

Visit Finland







Teemu Ahola Account Manager, Asia Visit Finland

Agenda

- Opening words
- Visit Finland 2020 activities in India and UAE | Teemu Ahola, Account Manager, Asia, Visit Finland
- Statistical outlook | Sini Markoff, Analyst, Visit Finland
- India market update | Sara Sodhi, Country Manager, Visit Finland, India
- India guest speaker | Suzanne Pereira, Sr. Vice President, Trade Relationships Communications & Service Quality, Thomas Cook (India) Ltd.
- UAE market update | Nour Aridi, Market Representative, Visit Finland, UAE
- UAE guest speaker | Emily Jenkins, Head of Retail & Product Leisure, Dnata Travel Leisure
- Q&A

Market update topics

- Current Situation of COVID -19 outbreak in the market
- Impact of the outbreak to the Travel Trade
- Trends and opportunities

Opening words - Travel recovery

- Visit Finland Travel recovery task force established May 2020
- Task force works to prepare Finnish travel recovery strategy
 - Information gathering and sharing
 - Market readiness and recovery scenarios
 - Coordination of market specific action plans
 - Daily meetings within task force, double weekly meetings with Visit Finland management team and regular meetings with steering group.
 - Streering group consists of representatives from Finnair, Eckerö Line, Scandic Hotels, Sokos Hotels, Helsinki Marketing, Visit Rovaniemi, Visit Tampere, Ruka-Kuusamo and Ministry of Economic Affairs and Employment
- Travel recovery website for Finnish travel trade: <u>Matkailun elpyminen</u>
 - Latest market updates, linkage to official authorities websites, other relevant links
- Travel recovery website for international travel trade: <u>Travel recovery information</u>
 - Accessibility, health and safety instructions, partner and regional information, linkage to official authorities websites



Visit Finland 2020 activities in India and UAE

- Summer sales promotion activities halted in both markets
 - Review of the plans for autumn activities in late august
- Possible actions for autumn consists of joint promotion campaigns, local online sales events and possible PR / influencer FAM
- Limited PR presence in both markets
- Trade webinars in both markets
- Close dialog with local travel trade partners in both markets
- Dubai Expo moved to October 1st 2021 March 31 2022 (initial launch autumn 2020)
- Global e-learning and meet the buyer online tool project ongoing



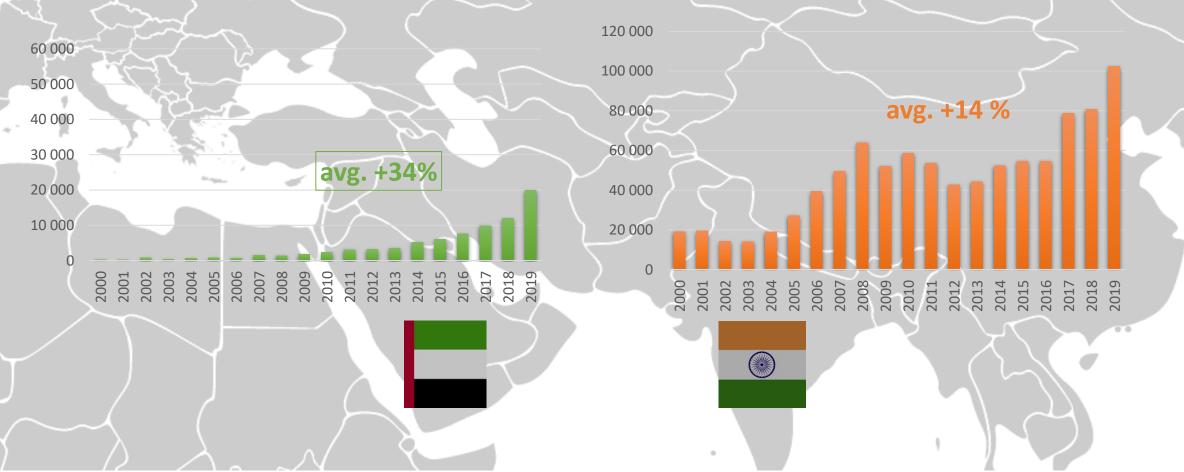




Sini Markoff Analyst Visit Finland



NEW, FAST GROWING TOURISM MARKETS FOR FINLAND: UAE & INDIA

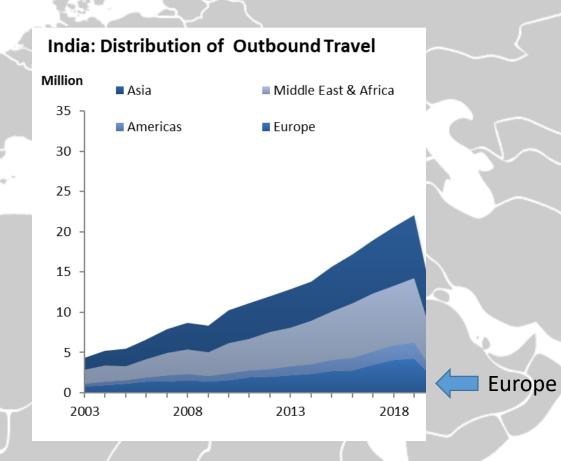








ONE OF THE FASTEST GROWING TOURISM MARKETS WITH HUGE POTENTIAL



- 22 million outbound trips in 2019
- Almost 20% of outbound travel to Europe
- 2/3 of trips for leisure, 1/3 for business
- Fast growing middle class with the possibility to travel
- Most of the frequent travellers come from the biggest cities: New Delhi, Mumbai, Chennai ja Bangalore







Source: Tourism Economics/ Oxford Economics

1. INDIA OUTBOUND TRAVEL TRENDS

TRAVEL HABITS: WEALTHIER CONSUMERS OPT FOR



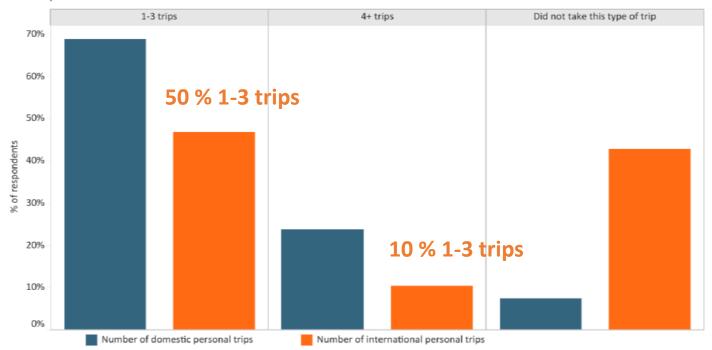
CONSUMER BEHAVIOUR IN INDIA

Leisure: vacations

In the past 12 months how many vacations/holidays did you take?

INTERNATIONAL TRIPS

% of respondents





- Nearly 60% of the respondents did at least one international holiday trip in the past 12 months
- More than 40% did not travel abroad for leisure
- India is predominantly a domesticfocused travel market and is expected to remain so in the coming years. Wealthier consumers are set to increasingly opt for international trips.
- Travelling with the family or with partner/spouse is the most common; also travelling with friends is popular among the younger generations

1. INDIA OUTBOUND TRAVEL TRENDS

CONSUMER BEHAVIOUR AND LEISURE HOLIDAY WISH LIST

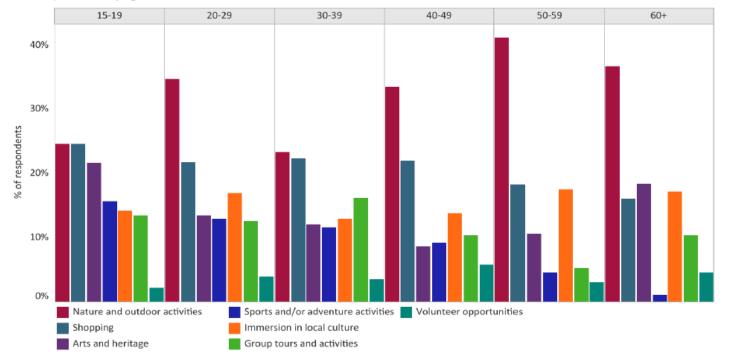


CONSUMER OVERVIEW IN INDIA

Leisure: holiday wish list

What travel destination features are most important when planning future vacations? n=1,001

% of respondents by age



High on holiday wish list:

- Nature and outdoor activities for all age groups
- Shopping and Immersion in local culture are rated also high through generations

Indian travellers are especially looking for:

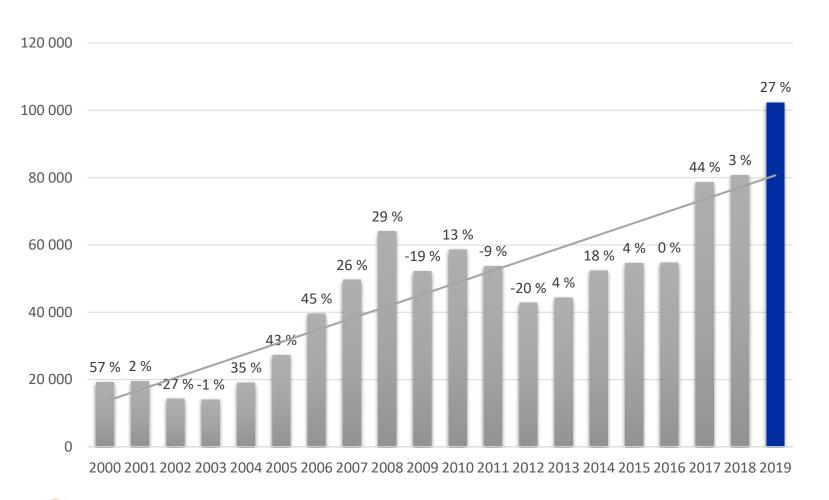
- Safety
- Relaxation
- Family-oriented services



