

NOW/HERE



Destination Nordics takes us towards all of our three main strategic objectives:

1. Target 20 million passengers by 2030 focusing on Asian traffic

2. Deliver unique Nordic experience

3. Explore new business opportunities within the intelligent travel ecosystem

✓ Increasing traffic from Asia to Nordics by stimulating new type of demand

✓ Creating a next level unique holiday CX throughout the customer journey

✓ Expanding our role into a new, digitally enabled business space

How are Nordic experiences sold currently?

- Tour operator business based
- Winter focused (Dec-Jan). And the winter is fully booked!
- A few professional digital & online inventories and booking platforms, but with restricted coverage of market
- The FIT challenge – where to find information, where to buy?
- Micro players market
- Professional local DMCs missing with Finland/Nordic level products
- Underdeveloped product concepts
- Common Arctic/Nordic potential – but no real co-operation yet



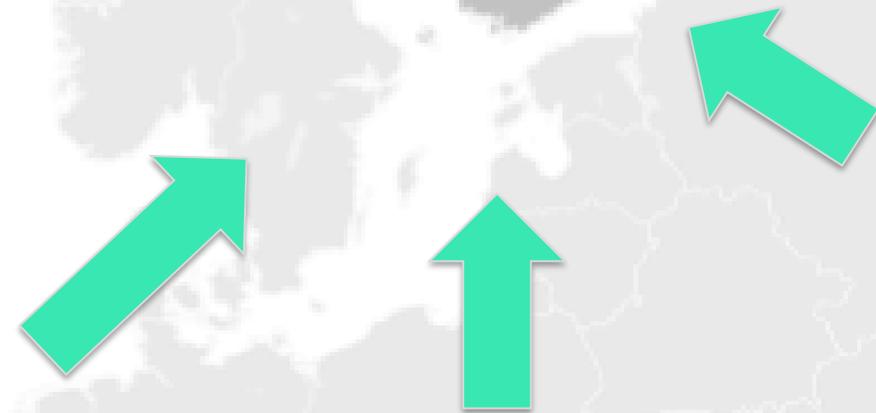
Finnair wants to contribute strongly to growing the Nordic travel industry

From merely transporting travelers between Asia and Europe to ***actively selling the Nordics as a destination where visitors can enjoy truly unique experiences.***

From inbound tourism being a “nice to have” to ***a great opportunity.***

From “difficult to sell” to ***an inspirational world-class Nordic marketplace.***

From traditional, tour operator based group travel to ***fully digitalized and tailorable Nordic experiences.***

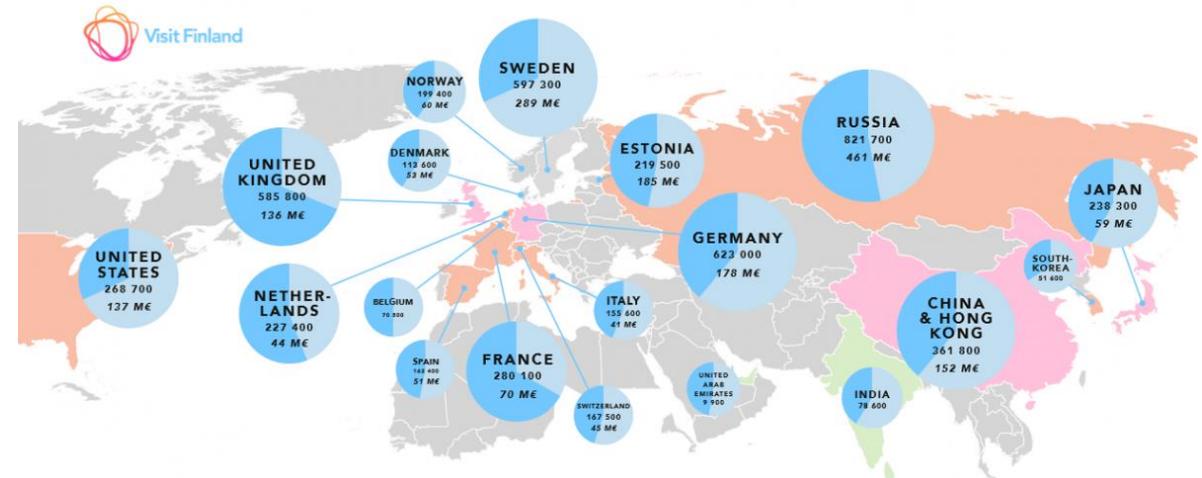
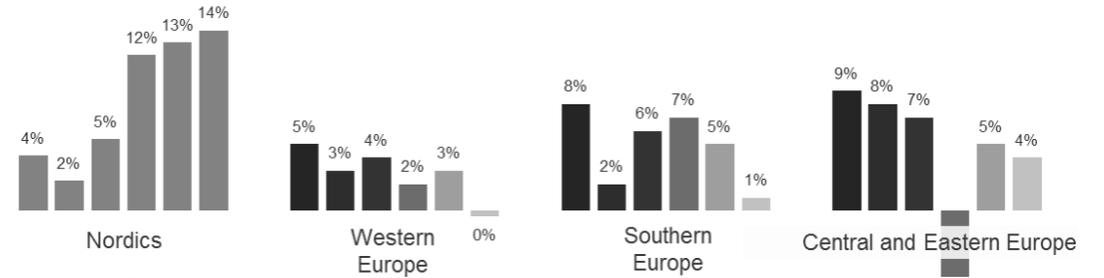


