

8 May 2019

TALLINK TOWARDS TO TRUE OMNICHANNEL CX

LAURI LÄHEB

GROUP BUSINESS DEVELOPMENT & OPERATIONS

 TALLINK | SILJA LINE 

TALLINK GROUP 2018

- 14 vessels; 4 hotels
- 950 MEUR revenues
- 9.8 M passengers
- 385 thous. cargo units
- 7 400 employees
- Stock listed company



GLOBAL RETAIL & SERVICES RANKINGS

THE WORLD'S TOP DUTY FREE & TRAVEL RETAIL SHOPS

Ranking by actual and estimated retail sales in 2017

Rank	Location	Country	Channel
Sales > US\$ 1 700 million			
1	SEOUL - Incheon Int'l Airport	South Korea	Airport Shops
2	DUBAI - Dubai International Airport	UAE	Airport Shops
3	SINGAPORE - Changi Airport	Singapore	Airport Shops
Sales > US\$ 1 000 million			
4	LONDON - Heathrow Airport	UK	Airport Shops
5	BANGKOK - Suvarnabhumi Airport	Thailand	Airport Shops
6	SHANGHAI - Pudong Airport	China	Airport Shops
Sales > US\$ 900 million			
7	HONG KONG - International Airport	Hong Kong	Airport Shops
Sales > US\$ 800 million			
8	BEIJING - Capital Airport	China	Airport Shops
9	PARIS - Charles de Gaulle Airport	France	Airport Shops
Sales > US\$ 700 million			
10	TOKYO - Narita Airport	Japan	Airport Shops
Sales > US\$ 600 million			
11	FRANKFURT - Frankfurt-Main Airport	Germany	Airport Shops
12	TALLINK - All Routes	Estonia	Ferries
13	TAIPEI - Taoyuan International Airport	Taiwan	Airport Shops
Sales > US\$ 500 million			
14	ISTANBUL - Atatürk Airport	Turkey	Airport Shops
15	AMSTERDAM - Schiphol Airport	Netherlands	Airport Shops

Source: Generation Research 2018



Megastar Traveller Superstore

FERRY OPERATOR BY GROSS TONS

Rank	Company	Gross tons
1	Stena Line	935 898
2	Grimaldi Lines	732 232
3	Moby Lines	550 580
4	Tallink	525 724
5	Grand Navi Veloci	425 220

FERRY OPERATOR BY BEDS

Rank	Company	Beds
1	Tallink	24 328
2	Moby Lines	19 066
3	Stena Line	17 225
4	Grand Navi Veloci	16 629
5	Grimaldi Lines	16 133

FERRY OPERATOR BY REVENUES

(EUR million, 2017)

Rank	Company	Revenue
1	DFDS Group	1 925
2	Stena Line	1 322
3	Tallink	967
4	Finnlines	536
5	Viking Line	523

Data: Ro/pax / ferries above 1 000 GT
Source: ShipPax MARKET:18; Company reports

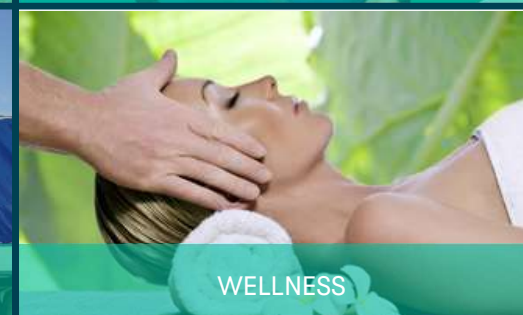
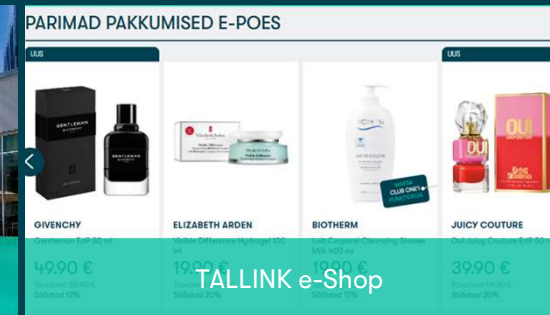
WIDE RANGE OF DINING CONCEPTS ON OUR SHIPS