2. INTEREST TOWARDS FINLAND

INDIAN OVERNIGHTS IN FINLAND 2000-2019





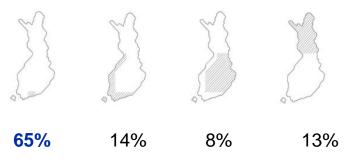
Year 2019

17th in country rankings with a 1% share of foreign overnights

Average change 2000-2019: **+14%**

Change 2019 compared to 2000: +434%

Share of overnights by regions 2019

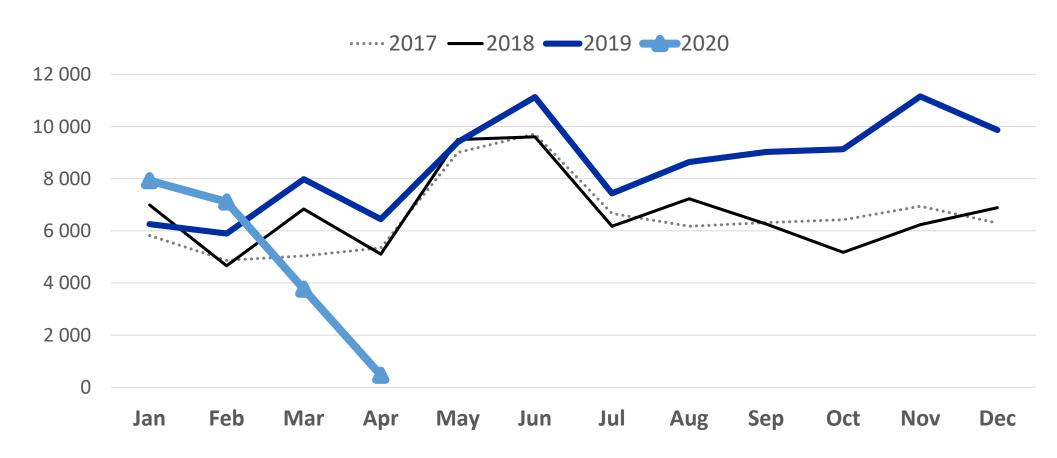




2. INTEREST TOWARDS FINLAND

MONTHLY OVERNIGHTS BY INDIAN VISITORS IN FINLAND 2017-2019 & JAN-APR2020



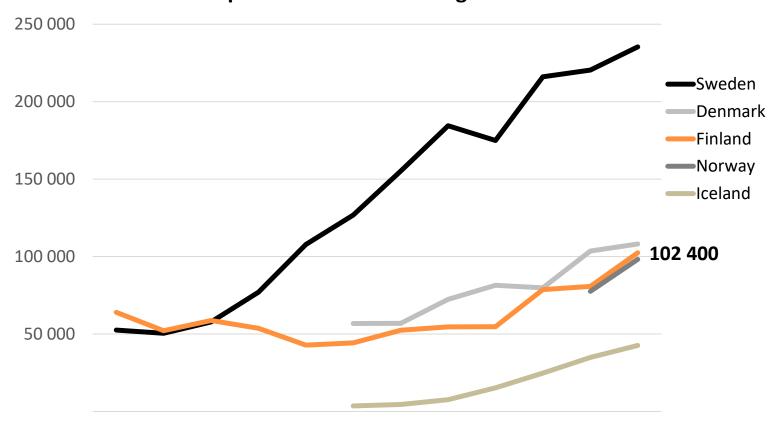




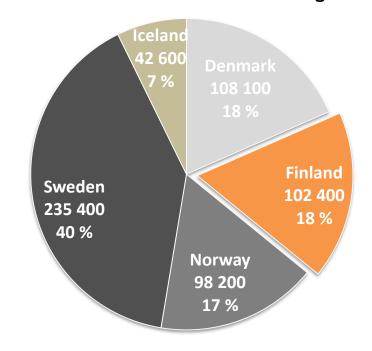
INDIA - YEARLY OVERNIGHTS IN THE NORDIC COUNTRIES



Development of Indian overnights 2008-2019



Nordic countries' share of Indian overnights 2019



2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019



^{*)} Hotels, holiday resorts, camping sites and youth hostels included **) Indian statistics available since 2013 in Denmark and Iceland, and since 2018 in Norway



DEPICTING THE INDIAN HSFIT* MARKET





HIGH OPPORTUNITY MARKET, IN ITS NASCENCY

- Status display conformism to individualism
- Moving away from the destination 'tick-list' and interest in the previously unknown
- Market more daring, captured through social media
- Smaller group sizes
- Very low knowledge about the Nordics overall
- Low understanding of the countries that comprise the region or how they differ















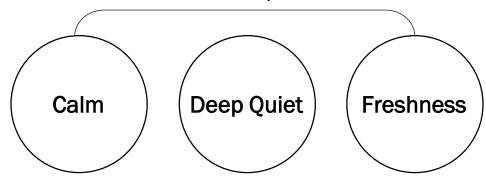


REASONS TO GO: WINTRY DELIGHTS

- Winter related activities
- The Northern Lights
- Fjords
- Closeness to nature
- Famed locations or things to do
- A connection with the past
- Wellbeing



Where there are deeper end benefits



"Stop showing us hiking. We don't hike. We'll admire the beautiful landscapes, but we don't want to know about the really difficult physical tasks."



















BROADER BARRIERS

- The cold
- In-region travel
- Availability of vegetarian cuisine (particularly in rural areas)
- Accommodation and service



SUMMER AN UNTAPPED SEASON

- Not widely associated with non winter seasons
- Yet a particular opportunity vs. the increasingly hot Southern / Central European destinations



TRAVEL RELATED INTERNET SEARCHES 2019 – TOP TARGET MARKETS FOR FINLAND

	Markets	2019	Growth		
•	Japan	556.756	+37,3%		
	Russian Federation	524.545	+15,9%		
	Germany	455.265	+37,9%		
	United States	402.123	+20,4%		
	United Kingdom	353.340	+39,1%		
*:	China	317.465	-16,3%		
	France	248.971	+20,9%		
	Italy	223.324	+21,9%		
***	Spain	205.899	+21,7%		
•	India	157.504	+33,4%		
	Rest of the world	1.694.428	+24,7%		

- India no. 10 in ranking in absolute numbers.
- Growth in the number of searches is one of the fastest ones compared to other target markets.

SEARCHES GLOBALLY

Finland's top brandtags

Top Micro-Brandtags	Growth			
1. Tourism	+2,2%			
2. Northern Lights	+49,1%			
3. Travel	+19,3%			
4. Saunas	+43,3%			
5. Places to Visit	+15,9%			
6. Igloos Ice Hotels	+34,3%			
7. Cities	+17,2%			
8. Santa Claus	+21,2%			
9. Holiday Packages	+33,0%			
10.Hotels	+47,8%			
11.Lakes*	-7,7%			
12.Camping	+41,7%			

*)Please note:

There was a 52% growth in searches for Lakes in 2018 due to Expedia campaign

Source: D2 Digital Demand

VISIT FINLAND

Bloom Consulting



Top touristic activities in Finland remain the same, and this year are the fastest growing...

Northern Lights



#2 447.662 searches +49,1%

Saunas



#4 296.839 searches +43,3%

Igloos Ice Hotels



#6 242.199 searches +34,3%

... experiencing a gain in the total digital demand market share for Finland

Northern Lights



Market share 2019

#2 447.662 searches +49,1%

Market share 2018 7,2%

Saunas



#4 296.839 searches +43,3%

Igloos Ice Hotels



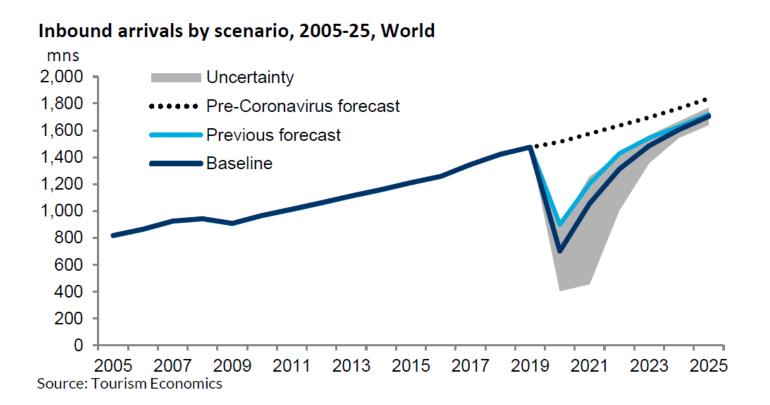
#6 242.199 searches +34.3%

Market share 2018

Market share 2019 → 4,7%



WORLD TRAVEL OUTLOOK AFTER COVID-19



Global arrivals are forecast to decline 52% in 2020, with 2019 levels not being reached again until 2023.

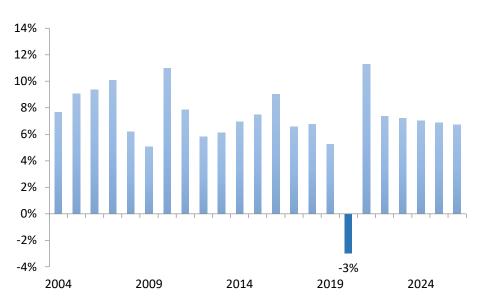
3 drivers of uncertainty:

- 1. Prolonged travel restrictions
- 2. Loss in GDP
- Weakened consumer confidence

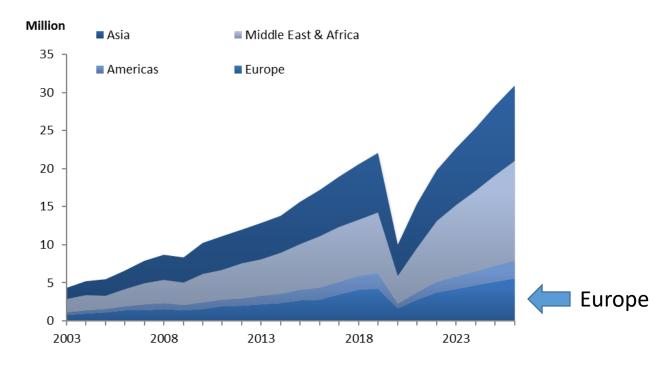
INDIA TRAVEL OUTLOOK AFTER COVID-19

Global GDP is forecast to contract 5% in 2020.





India: Distribution of Outbound Travel



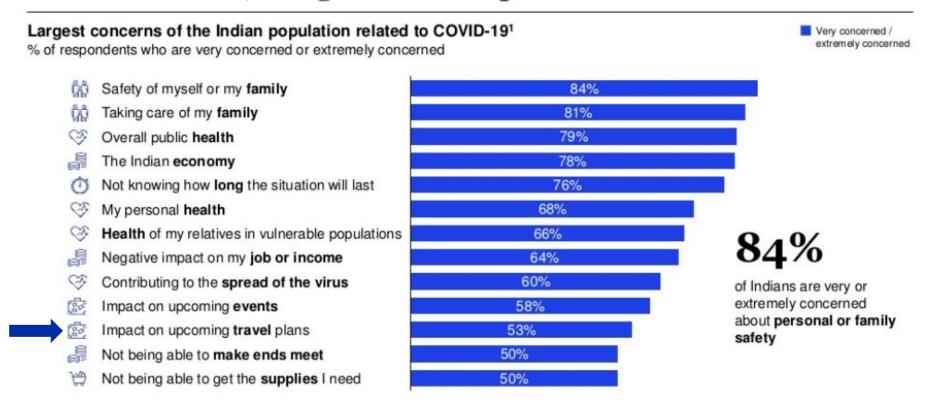
Source: Global Highlights & Risks, June 2020 Tourism Economics/ Oxfrord Economics

INDIA: THE LARGEST CONCERNS RELATED TO COVID-19





Personal and family health and safety remain substantial concerns for most Indians, along with overall public health



1 Q: What concerns you most about the COVID-19 situation? Possible answers: "not a concern", "minimally concerned"; "somewhat concerned"; "very concerned"; "extremely concerned."

