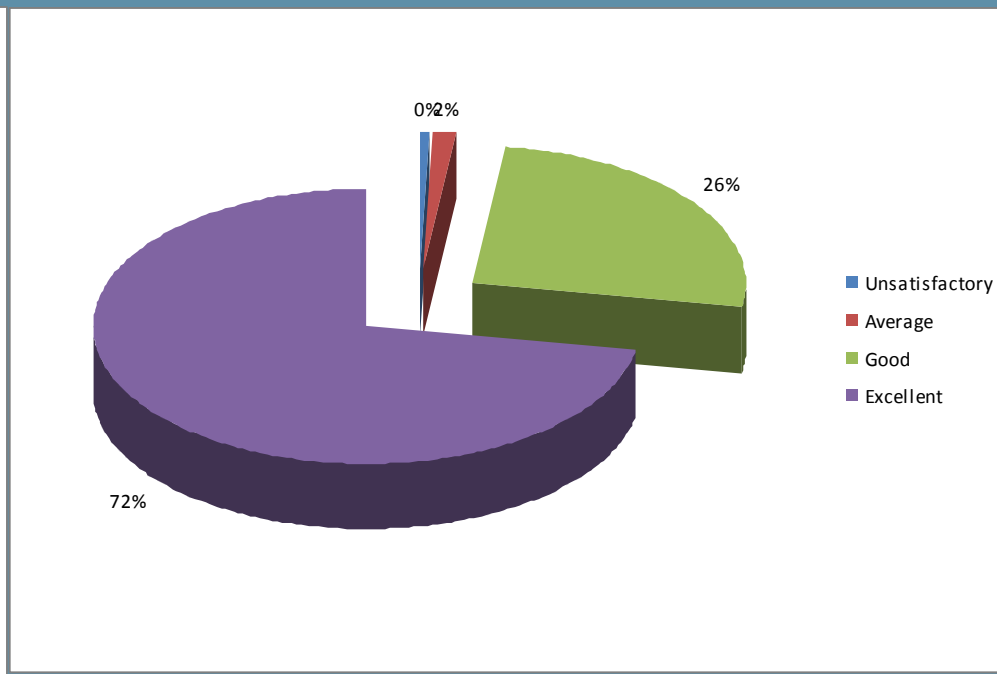


Customer Service

•Azores



•Greece



Why is Sunvil not Growing in the Azores?

- Competition from other operators
- Competition from on-line travel agents
- Competition from bed-banks
- Expense of getting to other islands
- Inconvenience of not being able to get to the other islands on the same day
- No business traffic – poor load factors
- No ethnic or property owners traffic – poor load factors
- Expensive excursions
- No repeat business

Why will the Azores never have mass market appeal from the UK?

- Limited beaches
- Variable weather
- Difficult/Expensive to get to all the islands
- Cold sea
- Limited infrastructure

Winter Tourism from the UK – Is it viable?

NOVEMBER - MARCH

	AVERAGE RAINFALL MM	AVERAGE DAY TIME TEMP. Centigrade
Egypt (Red Sea)	21	24
Brazil (Fortaleza)	129	26
Dubai	93	28
Tenerife	186	20
Madeira	448	18
Tunisia	276	17
Cyprus	389	18
Morocco	160	24
Costa del Sol, Spain	136	16
AZORES	580	15

Telegraph Newspaper Festival of Business

- Willie Walsh – Boss of IAG (British Airways, Iberia, Vueling)
- When asked if low-cost airlines are now over, he replied: “yes, as fuel is much more expensive”

Easyjet Kalamata Prices 2014

Low cost but high price!

April (Saturday)	£180.02	Return
May half-term (Saturday)	£494.03	Return
June (Tuesday)	£220.02	Return
Mid-July (Saturday)	£332.02	Return
26 July (Saturday)	£490.02	Return
12 August (Tuesday)	£311.02	Return
2 September (Tuesday)	£231.02	Return

Where can the Azores Improve?

- Faster responses from hoteliers
- More imaginative marketing from hoteliers
- Negative effect of peak season stop sales
- Welcome Smile – Warmth – Training
- Right personality for the job