OWN BRANDS AND INTERNATIONAL PREMIUM BRANDS

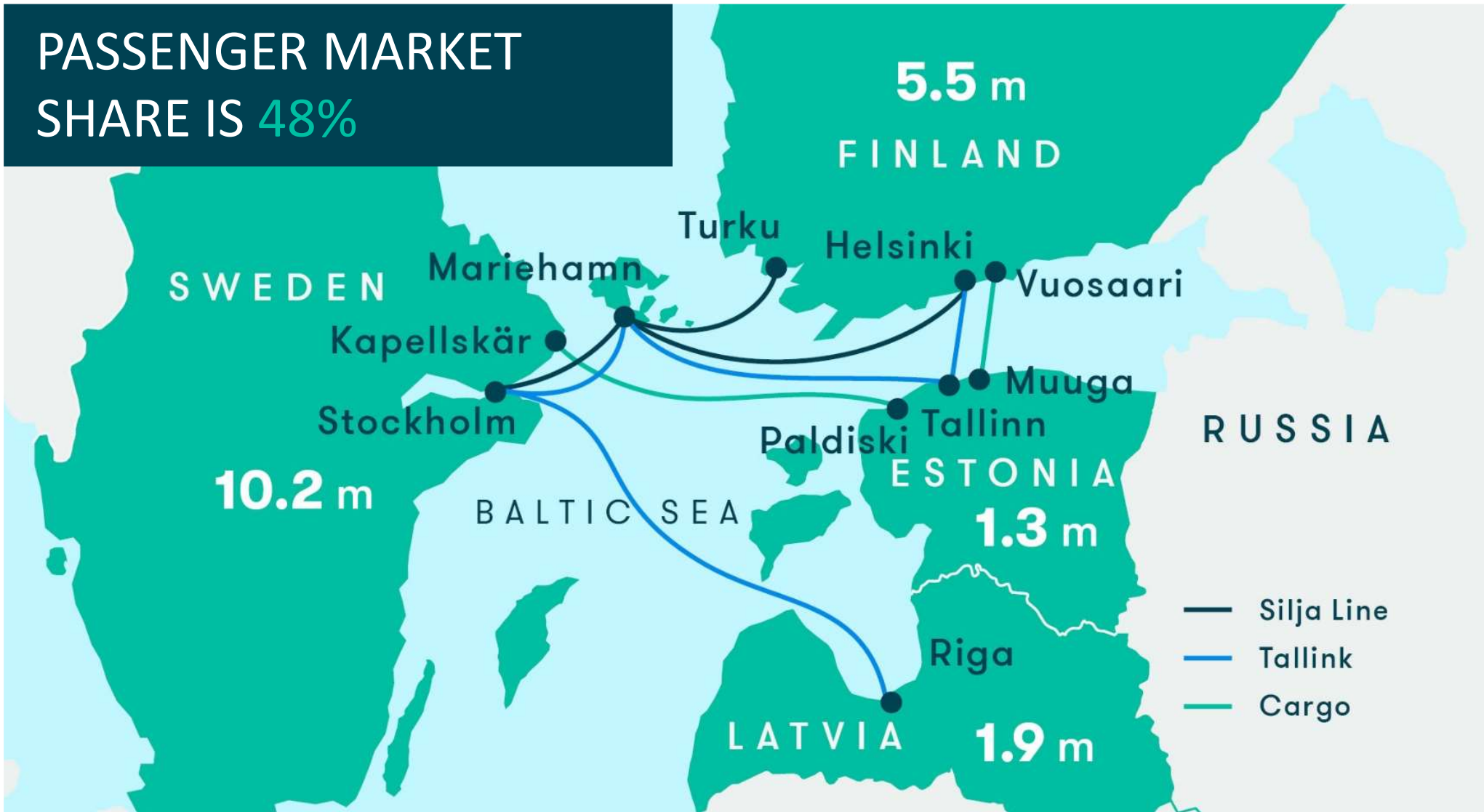
<p>BUFFET RESTAURANTS</p>	 <p>GRANDE BUFFET</p>  <p>DELIGHT BUFFET</p>
<p>À LA CARTE RESTAURANTS</p>	 <p>GRILL HOUSE RESTAURANT</p>  <p>TAVOLÀTA RISTORANTE ITALIANO</p>  <p>HAPPY LOBSTER</p>  <p>The Dining Room</p>  <p>The Chef's KITCHEN</p>
<p>FINE DINING RESTAURANTS</p>	 <p>BON VIVANT restaurant</p>  <p>Gourmet VICTORIA</p>  <p>Gourmet Baltic Queen</p>  <p>ALEKSANDRA RUSSIAN A'LA CARTE</p>
<p>QUICK SERVICE RESTAURANTS</p>	 <p>COFFEE & CO.</p>  <p>FAST LANE</p>  <p>WE PROUDLY SERVE</p> <p>Sushi & Co.</p>  <p>BURGER KING</p>

OMNICHANNEL BUSINESS MODEL

RETAIL & SERVICES



PASSENGER MARKET
SHARE IS 48%



> 14% PASSENGERS COME OUTSIDE OF HOME MARKETS



ONLINE CHANNELS IN 17 LANGUAGES

- | | | | | | |
|---|---|--|---|--|---|
|  China |  Finland |  Italy |  Lithuania |  Poland |  Russia |
|  Denmark |  France |  Japan |  Netherlands |  Spain |  International |
|  Estonia |  Germany |  Latvia |  Norway |  Sweden | |

MARKETING & SALES CHINESE FOCUS

- Cooperation: travel agencies, online tour operators, Asian SoMe platforms; airlines, Nordic/Baltic tourism boards; ...
 - Kuoni, Utour, Mafengo, Qyer, Alitrip, Ctrip, Finnair, Air China, ...
- Tallink own sales & marketing channels
 - Marketing web`s and online bookings in Asian languages
 - SoMe channels and cross- marketing (incl WeChat, Weibo, Youku)
 - Asian payments methods
 - ...