Source: McKinsey & Company COVID-19 India Consumer Pulse Survey 5/22-5/25/2020, n = 614, sampled to match India's general population 18+ years

McKinsey & Company

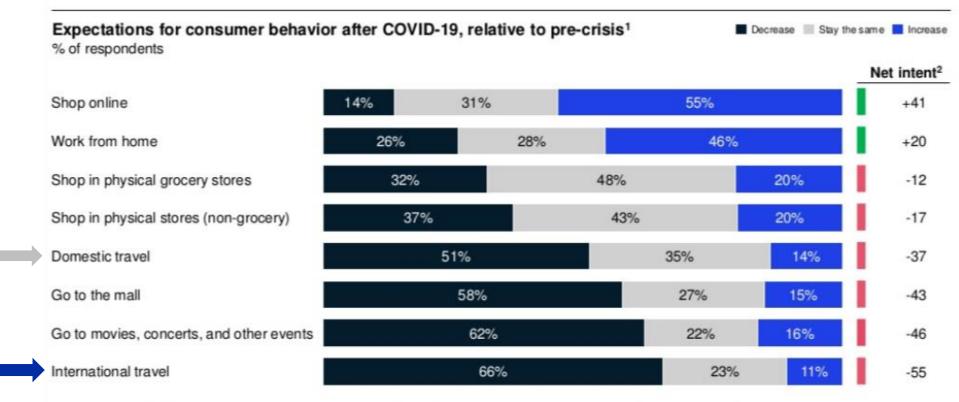
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3. AFTER COVID-19: FUTURE OUTLOOK

INDIA: EXPECTATIONS FOR CONSUMER BEHAVIOR AFTER COVID-19

Looking beyond COVID-19, Indians expect to reduce in-person activities such as traveling, attending events, and going to the mall



¹ Q. Once the coronavirus (COVID-19) situation has subsided, which of the following do you think you will do more or less compared to before the coronavirus (COVID-19) situation started? Possible answers: "will reduce this"; "will do the same as before coronavirus": "will increase this."

Source: McKinsey & Company COVID-19 India Consumer Pulse Survey 5/22-5/25/2020, n = 614, sampled to match India's general population 18+ years

McKinsey & Company

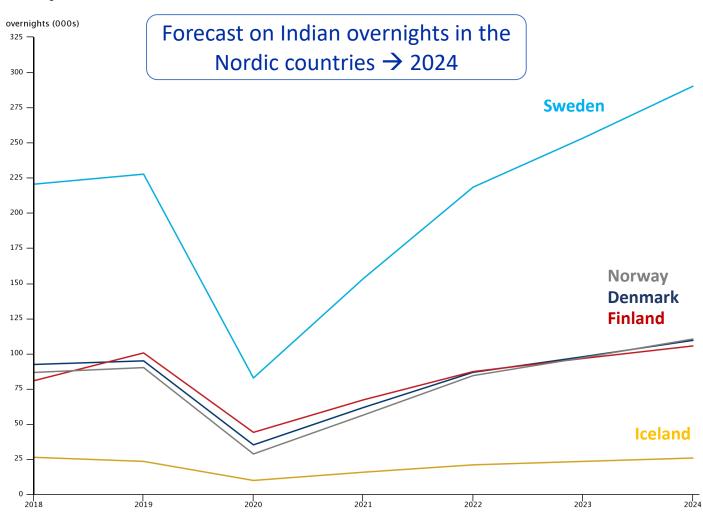
^{*}Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating to increase time spent.

3. AFTER COVID-19: FUTURE OUTLOOK

COVID-19 IMPACT: OUTLOOK ON TRAVEL FROM INDIA TO THE NORDIC COUNTRIES



Selection - 16 June 2020 14:55:56



- According to Oxford Economics, number of Indian overnights in the Nordic countries will drop around 60-70% in 2020
- Sweden continues to hold clearly the number one position in the Nordics, and it seems to gain even more market share in the future
- Finland goes hand in hand with Norway and Denmark in relation of the registered Indian overnights in respective country

Source: Oxford Economics

3. AFTER COVID-19: FUTURE OUTLOOK COVID-19 IMPACT: OUTLOOK ON TRAVEL FROM INDIA TO FINLAND

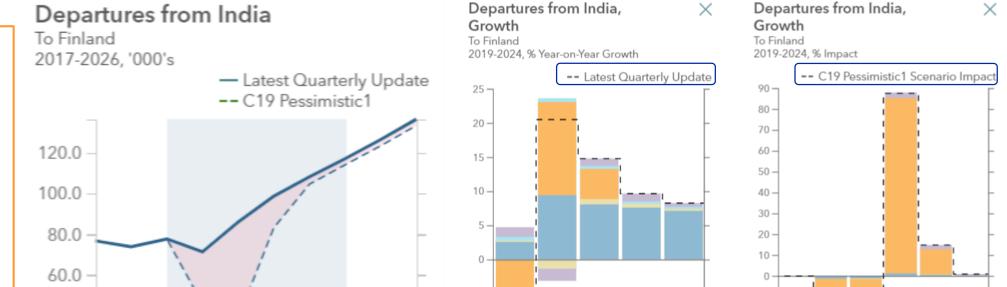
- BASELINE & PESSIMISTIC1

40.0

- According to Euromonitor's baseline scenario, travel from India to Finland would start to recover quite rapidly and the 2019 level could be reached already during 2021
- According to the more pessimistic scenario, the recovery would not start before **2022**, but after that the trips to Finland would increase very quickly and reach the 2019 level the same year

Source: Euromonitor International

VISIT FINLAND



-10 -

'26

Baseline scenario (= blue line, YoY change on the left) / Probability 35-45%

'24

- COVID-19 pandemic peaks in late May/early June.
- The economic upheaval induced by restrictions to contain the coronavirus do not spill over to a large number of bankruptcies, limiting the length and depth of the recession in most countries. Financial crisis is similarly avoided. Therefore, once restrictions are lifted, economies quickly rebound.

'22

-10 -

-20 -

-30 -

-40 -

'24

'22

Global GDP growth of -3.8% to -2.6% in 2020

Pessimistic1 scenario (= dotted line, YoY change on the right) / Probability 25-35%

The pandemic lasts 2 4 quarters

'19

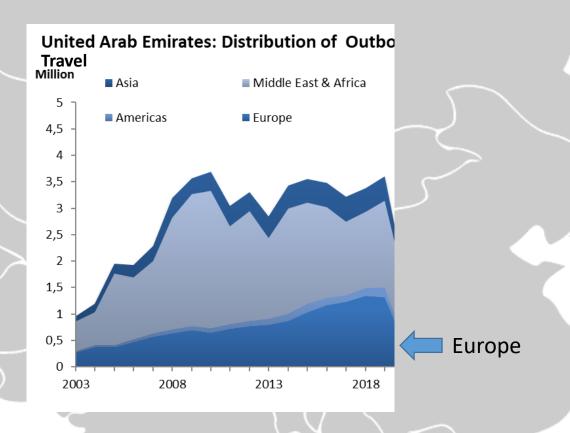
- Global supply chains get disrupted and cashflow mismatches lead to a rise in bankruptcies.
- Global GDP growth of -6.0% to -4.0% in 2020



1/3 OF OUTBOUND TRAVEL TO EUROPE

- 4 million outbound trips, of which 1/3 to Europe
- Fast growth to Europe and Finland in recent years
- Population relatively young
- In addition to Emiratis, a big population of expatriates live in UAE





Source: Oxford Economics

1. UAE OUTBOUND TRAVEL TRENDS

STRUCTURE OF OUTBOUND TRAVEL AND EXPENDITURE

Outbound Departures: Number of Trips 2014-2019

'000 trips						
	2014	2015	2016	2017	2018	2019
Air	3,580.8	3,916.5	4,007.6	4,011.9	3,971.0	4,187.2
Land	141.9	152.7	154.0	143.3	133.7	140.3
Rail	-	-	-	-	-	-
Water	164.5	180.0	200.2	132.5	114.0	118.6
Business	1,074.8	1,175.5	1,208.7	1,186.8	1,158.6	1,218.8
Leisure	2,812.4	3,073.7	3,153.1	3,100.8	3,060.1	3,227.2
Outbound Departures	3,887.1	4,249.2	4,361.8	4,287.7	4,218.7	4,446.0

cource: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company

research, trade interviews, trade sources

Note: Outbound departures is the sum of air, land, rail and water departures or the sum of business and

leisure departures

A ED maillian

4 MILLION TRIPS

- 73% for leisure and 27% for business purposes
- 94% of outbound departures by air

Outbound Expenditure: Value 2014-2019

FINLAND

AED million						/
	2014	2015	2016	2017	2018	2019
Business	5,207.2	6,488.9	6,651.6	6,855.8	6,652.3	6,972.6
Leisure	20,828.8	25,955.4	26,606.6	27,423.2	27,046.0	28,931.9
Lodging	6,098.9	7,535.2	7,658.7	7,891.0	7,767.5	8,283.2
Activities	6,215.8	7,705.1	7,819.6	8,093.3	7,959.6	8,373.0
Food	4,518.4	5,620.9	5,778.0	5,950.8	5,850.0	6,254.6
Shopping	6,509.1	8,089.9	8,274.7	8,508.0	8,606.6	9,112.6
Travel in Destination	2,489.1	3,113.5	3,164.5	3,170.8	3,042.2	3,249.4
Other Outgoing Expenditure	204.8	379.8	562.7	665.0	472.5	631.9
Outbound Expenditure	26,035.9	32,444.3	33,258.2	34,279.0	33,698.4	35,904.8
VISIT						

EXPENDITURE

19

.5

- 25% of total expenditure on shopping
- 23% each on activities and on lodging
- 17% on food

Source: Euromonitor International

1. UAE OUTBOUND TRAVEL TRENDS

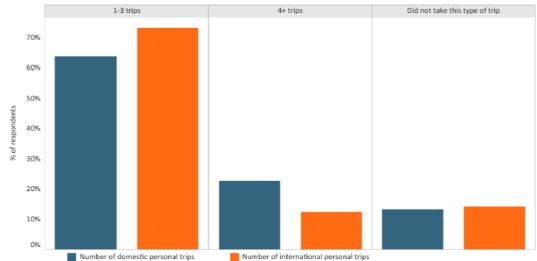
TRAVEL HABITS: FREQUENT INTERNATIONAL TRAVELLERS

- Nearly 90% of the respondents did international holiday trips (during the past 12 months)
- Only 12% did not travel abroad for leisure

Leisure: vacations

In the past 12 months how many vacations/holidays did you take? n= 1.053

% of respondents

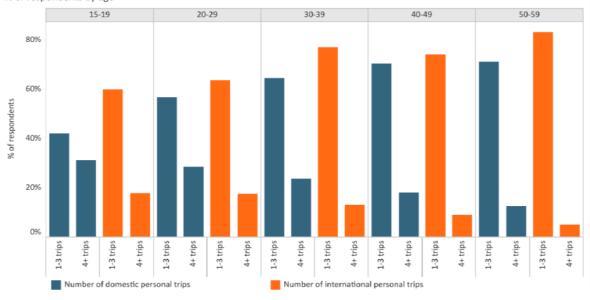


Source: Euromonitor International Lifestyles Survey 2019

Leisure: vacations by age

In the past 12 months how many vacations/holidays did you take?