The global trends in tourism are changing rapidly, and this presents us a unique opportunity



- ➔ Independent travel (FITs) gaining share from group travel
- ➔ Online bookings gaining share from offline bookings
- ➔ Strong growth in Asian outbound tourism
- ➔ Experiences gaining share from material possessions
- ➔ Authenticity gaining share from mass tourism

Change in foreign tourist arrivals to different European regions, 2010 - 2016



VISIT FINLAND'S TARGET MARKETS AND OTHER TOP SOURCE MARKETS

Number of Overnights and Tourism Revenue in Finland 2017

- OVERNIGHTS 2017 SUMMER SEASON
- OVERNIGHTS 2017 WINTER SEASON
- FOCUS MARKETS
- STABLE GROWTH MARKETS
- FAST GROWING & NEW MARKETS

Foreign overnights 6.7 million.
 Tourism Export Earnings EUR 4.0 billion (2017 est.).
 Domestic overnights 15.2 million.
 Domestic tourism income EUR 10.2 billion (2016).

Source: Statistics Finland - Visit Finland, Statistics Service Rudolf

GENERATION Z

ARE OPEN-MINDED, BUCKET-LIST ORIENTED & LOOKING FOR OFF THE BEATEN PATH LOCATIONS



Travel Days Per Year

TOP VACATIONS TYPES



56%
Visiting Family



51%
Relaxing



45%
Sight-seeing



36%
Special Event



81% Said budget is a factor



25% Of their budget is allocated to flights

90%

Decisions are influenced by social media

RESOURCES USED IN BOOKING LAST TRIP



1. Search Engine
2. OTA
3. Airline Site
4. Hotel Site

TRAVEL PERSONALITY

I look for the best deals



I'll go anywhere that allows me to explore the outdoors and be active



YOLO: Crossing off my bucket list is imperative



I opt for off the beaten path locations and recommendations from locals



MOST INFLUENTIAL PLATFORMS



Snapchat



Instagram



Facebook

Expedia
MediaSolutions

Download the study: bit.ly/american-travel

CONCEPT

MANIFESTO

NOW / *HERE*

You should be here. In the middle of nowhere. Having the feeling of time stopping and the rest of the world disappearing. Watching the flames or city lights, hiking a fjord or dipping into a frozen lake. Feeling balanced, happy and a little mad under the midnight sun or polar night.

Nordic happiness is an experience of being one – with nature, with others, with time. It is made of silence, peace and purity, a perfect combo of weirdness and wellbeing. It's about getting lost and finding yourself. Being right here right now.

And isn't it miraculous, that happiness can be bought? A few clicks, a mark on calendar and there you go. First nowhere, then *now here*.