The image displays a promotional banner for Alipay and a Weibo post. The banner is red and white, featuring the text "支付宝扫码享优惠 单笔消费满30元 立减10元 人民币" (Scan Alipay QR code to enjoy discount, single transaction over 30 yuan, instant 10 yuan off in RMB). It includes a QR code and logos for ePassi, Alipay, and Tallink/Silja Line. The Weibo post is from "塔林客诗丽雅游轮" (Tallink Silja Line) and promotes a lucky draw for a cruise ticket. The post text is: "#中国福# 又是福气满满的春节到, 人在#北欧旅游#也别忘了扫福集福、互相沾福气。让小诗给大家送上一份额外的福气! 转发微博, 2月4日五福开奖后, 我要抽取1位福星, 给他福气加码, 送上赫尔辛基-塔林商务舱往返船票一张 (2019年全年有效, 6月22日至8月11日除外。可带一人同行)。祝朋友们五福临门、万福金安。@微博抽奖平台 @支付宝 收起全文" (China Fortune # It's another Spring Festival full of good fortune, people in #Nordic Travel# don't forget to scan and collect good fortune, and share it with each other. Little Poem will give everyone an extra good fortune! Retweet the Weibo, after the 5 good fortunes lottery on Feb 4th, I will draw 1 lucky star, add good fortune to him, and send a round-trip business class ticket between Helsinki and Tallink (valid for the whole year of 2019, except from 6/22 to 8/11. Can bring one person along). Wish friends five good fortunes, ten thousand good fortunes. @Weibo Lottery Platform @Alipay Collapse all text). The post includes a grid of images showing the numbers 2, 0, 1, and 9, along with photos of the cruise ship and a ticket.

ONBOARD SHIPS CHINESE FOCUS



People and Service

Digital info

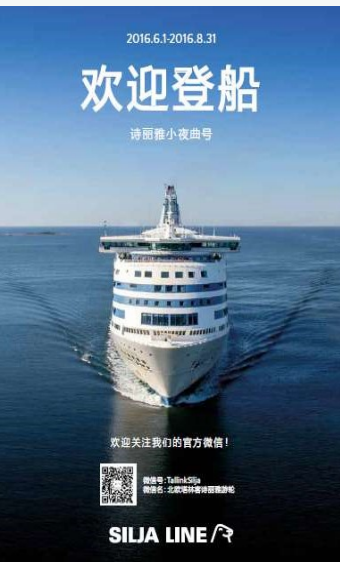
Chinese customer CX

Printed info

Dining

Shopping

Entertainment



OMNICHANNEL TOUCHPOINTS

→ MANNED

- Onboard sales points
- Contact centre
- Terminal desks
- Onboard ship desks
- ...



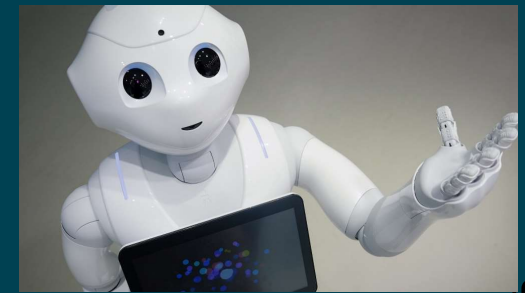
→ DIGITAL

- Personal screens (big and small, ...)
- Self service kiosks (tickets, food, beverages)
- Web Chatbot
- Digital screens on ships / hotels (public areas, cabins)
- ...

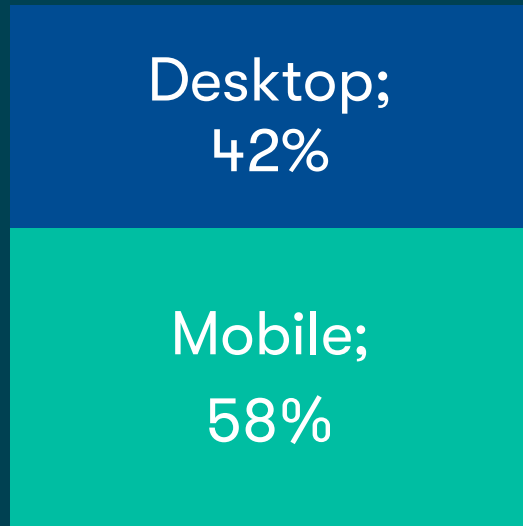


→ NEW ON RADAR

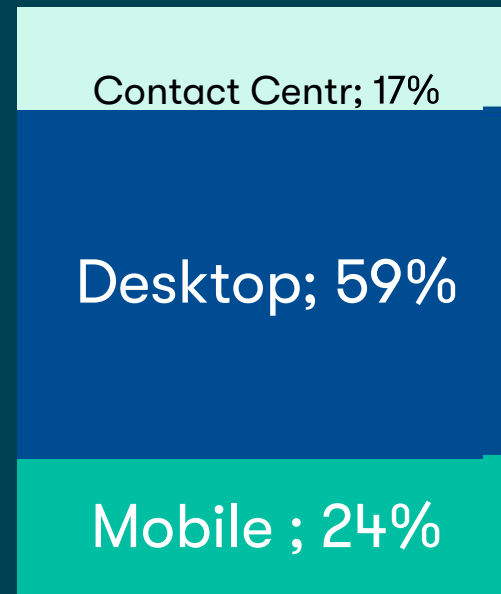
- Voice chatbots
- Onboard e-showrooms
- VR (AR)
- Humanoid robotics (Pepper)
- Robotic bar tenderers
- ...



