

An aerial photograph showing a vast expanse of white clouds below, with a bright sun setting on the right side, casting a golden glow across the sky. The sky transitions from a deep blue at the top to a bright yellow near the horizon. A large, semi-transparent blue circle is visible on the right side of the image.

Discover Airlines in Lapland

From economic results to ecological responsibility

October 2025
Olostunturi, Muonio, Finland

1 . Economic perspective

The past seasons of our service from Frankfurt to Kittilä: Strong winter demand, summer yet to reach its potential



WINTER

STEADY GROWTH

- Lufthansa Group's winter link to Kittilä started years ago from Munich, Vienna & Zurich

HIGH DEMAND

- Since then, high volumes have underlined that Lapland is a reliable winter destination

OVERALL SEAT OFFER BY AIR

EU to Kittilä (Domestic flights excluded)



TRUSTED DESTINATION

- A strong value chain ensures Kittilä's reputation as a premium Arctic escape

LIMITATIONS AHEAD

- Winter traffic already strains infrastructure

SUMMER

NEW SERVICE LAUNCHED 2025

- First summer service from Central Europe to Kittilä was launched by Lufthansa Group

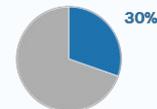
GOOD PRODUCT APPEAL

- Midnight sun, lakes, hiking & sauna form a strong concept for **SUMMER WELLBEING**

BUSINESS CASE AMBITION

- The direct offer was expected to further boost the Central European markets, but could not fulfill ambitions

BUSINESS CASE
Target vs. Actual



KEY CHALLENGE

- Hotel rates have eased compared to winter, but are still not competitive enough to unlock demand



Images: Pixabay (free for commercial use)

From lessons learned to next moves: Towards a stronger year-round setup

MARKET INSIGHTS

WHERE ARE OUR GUESTS COMING FROM?

- Most of our guests want to visit Finland, only 4% of them are Fins travelling abroad
- With a share of 10% in summer, Fins travel much more compared to 1% in winter
- Top markets are Germany, Switzerland, Greece & Belgium
- One third of our guests are travelling between Germany & Finland, two thirds have connecting flights, making pricing more difficult

DOES SEASONALITY MATCH OUR EXPECTATIONS?

- A winter month is still more than 5 times stronger than a summer month:



ADJUSTMENTS FOR 2026

WHAT ARE OUR LEARNINGS?

- When summer expectations 2025 were not met, we mitigated the financial risk by:
 - Combining Kittilä with other Nordic destinations (triangular flights)
 - Adjusting capacity to lower demand in shoulder season
- We nevertheless incurred significant financial losses

FURTHER CUT-BACKS IN SUMMER 2026:

- One instead of two weekly flights, combined with another Nordic destination
- No service during shoulder season

WHAT IS MISSING?

- Success requires a clear summer product strategy aligned across the value chain

➔ We are ready to invest in **SUSTAINABLE GROWTH** as part of a balanced **YEAR-ROUND SETUP**

STRATEGIC APPROACH

WHY INVEST IN ECONOMIC SUSTAINABILITY?

- A balanced setup secures stable jobs and makes investments in housing and infrastructure worthwhile all year

WHAT DOES IT TAKE?

- An attractive & competitive offer that draws guests north instead of to the Mediterranean – and from established Nordic hubs further into Lapland

WHO NEEDS TO ACT?

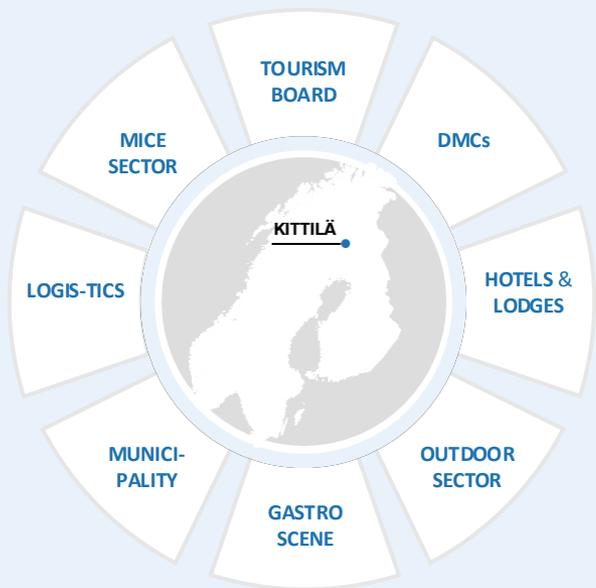
- The full value chain must commit to a shared ambition, hotels adjusting rates is the first step

HOW TO POSITION THE PRODUCT?

- Build a cross-regional Arctic cooperation to increase visibility for both products: **WINTER EXPERIENCE** and **SUMMER WELLBEING**
- Highlight each region's unique strengths

Unlocking long-term potential: Value chain alignment as the key to year-round success

VALUE CHAIN



BALANCED SEASONS – SUSTAINABLE GROWTH

“STABLE JOBS AND LONG-TERM INVESTMENTS ONLY PAY OFF IF DEMAND RUNS YEAR-ROUND”

“HOTELS AND THE FULL VALUE CHAIN MUST CREATE COMPETITIVE OFFERS FOR BOTH SEASONS TO PROFIT OF A SUSTAINABLE PRODUCT”



What makes it work...