% of respondents by age





1. UAE OUTBOUND TRAVEL TRENDS

TRAVEL COMPANION

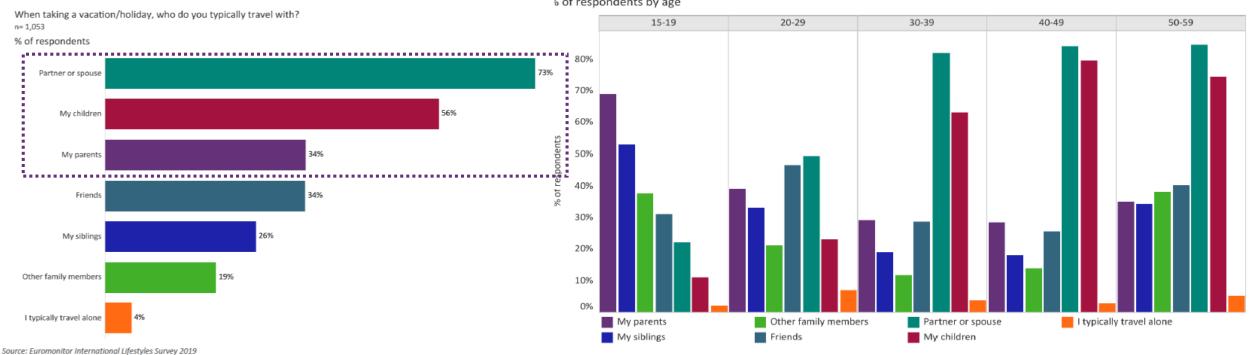
Majority is travelling either with family (or extended family) or with partner or spouse

Leisure: travel companions by age

Leisure: travel companions

When taking a vacation/holiday, who do you typically travel with? = 1,053

6 of respondents by age



Source: Euromonitor International Lifestyles Survey 2019



1. UAE OUTBOUND TRAVEL TRENDS

CONSUMER BEHAVIOUR AND LEISURE HOLIDAY WISH LIST

CONSUMER OVERVIEW IN THE UNITED ARAB EMIRATES

Leisure

- With very long average working hours, United Arab Emirates residents have relatively little downtime. Our survey found that 75% of respondents ended up working at home at least once a week. Many high-skilled expats are cash rich and time poor, and, as such, favour luxury experiences. As many as 68% of consumers thought it was important to spend money on experiences (compared with 56% globally), while 63% sought curated experiences tailored to their particular tastes.
- Dubai is the home of some of the world's biggest shopping malls, which act as vast entertainment complexes that provide relief from soaring summer temperatures. Our survey showed that 50% of United Arab Emirates respondents ate at a restaurant at least once a week (versus just 30% globally), while 47% of Baby Boomers reported socialising with friends, and 23% of Millennials shopped for leisure at least weekly.
- The United Arab Emirates' technologically advanced society lends itself well to digital entertainment. Indeed, 55% of consumers said they valued "online virtual experiences". As many as 78% accessed social media on their phones at least once a week, while the same percentage watched TV/video, 59% played games and 43% streamed music.
- With 88% of the population made up of foreign workers, and citizens entitled to 34 days of annual leave, the United Arab Emirates ranked top in our survey with regards to the number of respondents taking at least once international trip a year (86%). Oman was the most popular outbound destination.

High on holiday wish list:

- Nature and outdoor activities
- Shopping
- Immersion in local culture

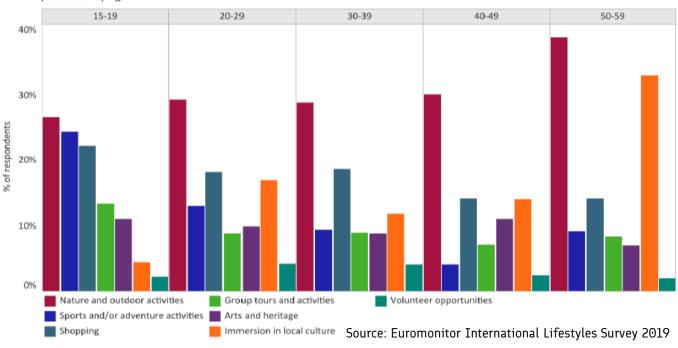
For the younger generations:

Sports and adventure activities

Leisure: holiday wish list

What travel destination features are most important when planning future vacations? n= 1,053

% of respondents by age





1. UAE OUTBOUND TRAVEL TRENDS

LEISURE HOLIDAY WISH LIST

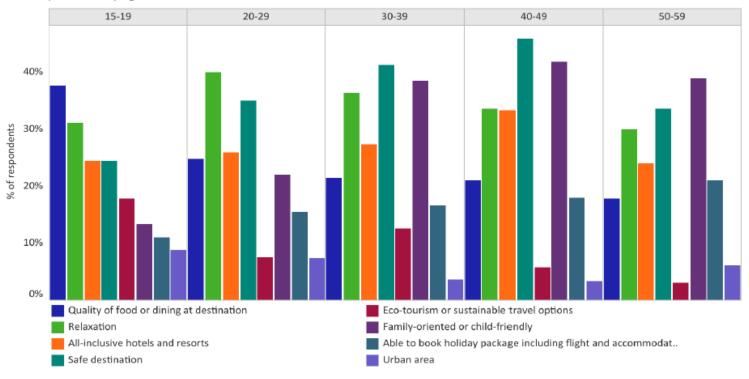


CONSUMER OVERVIEW IN THE UNITED ARAB EMIRATES

Leisure: holiday wish list by age

What travel destination features are most important when planning future vacations? n=1,053

% of respondents by age



Emirati travellers are especially looking for:

- Relaxation
- Safety
- All-inclusive hotels and resorts

The older generations also

 Family-oriented or child friendly destinations

Source: Euromonitor International Lifestyles Survey 2019

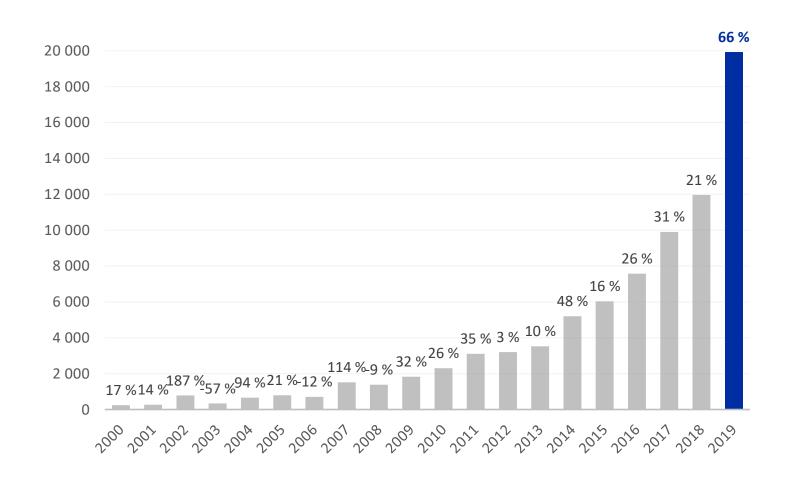




2. INTEREST TOWARDS FINLAND

EMIRATI OVERNIGHTS IN FINLAND





Year 2019

41st in country rankings

Average change 2000-2019: **+34%**

Change 2019 compared to 2010: +764%

Share of overnights by regions 2019







70%

3%

5%

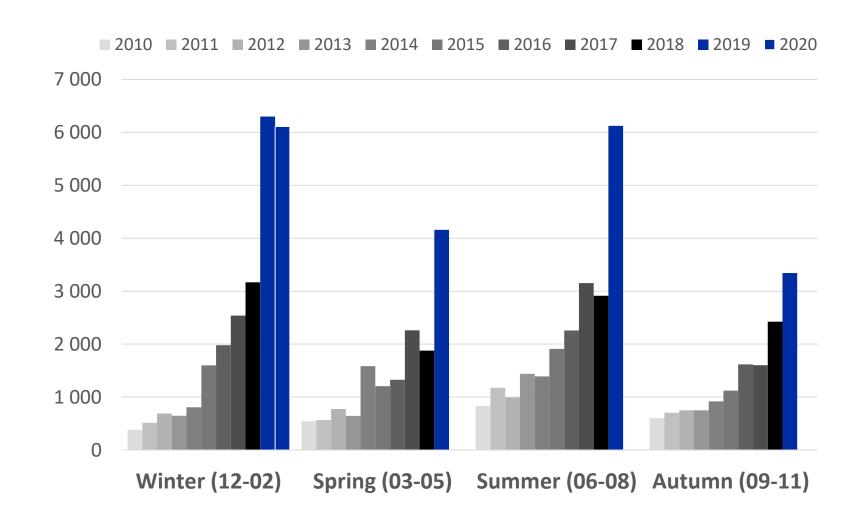
22%

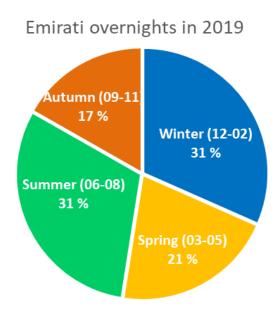


2. INTEREST TOWARDS FINLAND

EMIRATI OVERNIGHTS IN FINLAND BY SEASON

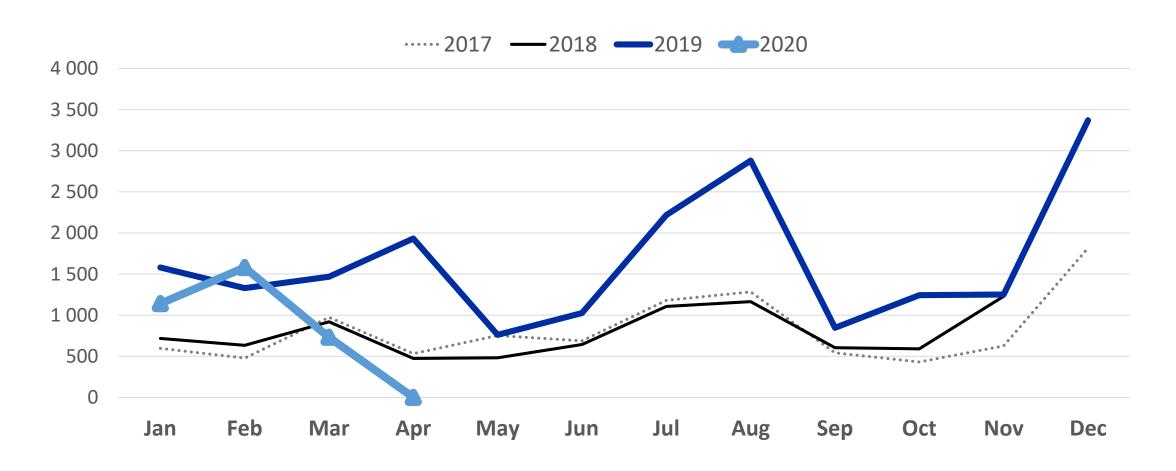








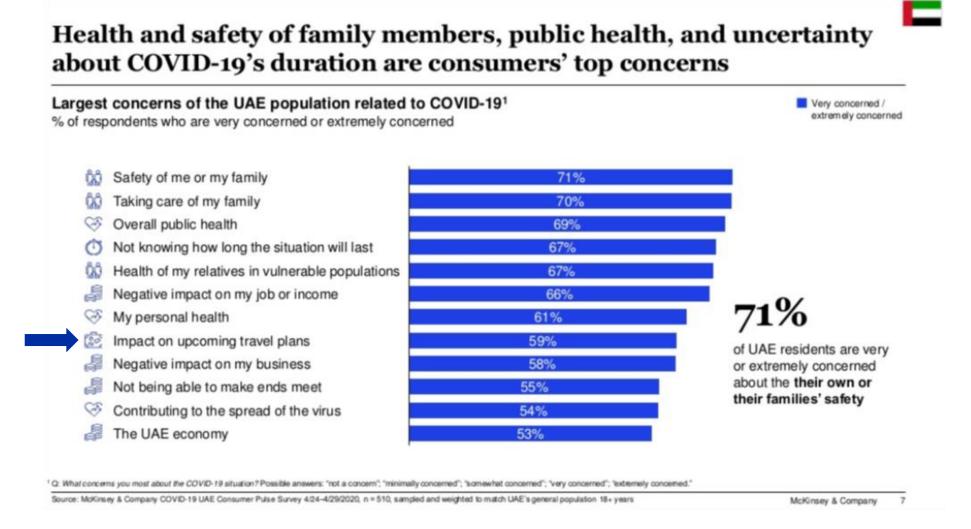
EMIRATI MONTHLY OVERNIGHTS IN FINLAND 2017-2020