ONLINE CHANNELS. B2C SEGMENT



INFO SEARCH



TICKET PURCHASES



STRATEGIC AMBITION IN DIGITAL CX

We are **globally** among the **travel**
transportation industry **leaders** in
digital user experience



BEFORE THE TRIP

2w before the trip

5d before the trip

STAGE

REALISE

DETERMINE

BOOK

ADD OTHER TRAVELERS

PAY

INVITE FRIENDS

GO TO MOBILE APP

REMIND

EDIT RESERVATION

PAY

THOUGHTS & FEELINGS

"Wow, I have collected so many points - some are expiring soon!"

"It is always better to travel during the week with the kids"

"I will book a cruise to Stockholm now"

"I will add my partner so that he will also collect the points"

"Confirm and pay with one click!"

"I can get 50 points if I invite a friend....would be wonderful if my friend Liva would join with her Kids"

"Oh... oh my trip is now also on my mobile app! Convenient"

"Visit Junibacken now 50% discount... exactly what I was looking for"

"Quite handy I can add these visits to my trip"

"I will pay later"

ACTIONS



Receive email
Check points balance and expiration date
Open Offers for ClubOne points
Open TallinkSilja.fi

Select dates available with ClubOne points
Check availability for luxury cabins

Select luxury cabin with Breakfast included
Select Kids Meal Packages

Add family members

Confirm
Pay
Receive email confirmation

Future opportunity:
Share on social media and collect points
Create a Wishlist with friends and/or family members and collect points

Receive notification
Open the app

Receive sales email reminder
Read about onshore service
Read about dinners & shows onboard

Buy tickets for Junibacken
Check what to do in Stockholm
Check harbour information

Confirm

Receive Duty Free offers
Read about cabin upgrade

Future opportunity:
Edit reservation directly on the app

DEVICES

Desktop

Desktop

Desktop

Desktop

Desktop

Desktop


App

Desktop

Desktop

Desktop

KRYSSNING HELSINGFORS



1 SAMMANFATTNING BEKRÄFTELSE →

Kryssning Helsingfors

Utresa Fartyg
16 Okt, Tis 2018 Silja Symphony

Stockholm tis 16/10 Helsingfors ons 17/10 Stockholm tor 18/10

16.45 10.30 17.00 09.45

+ LÄGG TILL I KALENDER

ÄNDRA DIN BOKNING

Kontaktperson Passagerare
 Uoeuaxbw 2 × Vuxna
 Qkbvuykdir 0 × Minderåriga
 1 × Hytt

2 INCHECKNING

Incheckningen i terminalen öppnar 16.10. och stänger 16.15


Värtahamnen
 Hamnpiersvägen 10, Stockholm →

3 UTRESA

16 Okt, Tis 2018 Ombordstigningen stängs 16.25

Stockholm tis 16/10 Helsingfors ons 17/10

DAY IN STOCKHOLM CRUISE



1 1/2 PASSENGER INFO MISSING →

1 SUMMARY CONFIRMATION →

Day in Stockholm cruise

Departure on Ship
26 Oct, Fri 2018 Baltic Queen

Tallinn Fri 26/10 Stockholm Sat 27/10 Tallinn Sun 28/10

10:00 10:15 17:30 10:15

+ ADD TO CALENDAR

CHANGE BOOKING

Contact person Passengers
 Bwcmhvkz 2 × Adults
 Rvbjeweo 0 × Underages
 1 × Cabin

2 CHECK-IN

Terminal check-in is available 26.10. and ends at 17:30


D-Terminal
 Lootal 13, Tallinn →

3 OUTWARD TRIP

26 Oct, Fri 2018 Boarding ends 17:40

Tallinn Stockholm

HEL - TAL - HEL



1 YHTEENVETO VARAUSVAHVISTUS →

Meno-paluumatka Tallinnaan

Lähtö Paluu
16 Loka, Ti 2018 **17** Loka, Ke 2018

Laiva Laiva
 Megastar Megastar

Helsinki Tallinna Helsinki
 16/10 16/10 17/10 17/10

16.30 18.30 19.30 21.30

+ LISÄÄ KALENTERIIN

MUUTA VARAUSTA

Yhteyshenkilö Matkustaja
 Argo Ohvril 1 × Aikuinen
 0 × Alaikäiset

2 LÄHTÖSELVITYS

Terminaalin lähtöselvitys ei ole vielä auki
 Lähtöselvitys aukeaa 15.10. klo 16.30