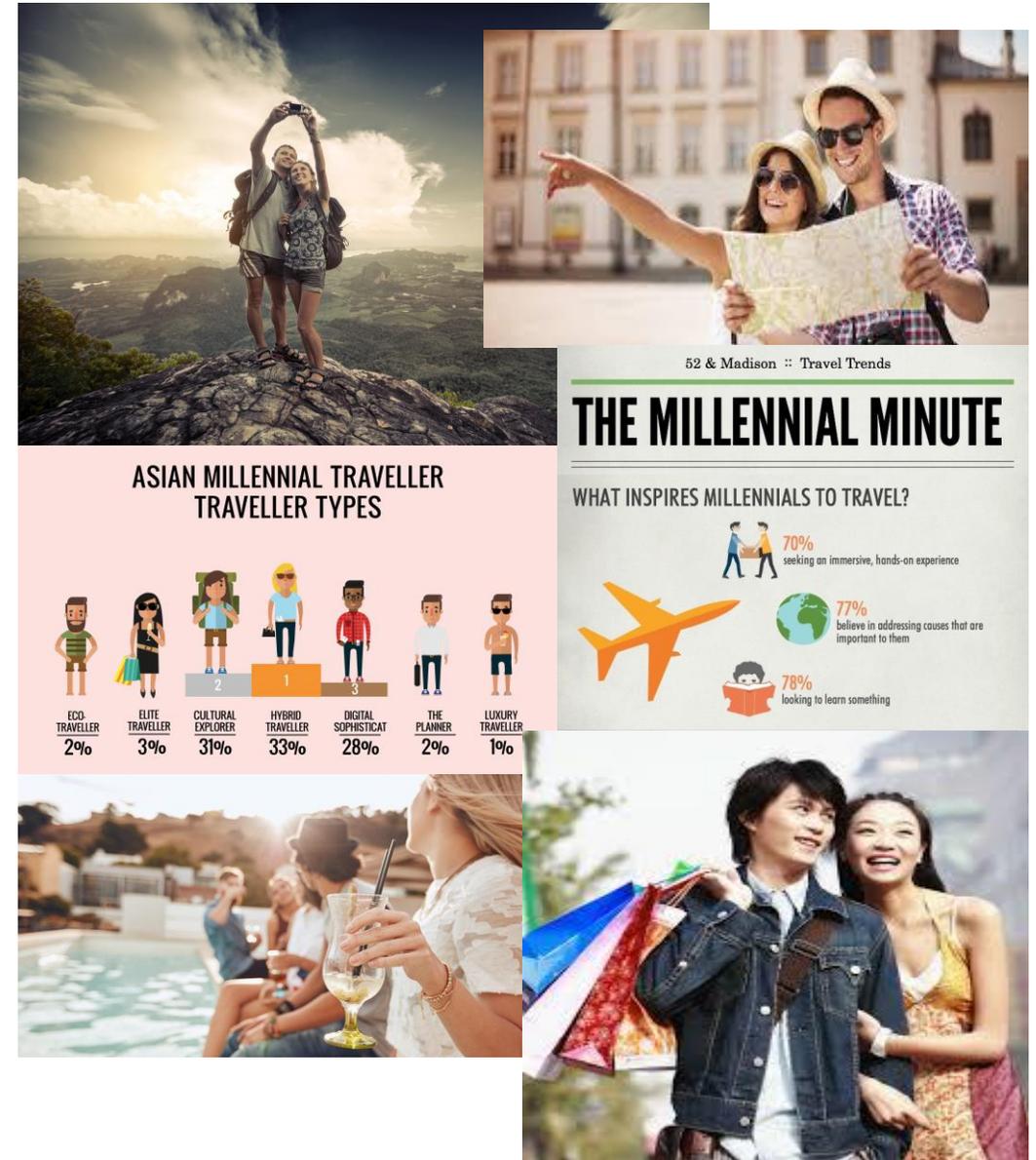
Our target group: The aspirationals

- **A YOUNG AND DIGITAL AUDIENCE + MILLENNIALS**
 - Aspirationals are typically younger and highly digital customers.
 - As consumers, they value ethical choices and authenticity.
 - They are often pioneers in technology, culture, dining.
 - New experiences are important to them as a sources of inspiration and self-growth.
- **EASE AND AUTHENTICITY**
 - Price is always important, but not the only choice driver when selecting an airline.
 - Aspirationals are likely to choose brands with an individual voice.
 - They are inspirational buyers in the area of approved brands and services and spontaneous decision-makers who appreciate ease.
- **PERSONAL SERVICE AND USABILITY**
 - Aspirationals are often digital natives who are accustomed to using digital services, such as mobile check-in, wi-fi, etc.
 - They also have high expectations for service usability.
 - They appreciate service that is genuinely personal and friendly.