- Early alignment between airline and tour operator planning
- Committed tourism board as coordinating lead at destination level
- Reliable flight offer for at least two seasons
- Sufficient hotel capacity at market conditions
- Strong and accessible infrastructure for international guests (transport, handling, services)
- Clear willingness from all local partners to support the project
- Joint sales and marketing concept with shared responsibilities and timelines
- Transparent communication and long-term commitment across all partners in the value chain

Magical Lapland: eight seasons of nature, lifestyle and mindful experiences

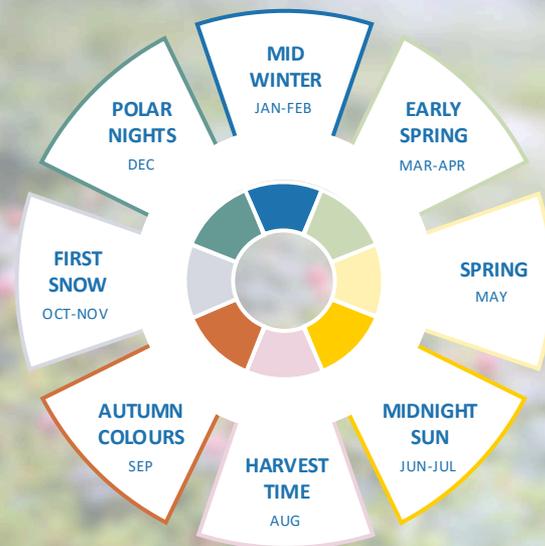
FROM POLAR NIGHTS TO MIDNIGHT SUN:

“EVERY SEASON BRINGS
UNIQUE EXPERIENCES
- A FOUNDATION FOR YEAR-
ROUND TOURISM GROWTH”

**We turn seasonal contrasts into
year-round opportunities**



THE 8 SEASONS OF LAPLAND



**LAPLAND'S EIGHT SEASONS OFFER A UNIQUE RHYTHM
OF NATURE AND CULTURE**

WINTER

Polar nights, Northern Lights, deep snow adventures

SPRING

Melting landscapes, awakening nature, early outdoor season

SUMMER

Midnight sun, lakes, hiking and sauna

AUTUMN

Harvest season, mushrooms & berries, vibrant forest colours

Images: Pixabay (free for commercial use)

2 . A sustainable future

Sustainability at Discover Airlines: testing new solutions for old problems – from day one.

COMMUNICATION



MEASURING & REPORTING

As an EMAS certified company, we constantly measure our environmental impact, analyze it and optimize measures to reach our targets. A detailed report on this is published annually*.

In four years, we have had quite some milestones:

- ✓ Reduced single use items made from plastic on board
- ✓ Introduced pre-loved uniforms for all crew
- ✓ Reduced paper consumption in the office
- ✓ Implemented a semi-automated environmental management system to keep track of KPIs
- ✓ Funded the construction of a soup kitchen in Namibia
- ✓ Introduced mandatory sustainability training for crew members
- ✓ Launched sustainable products for the touristic market, both B2B and B2C

But this is just the beginning, we have **over 80 measures in place to reduce our environmental impact**. And we need strong partners like you to make them work.

*available in german at "Unser Unternehmen | Discover Airlines"

Emission management: reducing what we can, offsetting what we can't.

EFFICIENCY



Per passenger fuel consumption decreased by more than 50% percent since the 1990s¹, mainly from technological improvements. Regardless of how the aircraft of the future is powered, efficient operations are key for a sustainable future.

Main challenges: slow fleet rollover, data availability, cultural changes

CARBON OFFSETS



From planting trees to Direct Air Capture, carbon offsets have evolved to an affordable, established, though controversial solution to balance carbon emissions.

Main challenges: reliability, public acceptance

SUSTAINABLE AVIATION FUEL (SAF)



SAF is 2-6 times more expensive than regular jet fuel, depending on the source, and current quantities would cover less than 1% of the global need². Supply needs to be managed responsibly to maintain a sustainable product.

Main challenges: availability, costs

¹ [Global aviation demand, energy efficiency and CO₂ emissions, 1990 to 2021](#)

² [Airlines Face Growing SAF Costs Despite Cheaper Fuel](#)

Together for the future of tourism: Making arctic Lapland a lighthouse for sustainable travel

OBSERVATION



There is major potential in promoting more sustainable travel options, such as carbon offsets or SAF. Today, both are available to our guests, but conversion rates are low. From our customer surveys we know:

- Carbon Offsets are cheaper and used more frequently, but **SAF is considered more trustworthy**
- **Guests prefer package deals** that offer more than just a green benefit
- Take rates for **Green Fares for Nordics are above average**

PROPOSAL



Reducing emissions

Using sustainable aviation fuel from current stocks (e.g. biogenic waste) reduces total emissions by >80%, compared to regular jet fuel.



Engaging a target audience

Studies indicate that sports/ outdoor enthusiasts have an above average interest in sustainability. They are also a key target group for the region.



Sharing costs

A roundtrip on 100% SAF* would cost additional 95 EUR in Economy Class, too much for many travelers – unless we incentivize it.



Together, we could create an **affordable, attractive offer for our guests** in a first ever destinations partnership, while also **promoting Lapland as a one-of-a-kind sustainable travel destination** for nature lovers and outdoor fans.



*For logistic reasons SAF cannot be allocated to a specific aircraft, but must be added centrally, this has no influence on the ecological benefits

The journey to a sustainable future is a long-distance flight...

...time consuming.

...maybe uncomfortable.

...sometimes bumpy.

...but the destination is worth it.