Länsiterminaali 2
 Tyynmerenkatu 14, Helsinki →

3 MENOMATKA

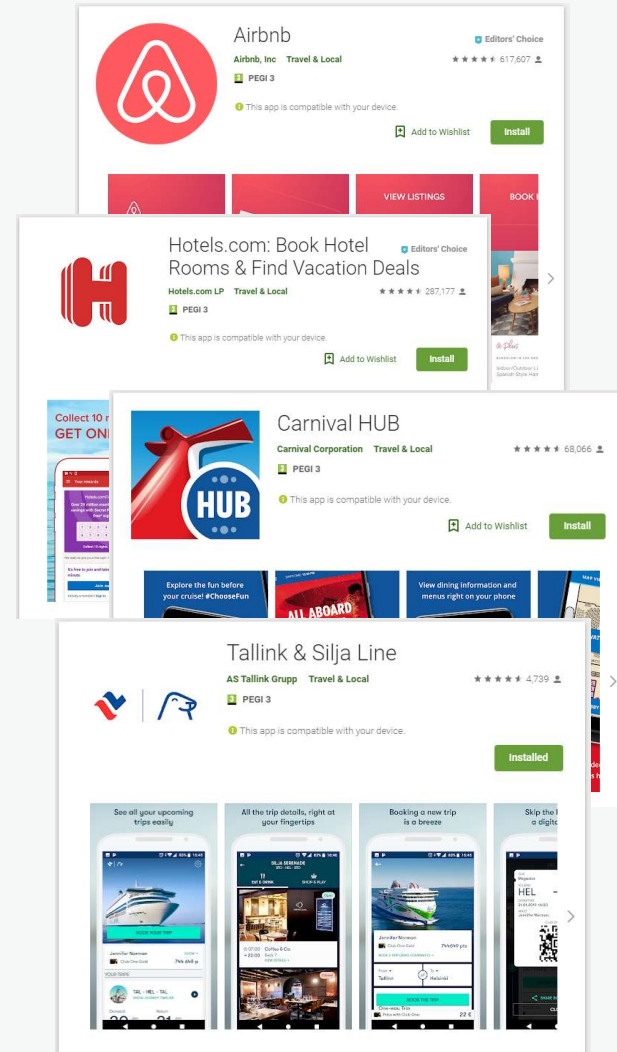
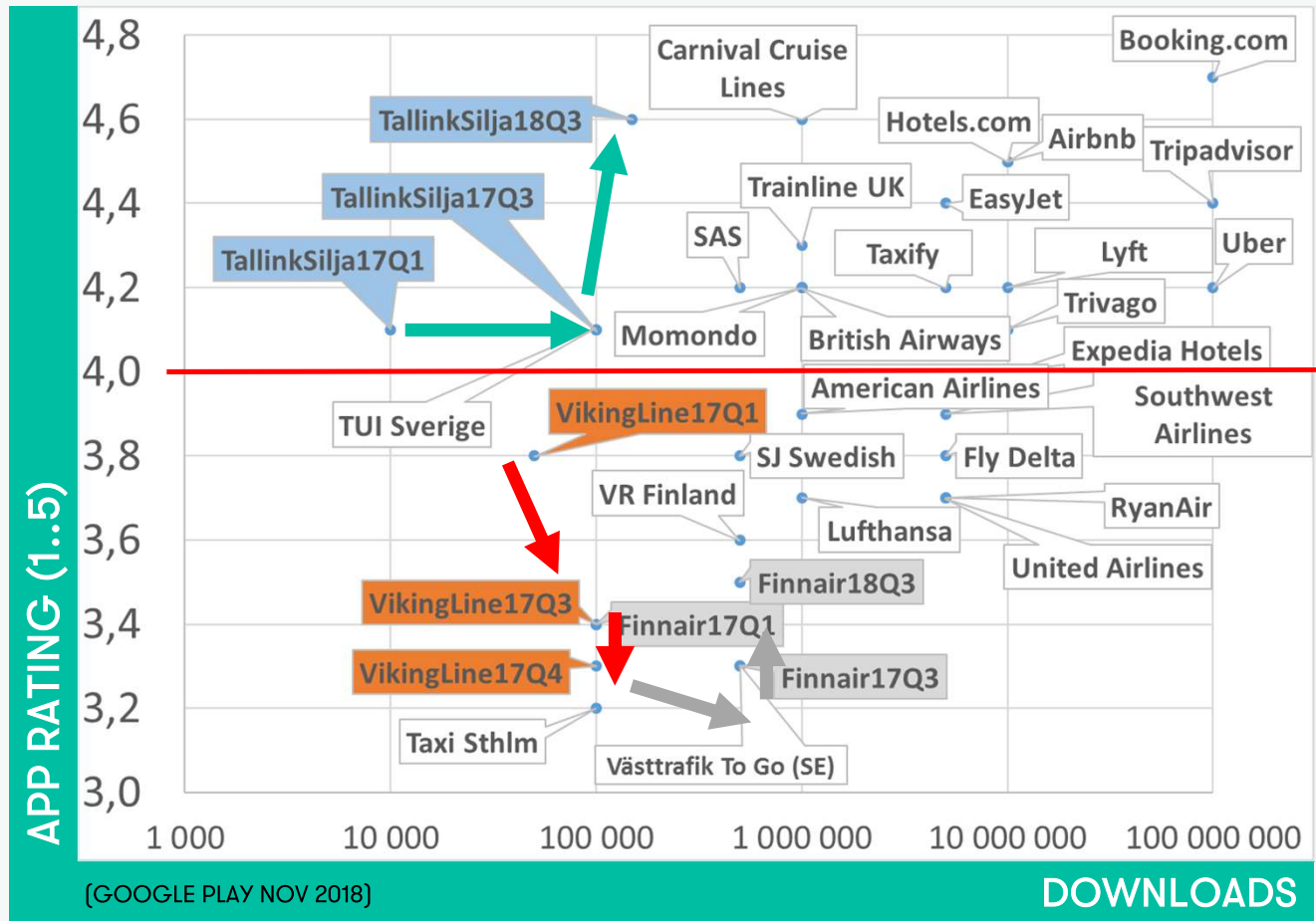
16 Loka, Ti 2018 Laivaannousu päättyy 16.10