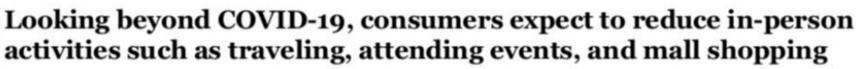
UAE: THE LARGEST CONCERNS RELATED TO COVID-19

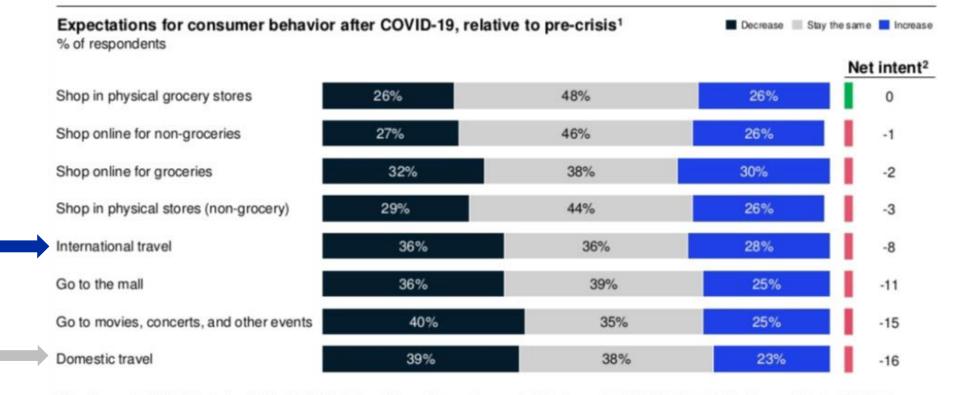




3. AFTER COVID-19: FUTURE OUTLOOK

UAE: EXPECTATIONS FOR CONSUMER BEHAVIOR AFTER COVID-19





¹ Q: Once the coronavirus (COVID-19) situation has subsided, which of the following do you think you will do more or less compared to before the coronavirus (COVID-19) situation started? Possible answers: "will reduce this"; "will do the same as before coronavirus"; "will increase this." Excludes work-from-home category.

Source: McKinsey & Company COVID-19 UAE Consumer Pulse Survey 4:24-4/29/2020, n = 510, sampled and weighted to match UAE's general population 15+ years

McKinsey & Company 11

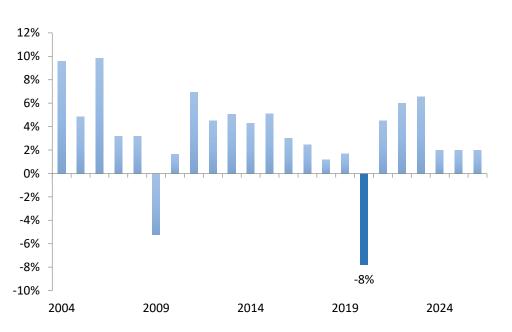


Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating to increase time spent.

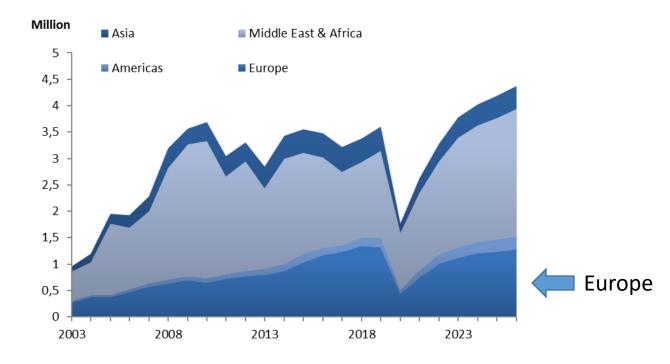
UAE TRAVEL OUTLOOK AFTER COVID-19

Global GDP is forecast to contract 5% in 2020.

United Arab Emirates: Real GDP growth



United Arab Emirates: Distribution of Outbound Travel



Source: Global Highlights & Risks, June 2020 Tourism Economics/ Oxfrord Economics

3. AFTER COVID-19: FUTURE OUTLOOK

COVID-19 IMPACT: OUTLOOK ON TRAVEL FROM UAE TO FINLAND

- BASELINE & PESSIMISTIC1

- According to
 Euromonitor's baseline
 scenario, travel from
 UAE to Finland would
 start to recover in 2021
 and the 2019 level could
 be reached during 2022
- According to the more pessimistic scenario, the recovery would start more rapidly in 2022 and reach the pre COVID level in 2023

Source: Euromonitor International

VISIT **FINLAND**

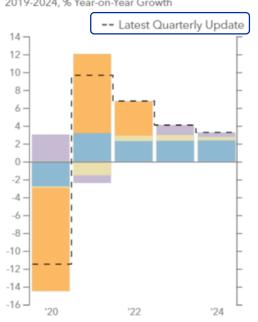


To Finland 2017-2026, '000's





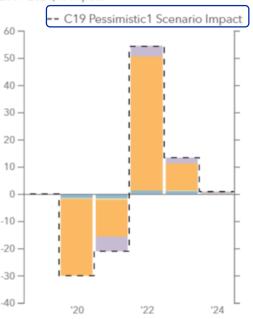
2019-2024, % Year-on-Year Growth



Departures from United Arab Emirates, Growth

To Finland 2019-2024, % Impact

X



Baseline scenario (= blue line, YoY change on the left) / Probability 35-45%

- COVID-19 pandemic peaks in late May/early June.
- The economic upheaval induced by restrictions to contain the coronavirus do not spill over to a large number of bankruptcies, limiting the length and depth of the recession in most countries. Financial crisis is similarly avoided. Therefore, once restrictions are lifted, economies quickly rebound.
- Global GDP growth of -3.8% to -2.6% in 2020

Pessimistic1 scenario (= dotted line, YoY change on the right) / Probability 25-35%

- The pandemic lasts 2 4 quarters
- Global supply chains get disrupted and cashflow mismatches lead to a rise in bankruptcies.
- Global GDP growth of -6.0% to -4.0% in 2020







India Market Update

Sara Sodhi Country Manager- India Visit Finland

India Economic Outlook

- India is now the world's 5th largest economy
- India, in this ranking, has leapfrogged France and the UK.
- The country's GDP growth has been among the highest in the world in the past decade – regularly achieving annual growth of between 6-7%.
- This rapid rise has been fueled by a number of factors, including urbanization and technologies that have improved efficiency and productivity.

These are the world's largest economies

GDP,	current	prices -	US Dollars	

CD., Carrette prices of Deliaire	
2010	2019
1 United States	United States
2 China	China
3 Japan	Japan
4 Germany	Germany
5 France	India
6 United Kingdom	United Kingdom
7 Brazil	France
8 Italy	Italy
9 India	Brazil
10 Russian Federation	Canada

Source: IMF World Economic Outlook, October 2019

In 9 years, India has moved from 9th place to 5th place on the ranking of world economies.

Image: World Economic



https://www.weforum.org/agenda/2020/02/india-gdp-economy-growth-uk-france/

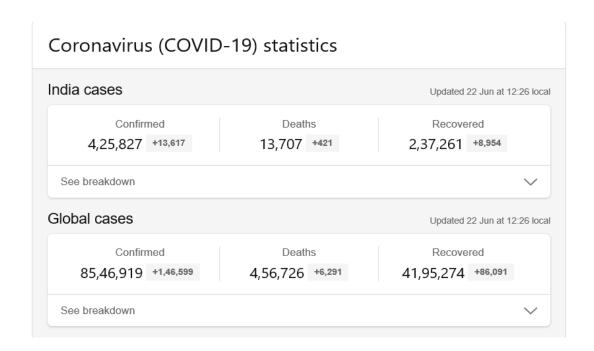


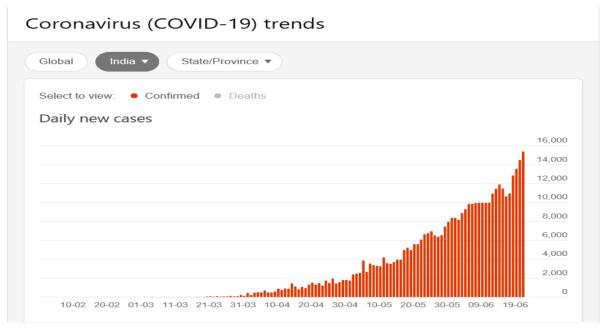
India Economic Outlook – Tourism

- Encouraged by its pace-setting GDP, rising personal income levels and changing lifestyles, India is rapidly becoming one of the fastest growing outbound travel markets in the world.
- In just the last 20 years, the number of outbound tourists from India has grown from 3.5 million to 21.9 million, making it the fastest-growing outbound market behind China.
- The UNWTO predicted that India will account for 50 million outbound tourists by 2020 becoming World's Number 1 Outbound market.
- With more than 20 million Indian nationals now living throughout the world (3.4 million in the US), the volume of outbound travel is increasing about 25% a year.
- India's population (currently 1.3 billion) is expected to overtake China's as the world's largest in the next five years, and its young, tech-savvy, educated middle class will double in size to 547 million shortly thereafter. Within five years, India will also rank as the world's youngest country demographically.
- India is counted as the 'youngest' among all countries in the Asia Pacific region, considering the number of its citizens below 30. According to a study by Amadeus, 23% of Indian leisure travelers are under the 30 age group.
- The sheer size of its rapidly expanding middle class practically guarantees success for India's travel consumer story for the next 20 years. Bigger than the entire US population, India's middle-class today numbers 350 million people.
- A sizable number of Indians have a net worth of more than \$1 million and 180 million Indians three times the population of the UK speaks English, and many of these folks own cars, cell phones and carry credit cards.
- · When traveling abroad, Indian tourists are among the world's highest-spending globetrotters.
- Their spending power has been estimated to be four times that of the Chinese and Japanese.
- The average Indian traveler spends \$1,200 per visit as compared with Americans who spend about \$700, and Brits who spend \$500.