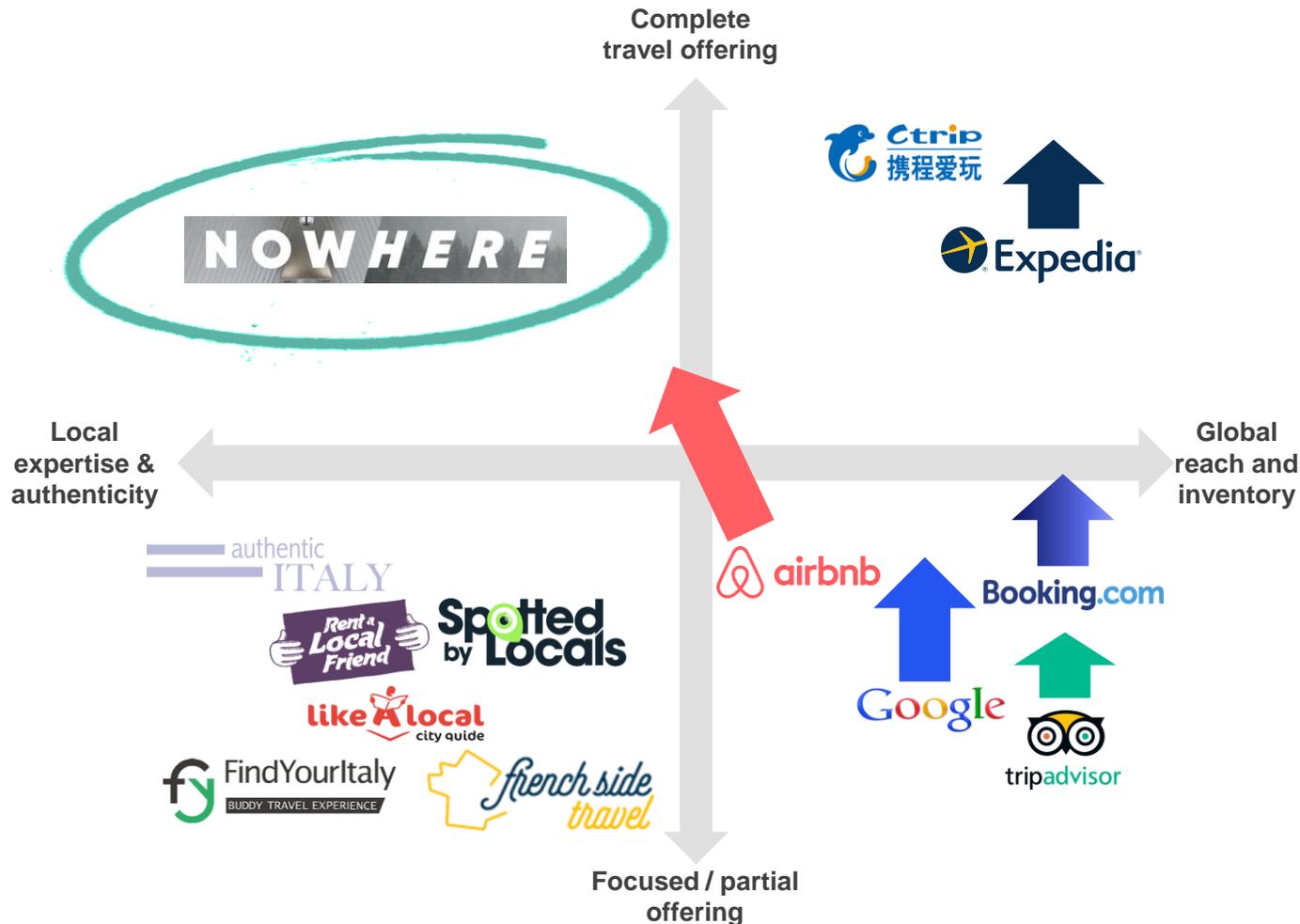


Catering for the millennials, Catering for aspirationalals

- ✓ They want to find unique, out of the beaten path activities and destinations themselves.
- ✓ They long for authentic grassroots experiences – something tour operators can't provide.
- ✓But at the same time they demand effortless, digitalized booking paths, fluid personal service and easy inspiration.
- ✓ They value experience over material possessions – 55% of them will rather travel than spend buying own house
- ✓ They will cover over 50% of the travelling tribe by 2025
- ✓ They will revolutionize traveling – for good
- ✓ There are 1,8 billion of them currently - in China they took 82 million trips in year 2016



We see an opening for an authentic local expert in between the global giants and the small scale locals

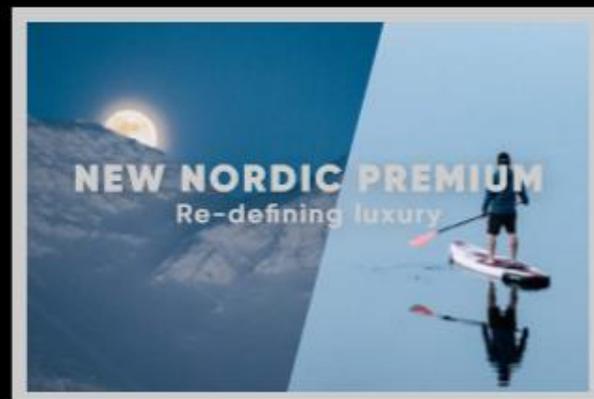


Our To do list:

- ✓ Digitalizing supply, demand and the customer experience
- ✓ Offering a complete, customizable holiday experience
- ✓ Co-creating the most meaningful Nordic holidays with the industry and the customers to develop with high standards/own standardization model
- ✓ Becoming most Local & Authentic
- ✓ Creating a meaningful & trusted Nordic brand for incoming tourism business
- ✓ Developing the business in agile way – try, go, fail, change.

NOWHERE

PRODUCT CATEGORIES





How do we plan to make this happen?

Now/here is going to bring supply and demand together.