Helsinki Tallinna
 ti 16/10 ti 16/10

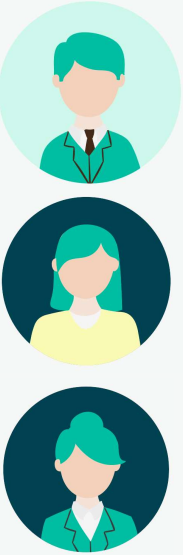


**CONTEXTUAL
MOBILE APP**

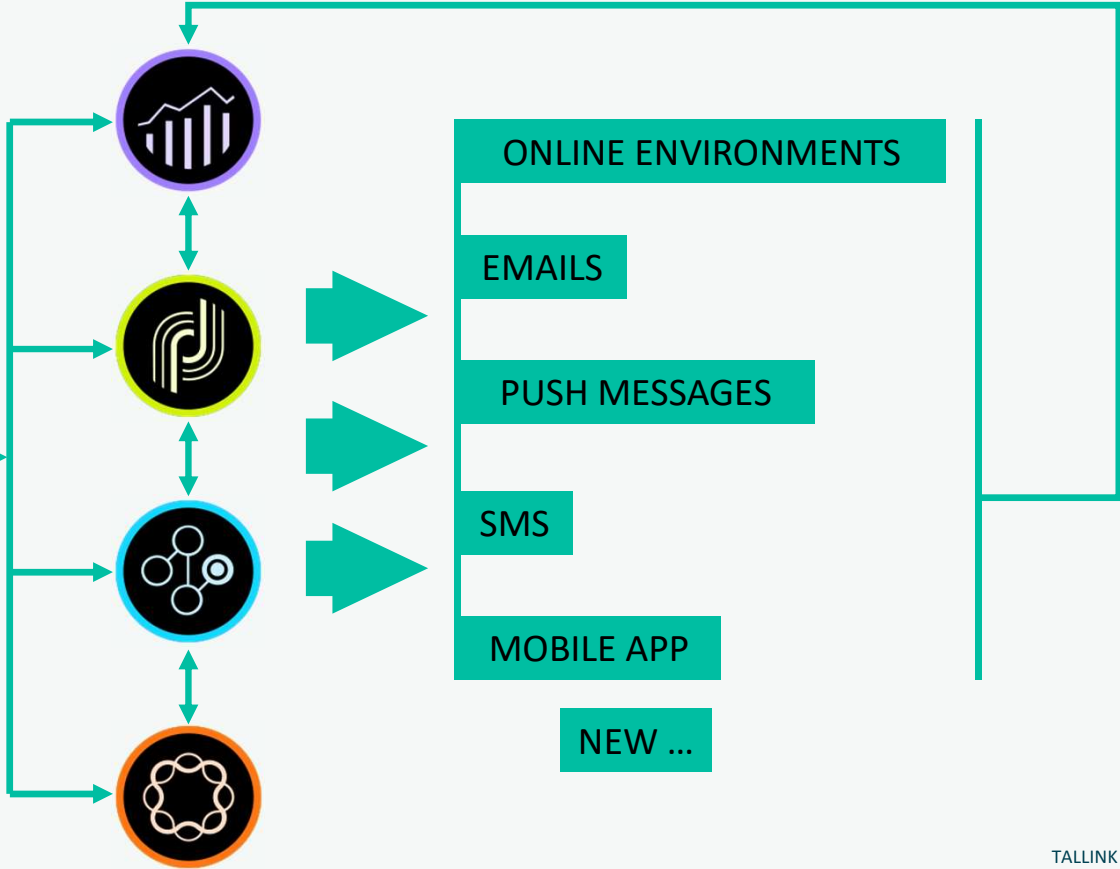
GLOBAL APP RATING BENCHMARK



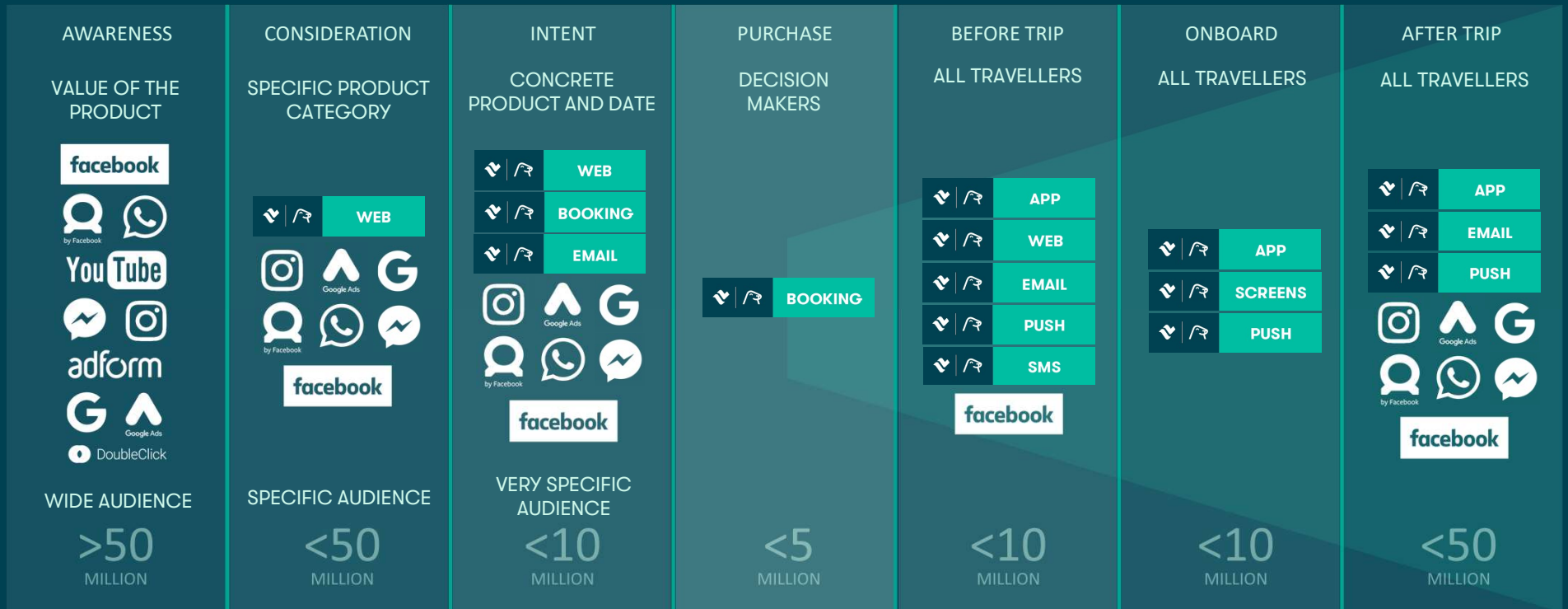
CROSS- & UPSELL AUTOMATION



CUSTOMER 360 VIEW
PERSONALISATION