India - Covid 19 Update

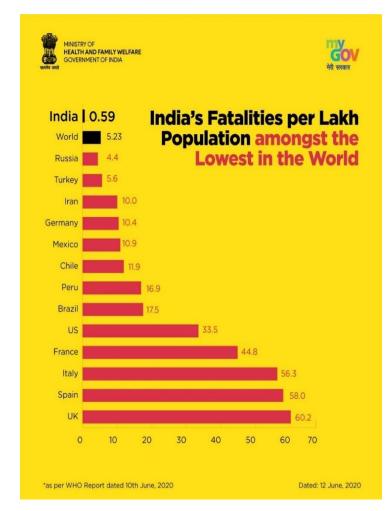


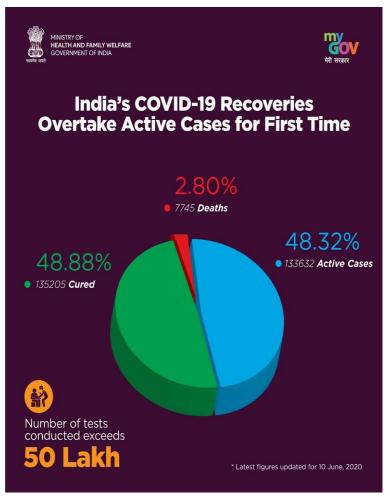




India - Covid 19 Update









India – Market Update

- World's Largest Lockdown (1.3 Billion People) started from March 24,2020
- India's worst affected areas by Corona include the financial hub of Mumbai, capital New Delhi, southern state of Tamil Nadu and the western state of Gujarat.
- After 4 Phases of Lockdown, India is Currently in UNLOCK Phase 1 w.e.f June 8,2020

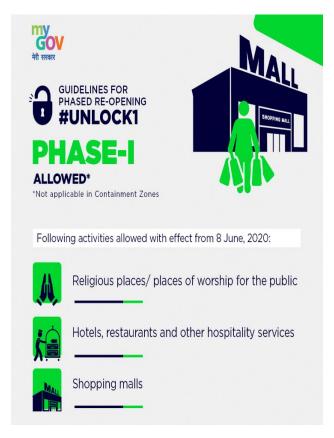


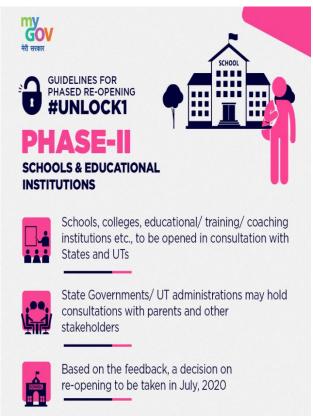






India – UNLOCK Phase 1-3











Economic Outlook : AatmaNirbharBharat Abhiyan



On 12 May the Prime Minister announced an overall **economic** package worth ₹20 lakh crore (US\$280 billion),10% of India's GDP, with emphasis on India as a self-reliant nation.

SOURCE:

https://transformingindia.mygov.in/aatmanirbharbharat/?sector=MTA4Mw==&type=en#scrolltothis



Travel Bans

- All scheduled commercial flights were suspended in India on March 25,2020
- Indians are advised to avoid non essential travel.
- Only essential travel through repatriation flights is permitted under Vande Bharat Mission

Flight Situation

- Domestic Flights resumed operations from May 25, 2020 on select routes in India
- Vande Bharat mission of bringing back stranded Indians from different parts of the World Phase 3 is operational till 2nd July, 2020
- Indian Govt is expected to take the decision in July for the operation of International Flights
- Finnair expected to start Delhi- Helsinki Route from 6th August, 2020 (subject to approval of Indian Government)
- Air India Flights to Stockholm & Copenhagen (Subject to Govt approvals)
- MOU Signed with Indigo Airlines in India for flights to Helsinki



52% people willing to travel post lockdown; frequent flyers to lead growth: DIAL study

May 28, 2020



Sharing the details of a study during a webinar organised by TAAI- Northern Region, the Delhi International Airport Limited (DIAL) has revealed that 52 per cent of the people are willing to travel amidst lockdown. The growth will be led by frequent flyers (those who take more than eight flights a year) with 68% of them keen on travelling once things are normal. DIAL's report titled 'Intention to travel among Indian passengers,' also stated that in the COVID-19 control phase, travel likelihood increases significantly with 58 per cent of the people opting for it. The impact was seen across all types of flyers. The number of frequent flyers will rise to 73 per cent in the post-COVID-19 era.

Business and VFR traffic from Delhi back to pre-COVID level: DIAL



Videh Kumar Jaipuriar, CEO, Delhi International Airport Limited (DIAL), has said that after the resumption of flights from Delhi Airport, the percentage of business and Visiting Friends & Relatives (VFR) travel is same as pre-COVID levels. "That shows the confidence passengers are showing in the SOPs," he added.

Domestic airline traffic goes up by 100 per cent- Puri

In a media briefing, Puri said that the domestic flight operation now was up by 100 per cent to about 70000 passengers on a daily basis from a modest 30000 since air travel resumed on May 25.



Travel Trade

- As per BOTT India survey, 73 per cent travel companies have gone for adjustment of workforce including pay cuts, deferment of salaries, termination of contracts, while 67 per cent have gone for steps like reduction of overheads.
- About 49 per cent are deferring their capital expenditures and interestingly, 41.6 per cent companies are introducing new services.
- Travel Companies are currently under financial crunch (currently focusing on Knowledge Enhancement, New Product Development, COVID -19 Strategies, New Travel Protocols etc.)
- Most employees are still working from Home.
- Retail Outlets of some travel companies have opened in several states (Orange & Green Category)
- Smaller Travel Companies are under financial crunch and striving to survive.
- Travel Trade is disappointed with the Indian Government as no Stimulus package has been offered to tourism, hospitality & aviation sector.
- Attractive Offers are being launched for regular engagement with consumers .. "Book Now Travel Later" "Dream Now Travel Later"
- Virtual MICE Platforms have been developed by leading MICE Companies



Actions on the Market – Travel Trade B2B

- Most of the joint promotion campaigns and other marketing campaigns are postponed
- PR Trips and PR events postponed, but communication and relations stay active
- All FAM's and marketing actions are postponed to Q4 or cancelled for 2020
- Destination Training Webinars Indian Travel Fraternity
- 25+ Webinars Conducted; 4700+ Agents educated on Finland
- How to serve India & UAE Market Webinar Conducted for Ruka Kuusamo Region
- Regular Contact with TA, TO's & OTA's
- VF Luxury Manual 2020 Shared with potential luxury partners
- Agents updated on the launch of "Sustainable Travel Finland" Brand
- Recovery Plan 2020: ready to reactivate the market with our existing joint marketing agreements this year asap: most probably Q4 winter season.
- India Team Planning in progress for 2021

Visit Finland

Regular Coverages of Finland in B2B Trade Media (Trav Talk, TTJ, Travel Biz Monitor etc)

Actions on the Market - PR (FOC)

- Rent A Finn 2.0 Instagram Live Hosted on National Geographic India with Happiness Guide Jukka
- 6,000 people cumulatively tuned in for the IGTV Live. 22k+ Views



• Regular Press Coverages of Finland in B2B & B2C Publications with Inspirational Content (Conde Nast Traveller, National Geographic, Lonely Planet India)







Latest Travel Trends

- Domestic travel will pick up in the next few months; people will initially prefer smaller holidays to destinations that are a short drive from the city. The countryside will be more popular.
- Luxury tourism, HSFIT's are less affected and will restart travelling the first, also together with family for breathing fresh air, stay in nature
- Group tours are unlikely to pick up soon with people hesitant to travel with strangers and mingle with each other.
- Instead, families will go on holidays with a small group of friends, often not exceeding 10 or 20 people.
- Shopping sprees and gourmet dinners at upscale restaurants will be replaced by nature walks, treks and cosy getaways where chances of large crowds are slim.
- Luxury boutique resorts, private villas and experiential accommodations will be in demand over large resorts and chain hotels that accommodate a larger number of guests and staff.
- Holiday planning is likely to go offline again as people ask experienced travel consultants to plan their trips for them. In the past few years, travelers had begun using travel websites more to review and reserve hotels, tickets and local experiences.
- People now want advice from the experts on which places are clean and hygienic. They want someone to talk to if their travel plans go awry, rather than an automated system.
- Travelers are veering towards wellness breaks in the outdoors rather than fast-paced holidays with sight-seeing and shopping itineraries.
- Rise in demand for chartered aircraft and yacht holidays for the wealthy traveler is predicted. Yacht holidays and chartered
 planes ensure that you don't come in contact with other people. You can travel with just your family or friends.



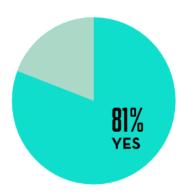
Traveller Traveller

THE INDIAN LUXURY TRAVELLER REPORT: COVID EDITION

Condé Nast Traveller India's survey of 3,500 luxury travellers' attitudes towards travel in the wake of the pandemic

HIGH-END TRAVELLERS WILL LEAD THE RECOVERY OF THE TRAVEL INDUSTRY
ONCE PENT-UP AND ESSENTIAL DEMAND SUBSIDES

MISSED
TRAVELLING MORE
THAN ANYTHING ELSE?



INTERNATIONAL TRAVEL IS SET TO REBOUND

ARE YOU OPEN TO AN INTERNATIONAL VACATION THIS YEAR?

21%

44%

definitely open

depending on the situation

WHAT KIND OF HOLIDAY WOULD YOU LIKE?

64% Z

56%beaches

29% 👬

29%wellness

J /o þ

56% Anywhere in nature

LUXURY TRAVELLERS ARE WILLING TO PAY MORE FOR SAFETY AND SANITISATION

53% are willing to pay extra for daily deep-cleaning

37%

would pay extra for a 'one-night buffer'—where the room remains unoccupied for a day before arrival

9% would pay extra for a personal

butler/attendant/resort host

not willing to pay extra for any services

38%
A hotel that is part of a trusted chain

WHERE WOULD YOU LIKE TO STAY?

20%

A boutique hotel with fewer rooms



A private villa or apartment



A homestay

Opportunities for Finland

- Ideal Destination for HSFIT's / Luxury Travel from India First Sector to revive International Travel from India
- Opportunity for Finland to gain new visitors, usually travelling to long haul destinations from India (Like US, AUS, NZ).
- Responsible Travel by Indians
- Sustainable Travel Opportunities in abundance in Finland
- Safe and Secure country
- Pure Nature , Air & Water
- Not overcrowded

Visit Finland

- Experiential Travel / Bucket List Experiences Santa Claus, Northern Lights, Staying in Igloos, Berry Picking, Cottage & Sauna Holidays etc.
- Experiential Accommodations

MAIN MESSAGE FROM THE INDIAN TRADE TO THE FINNISH PARTNERS:

FLEXIBILITY AND ATTRACTIVE OFFERS; to gain confidence back in the market and rebuild volumes to our destination.