First, we need to get totally digitalized and automated. Launch a **platform** that makes it easy and inspirational to find ethical, hand-picked destinations.

Secondly, we want all the interesting **service providers** of the North work with us, **co-create and build** together a truly unique online concept store of authentic experiences.

And we must package it all in a fresh way: **build a brand with an individual voice** that our aspirational consumer feel drawn to.

We want to **create a new business** for us, right on the empty plot between individual adventurers and package tours. And we will inspire, develop and thus create new business and income models for the service providers.



What are we looking for from Suppliers?

Commercial agreement needs to be in place.

Availabilities at least 18 months ahead

Products with minimum 2 participants

Now/here will source in **net rates**. This makes financial transactions simpler.

Visit Finland is preparing **a sustainability certification**. All suppliers need to be in the process of becoming certified or at least willing to do that.

Now/here is focusing on **millennials** as our target customer group. We expect our suppliers to have similar intentions.

The products offered should be **small-scale, genuine, conceptualized and available yearround**.



↑
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Real-time bi-directional information

NOWHERE

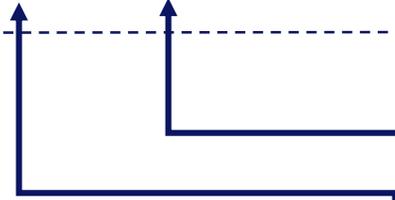
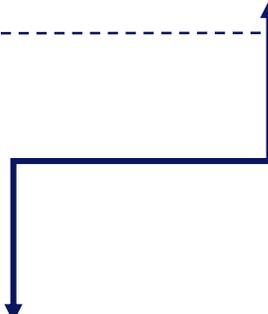
x Finnair

Finnair

Supplier

Accommodations

Activities



NOWHERE

Process Flow - Activities