(ML & AI)



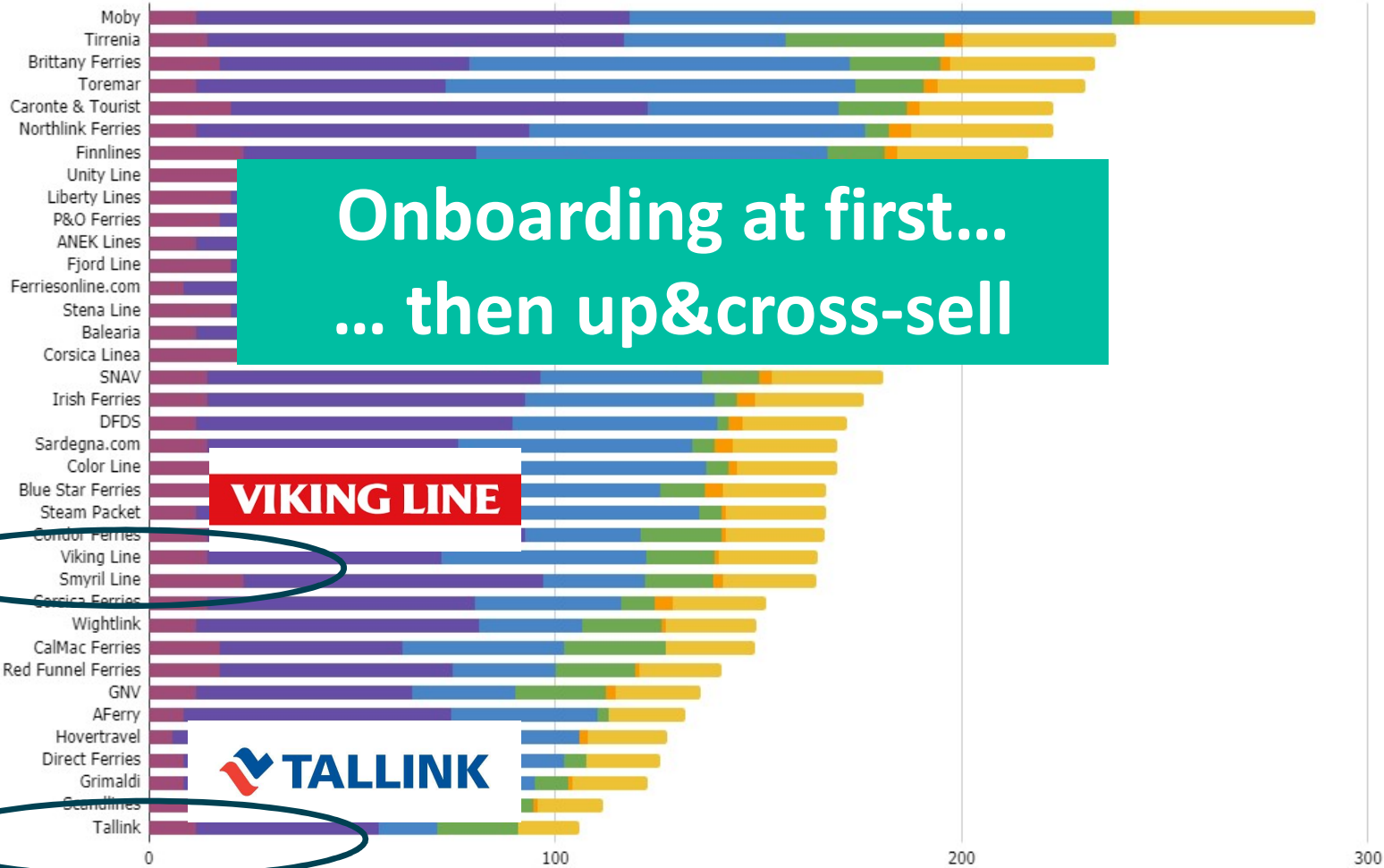
MAPPED DIGITAL JOURNEY CHANNELS



Time Taken To Complete Ferry Booking Forms (Seconds)

www.formisimo.com 2018

■ Page Load Time
 ■ Text Box Time
 ■ Drop Down Time
 ■ Radio Button Time
 ■ Tick Box Time
 ■ Time Between Fields