THANK YOU







Ms. Suzanne Pereira Sr. Vice President, Trade Relationships Communications & Service Quality Thomas Cook (India) Ltd





Nour Aridi Market representative UAE Visit Finland

United Arab Emirates

General Information

 The United Arab Emirates occupies an area of 83,600 square kilometers altogether and is made up of seven monarchies: Abu Dhabi, Ajman , Dubai , Fujairah , Ras-Al- Khaimah, Sharjah and Umm Al Quwain.

 The land is nestled between <u>Oman</u> and <u>Saudi Arabia</u> in terms of land and has 1,318 kilometres of coastline on the Persian/Arabian Gulf.

 Additionally, the three largest emirates - Abu Dhabi, Dubai, and Sharjah - are home to nearly 85% of the population.

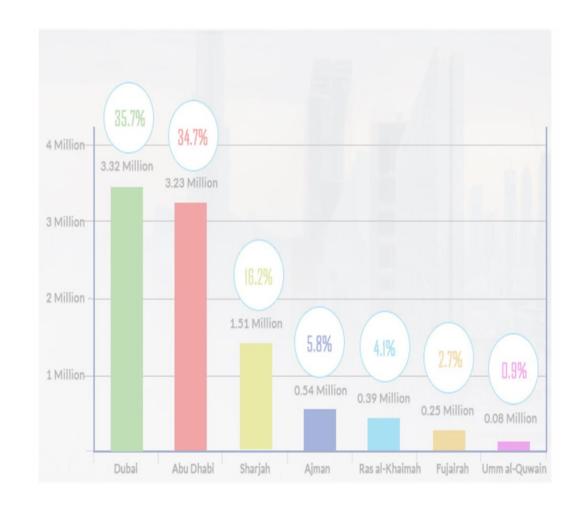




United Arab Emirates

Demographic

- The population currently stands at 10.104, 467 million people
- Population ranked 91 (0.13% of World Population)
- Total Area of 83, 600 km²
- Sex Ratio 2.28 (70% of Male- 30% of Female)
- The UAE has one of the highest male to female population ratios in the world and is far ahead of other Arab countries because of its heavy reliance on expatriate male workers.
- Median Age is 33 years
- Literacy 93.8%





UAE Travel Pre-Covid19

Outbound Destination

Long Trip/Haul:

Traditional Europe: London, Paris, Barcelona are favourites for the travellers for the wide choice of activities shopping, sight-seeing, and cultural visits.

Greece a destinations loved by the UAE Expatriates.

Finland, Sweden , Amsterdam were in top destination 2019.

Far East and South East Asia: Thailand Malaysia Indonesia are among summer favorites breaks for families and emerging destination such as Japan Singapore were among adventurous travelers.

Americas: appreciated by Middle Eastern travellers New York remained number 1.

Short Trip/Haul:

Intra-region: Muslim resident of all group will perform Hajj and Umrah in Saudi Arabia.

Central Asia: Georgia, Azerbaijan, Uzbekistan, Armenia benefit form LCC routes via agreements and competitive pricing.

Balkans Countries: Turkey, Bosnia Herzegovina and Croatia

Turkey has for long been part of the UAE and Middle east traveler's favorites despite political unrest.

India Subcontinent and Ocean: Sri Lanka have seen increased from the Middle east and UAE, Maldives remain in top destination

Domestic:

Levant, Egypt and Saudi Arabia: give their residents to enjoy domestic breaks

In Saudi the Holy Cities of Makkah and Madinah are of course regularly visited by local pilgrims.

In Egypt: Red Sea-Sharm el Sheikh , Alexandria, Luxor Aswan

UAE Staycation from strong to stronger with diversity of offerings and multi-destinations.



UAE Travel Pre-Covid19

Market expenditures & Booking Pattern

□ Expenditures

Average Spend: USD 1,150 to USD 3,153

Per Day Per Person (Excluding Airfare)

☐ Key Market Segments

Leisure: 60%

Business: 30%

M.I.C.E: 10%

☐ Booking Pattern

Retail: 25% Via Travel Agencies

Online: 60% via B2C Platforms

Independent: 15% directly with the Hotels/Airlines



COVID19: UAE Impact

Covid19 Case

Date of first Covid19 in UAE: 29 Jan 2020

The COVID-19 pandemic in the United Arab Emirates is part of the worldwide pandemic of coronavirus disease 2019 (COVID-19) caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2).

The first confirmed case in the United Arab Emirates was announced on 29 January 2020. It was the first country in the Middle East to report a confirmed case.

The first patient, a 73-year-old Chinese woman, was released on 9 February after recovering.

The first two deaths were confirmed on March 20.

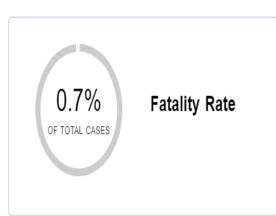


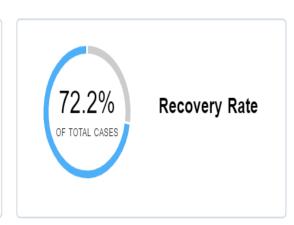
UAE Current Situation

Current numbers of COVID19 In UAE

22 June 2020 – 392 cases

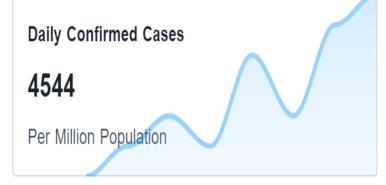














UAE Measures

Emirate: Dubai

Visit Finland

□ Dubai

- On 22 March, Dubai started an 11-day sterilisation campaign as an effort to contain the coronavirus.
- Night curfew was imposed 4 days later while the country began disinfection.
- Disinfection Program from 8 pm to 6 am daily, access to retail food outlets allowed, traffic and people movement to remain normal during daytime
- The Ministry of Health stressed that all retail food outlets such as cooperative societies, supermarkets, grocery stores and pharmacies remained open 24/7.
- On 26 March, the country imposed night curfew as disinfection in the country began.

- On 28 March, the country announced that curfews and disinfection would be extended until April 5.
- On March 31, Al Ras area, one of Dubai's densely populated areas that's home to the gold souk and museums, was placed under lock down for two weeks starting 31 March preventing all residents from leaving or entering the area.
- On 4 April, a curfew was imposed on Dubai, with stricter restrictions on movement imposed, which was reduced to 10-hours from 10:00 pm and 6:00 am starting April 24.

UAE Measures

Emirate: Abu Dhabi & Sharjah

☐ Abu Dhabi

Movement ban between regions within Abu Dhabi and in and out of the emirate extended by one week. Abu Dhabi Emergency, Crisis and Disaster Committee for the COVID-19 Pandemic, in collaboration with Abu Dhabi Police and DoH, have announced that the Abu Dhabi movement ban is to be extended by one week that started in the 9th June,

The ban covers movements between Abu Dhabi's regions (Abu Dhabi, Al Ain and Al Dhafra) as well as in and out of the emirate. It applies to all Abu Dhabi residents, including UAE Nationals. Exemptions are available by special permit for employees in vital sectors, chronic disease patients visiting hospitals, and the transportation of necessary goods.

■ Sharjah

Curfew from 8PM to 6AM

The Measure taken by the UAE government has reassured different destinations and increase their appetite to welcome UAE travellers.



UAE Economical Measures

Economy

On 23 March, the government shut malls for two weeks. Fish, meat and vegetable markets also closed for a renewable period of two weeks.

On 23 April, both Abu Dhabi and Dubai governments announced that some restrictions were being reduced in respect to mall closures with their respective economic departments stating that they were consulting with stakeholders in opening malls in line with government plans for a gradual increase in economic activity in the country.

The types of shops allowed to reopen is very limited with regulations to not exceed 30% capacity at any time.

Dubai government offices to resume work with 100 per cent employees from June 14

and from Sunday, May 31, government offices will start work with 50% staff- Precautionary measures will continue to be strictly enforced in government offices.

Job Loss- estimation of 900 000 people will lose their job by the end of December 2020 and an estimation of 1.2 Million will leave the UAE.



UAE Educational Measures

Education

On March 3, UAE's Ministry of Education announced that schools On 18 March, UAE advisory asking Emirati students abroad to and universities across the country will close for a month starting Sunday, March 8, as part of efforts to contain the spread of coronavirus. Spring break, which originally begins on March 29, instead began on March 8 and lasted for two weeks. Distance learning was introduced during the remaining two weeks, with pupils learning from home.

On 30 March, UAE announced that the 2-week online "distance learning" for schools and universities would continue until the end of the academic year in June.

immediately return if their university closes.

On 24 March, UAE called for all Emirati students studying abroad to return within 48 hours.



COVID19 Impact On UAE Travel

Air Connectivity

☐ Airlines

- Emirates and Etihad Airways will resume some transit flights after the United Arab Emirates (UAE) lifted a suspension on services where passengers stop off in the country to change planes, or for refuelling.
- Dubai's Emirates, one of the world's biggest long-haul airlines, it operate transit flights to 29 destinations in Asia, Europe and North America by Jun 15.
- Abu Dhabi's Etihad, meanwhile, carry transit passengers to 20 cities in Europe, Asia and Australia from Jun 10.
- Emirates and Etihad Airways will resume passengers flight on the 1st of July 2020.
- Flydubai resume passengers flight from the 5th of June to certain destinations (including to Muscat/Oman, Baku/Azerbaijan, Salalah/Oman, Bahrain, Tblisi/Georgia, Dushanbe/Tajikistan and Amman/Jordan)
- Finnair will resume flight from UAE to Helsinki in October 2020.



COVID19 Impact on UAE Travel

Trade industry

☐ Travel Agencies

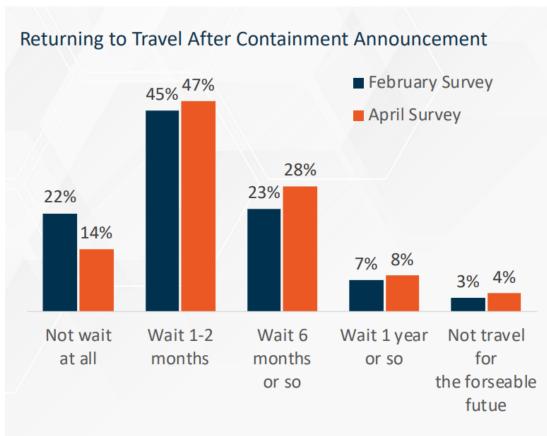
Travel Agencies are currently on unpaid leave, paid leave or had their salaries reduced.

UAE agents remain positive and work on different activities in diversifying their business or think differently in promoting their business in the future.

The Major travel agencies are now returning to their offices slowly focusing on repatriation, quarantine accommodations, staycations, and short haul regional destinations.



Covid19 Impact UAE Travel



The change of sentiment between February and April is aligned with the global spread of pandemic.

It is fantastic to see that some 89% respondents would travel within 6 months on containment announcements.