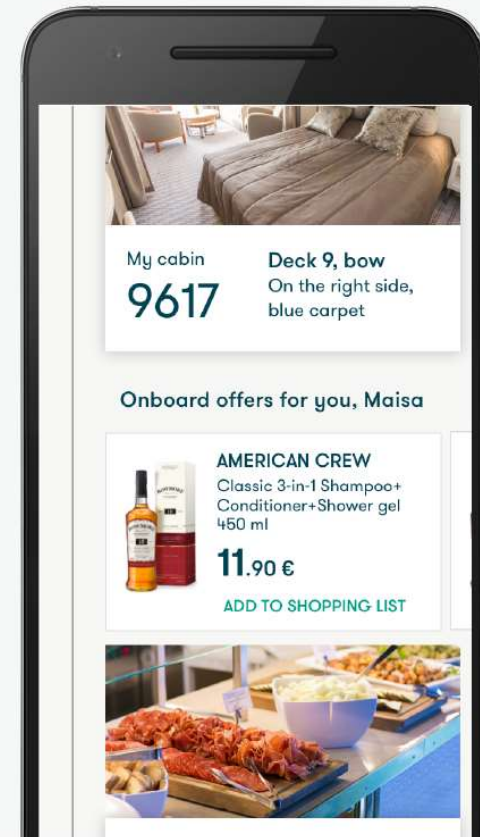
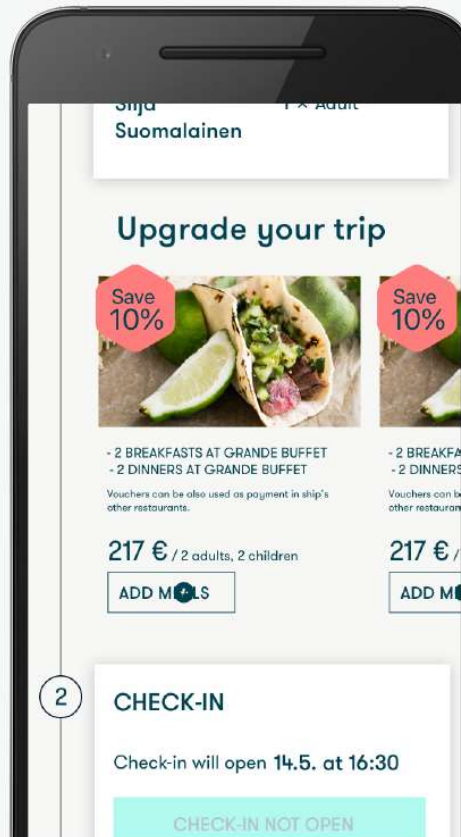
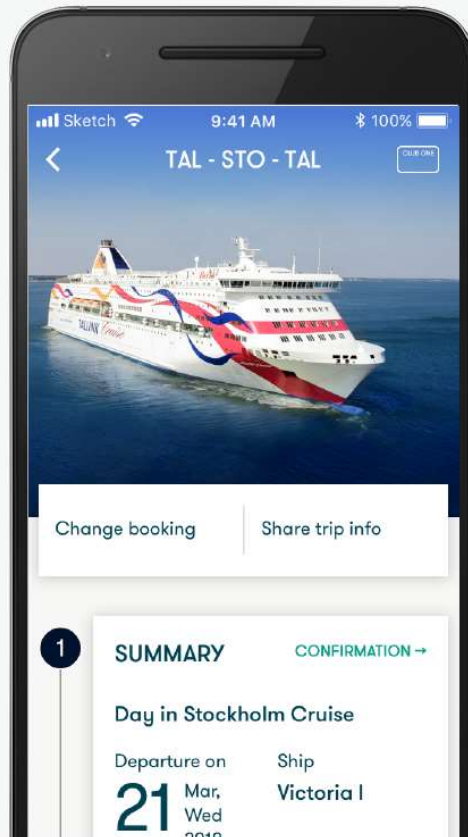


Onboarding at first...
... then up&cross-sell

VIKING LINE

TALLINK

Up&cross-sell onboard



HASSLE FREE PAYMENTS DEVELOPMENT

- Advancing the customers needs (mobile wallets, Asian payments, wearables, biometry, ...)
- Convenience (one click payments, automated refunding, ...)
- Customer 360 view and CRM integrations (incl. onboard retail)
- Tallink own loyalty/payments services development (Club One card, „ship money“, Tallink Credit Card, ...)
- Support for new services (eg onboard e-showrooms, ...)
- Investigate into new market regulation opportunities (PSD2)

THANK YOU!

LAURI LÄHEB
GROUP BUSINESS DEVELOPMENT & OPERATIONS