Recovery phases highlight

Phase 1 – Limited Demand

(Long Stay, Quarantine/Isolation, Solidarity)

Phase 2 – National Demand

(Staycation)

Phase 3 – Regional Demand

(Short Haul Leisure & Business Travel demand from neighboring countries)

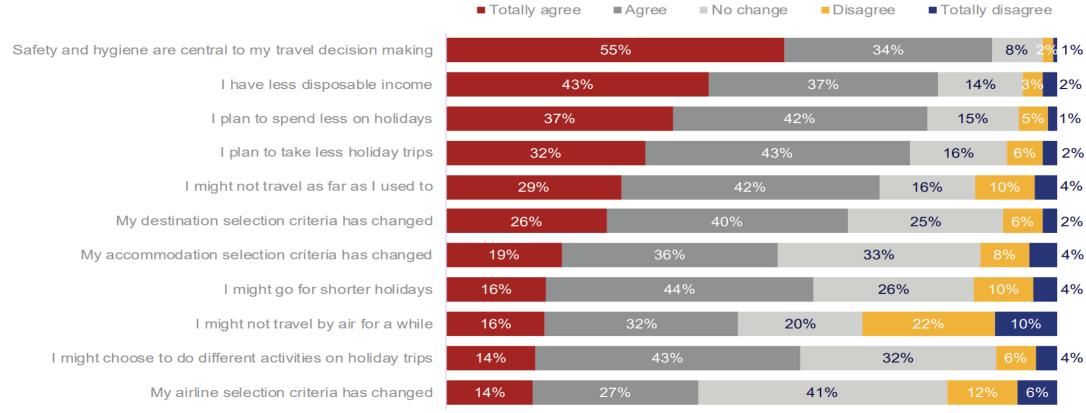
Phase 4 – Long Haul International Demand

(Traditional Leisure markets & Limited Business Travel)



Post Covid19 Trends highlights

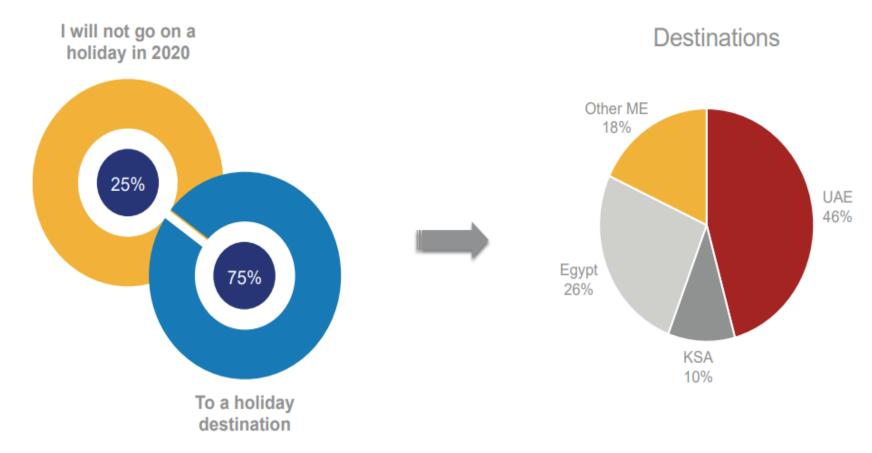
How would the Coronavirus Crisis affect your future holiday travel behaviour?





Post Covid19 Trends highlights

• Where would you go for holiday?



Post Covid19 Trends highlights

How long would you stay away from home?





Post Covid19 Trends highlights

How would the increased screening time at airports affect your travel planning?





Post Covid19 Trends highlights

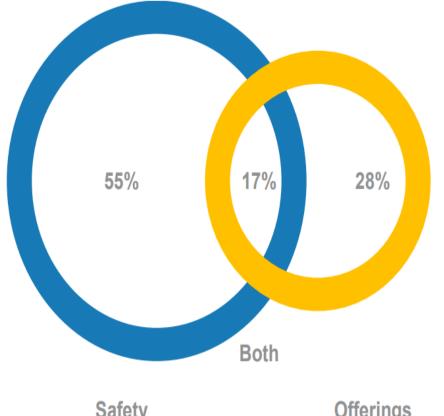
What would make you choose a specific holiday destination?

Actions to contain COVID-19 cases

Messaging and communication around COVID 19 prevention

Number of COVID 19 cases

Safety and security



Attractions & activities

Prices and packages

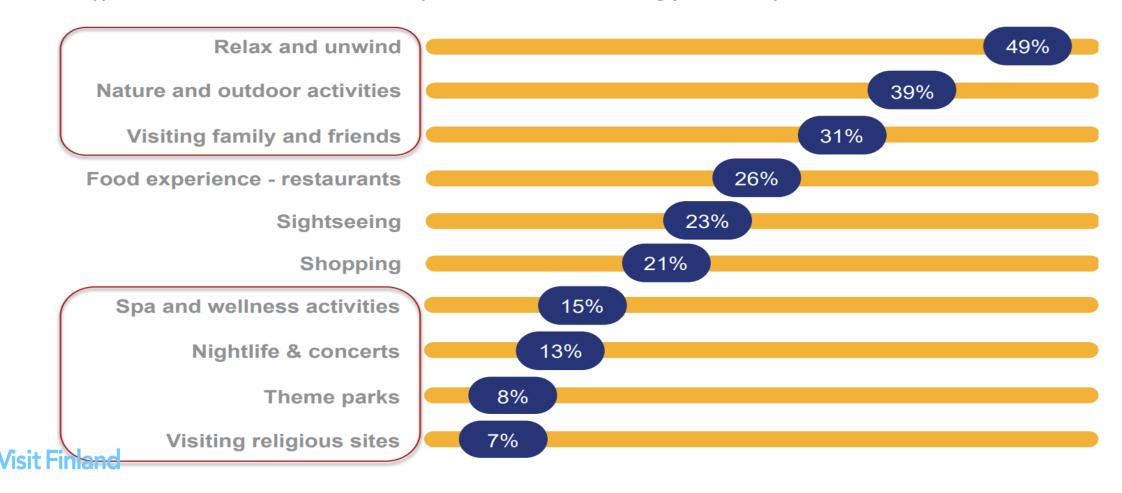


Safety

Offerings

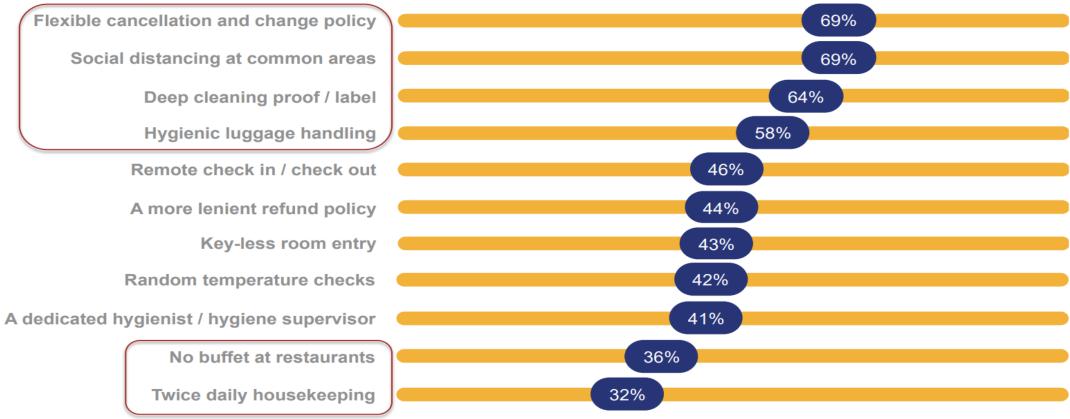
Post Covid19 Trends highlights

What type of attractions or activities would you like to visit or do during your holiday?



Post Covid19 Trends highlights

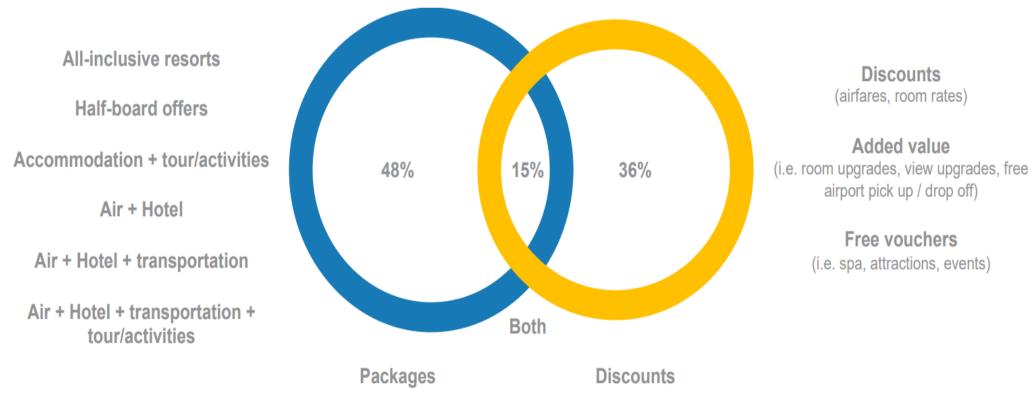
Which of the following measures do you expect from travel providers?





Post Covid19 Trends highlights

Which holiday offers/packages would you be interested in?





Summary

Travel authorities and providers across the region are required to work together to create travel corridors (i.e. visa and quarantine free) in order to drive the travel sector into realising the great potentials that lie in domestic and inter-regional travel.

The return of domestic holiday travel within the Middle East might be the first sign of recovery and it will extend a lifeline to many struggling businesses



Visit Finland Activities in the Market

- ☐ Joint Promotion has been cancelled with our trade partners.
- ☐ Dubai Expo 2020 has been postponed to October 2021.
- November 2020 Roadshow has been cancelled.
- ☐ Since March 2020 Webinars has been conducted with key players in the market such as to name a few:
 - Flydubai
 - Dnata Travel (Dubai)
 - Dnata Travel (Middle East)
 - Cozmo Travel
 - Emirates Holidays
 - Etihad Holidays
 - Hotelbeds
 - Qatar Airways Holidays
 - IFA Travel
 - Al Rostamani Travel
 - ATE Travel





KIITOS

We will see you soon

UAE wish They were in Finland.



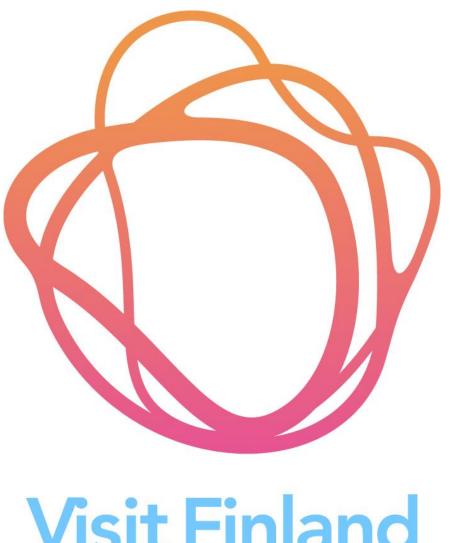




Emily Jenkins
Head of Retail & Product Leisure
Dnata Travel Leisure







Visit Finland