

VALUE PROPOSITIONS AND CONCEPTS FOR PÄRNU COUNTY TOURISM ATTRACTION



EXECUTIVE SUMMARY

Pärnu County is one of Estonia's most recognized tourism regions, anchored by the city of Pärnu and its long-standing reputation as the "Summer Capital of Estonia", with a tradition rooted in spa culture, seaside leisure, and cultural events. However, the region's tourism economy remains heavily seasonal, creating challenges for year-round employment, business viability, and infrastructure utilization.

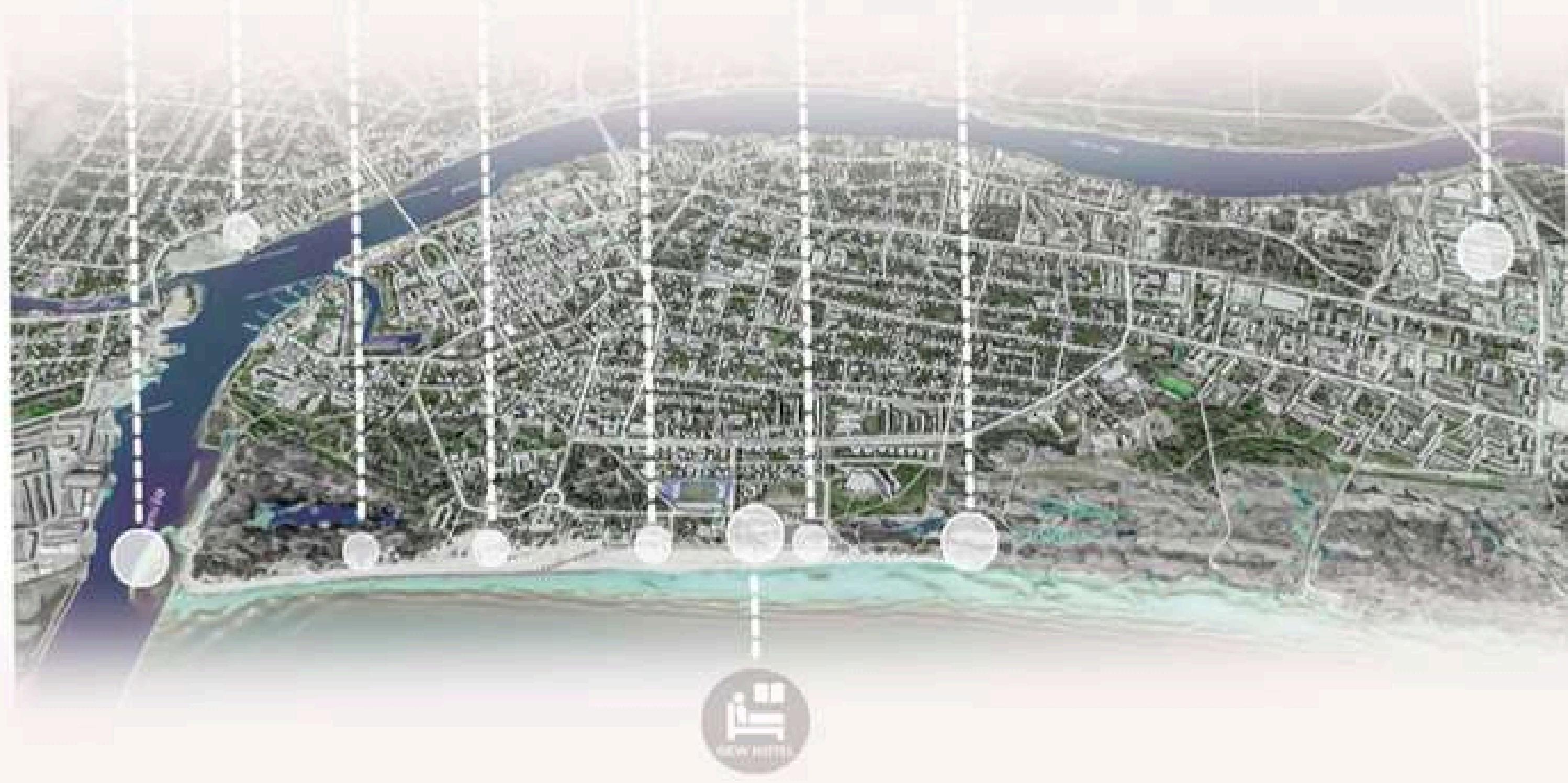
Recognizing the need to address this seasonality and support more sustainable growth, this study was commissioned to explore the feasibility of developing a year-round tourist attraction hub in Pärnu. The objective is to define concept options that not only increase off-season appeal and diversify the visitor base, but also reflect the region's identity, support regional development goals, and align with environmental and accessibility values.

This report builds on previous strategic work, including the Pärnu Tourist Destination Strategy 2025–2029 and regional development plans. It integrates insights from benchmarking, stakeholder input, infrastructure analysis, and sustainability frameworks to deliver three potential concepts:

1. Pärnu Beach Hall – Eternal Summer by the Sea
2. Pärnu FlowPark – The Adaptive Arena of Culture, Sports & Events
3. Pärnu PlayScape – Modular Destination District

Each concept includes an assessment of location, market potential, sustainability, and risks. Together, they form a foundation for decision-making and further investment planning to support Pärnu's future as a resilient, inclusive, and inspiring year-round destination.

For each of the three concepts – FlowPark, PlayScape, and Beach Hall – three alternative names and accompanying presentation texts have been developed. Each includes a descriptive concept summary, a tagline proposal, and a concise pitch statement tailored for strategic and promotional use.



METHODOLOGY AND RESOURCES

The concept proposal was developed using a blend of qualitative and quantitative methods, desk research, benchmarking, and co-creative expert work. The goal was to align the concept with Pärnu's tourism ecosystem realities and broader Baltic Sea region visitor trends.

The foundational document for this work is the Pärnu Tourism Study – Interim Report, Market analysis, which integrates findings and data from several key methodological steps:

- Stakeholder Consultations & Regional Strategy Review: Inputs from the Pärnu Tourist Destination Strategy 2025–2029, regional development plans, and feedback from local tourism, culture, infrastructure, and urban planning actors.
- Data Analysis & Market Overview: Utilized statistical data (e.g., Eesti Pank, Statistics Estonia, Eurostat, GlobalData) on visitor flows, seasonality, and outbound travel to identify key source markets and evolving visitor needs.
- International Benchmarking: Reviewed over 40 case examples of year-round tourism infrastructure (e.g., waterparks, event arenas, wellness centers) in Northern and Central Europe, drawing from operator websites, public reports, fieldwork, and expert interviews.
- Sustainability & Accessibility Evaluation: Assessed environmental and social impacts of tourism infrastructure, considering climate goals, accessibility, and inclusive service design.
- Market and Visitor Insight Analysis: Focused on market segments from Finland, Germany, Sweden, Latvia, Poland, and Estonia, building profiles from national surveys, international trend reports, and tourism board data.
- Travel Trend Monitoring: Incorporated global trend reports (e.g., ETC, GWI, Globetrender, Visit Finland/Visit Estonia) on wellness, sustainability, digitalization, and experience-driven tourism.
- Benchmarking of International Year-Round Attractions: Analyzed comparative case studies (e.g., Hype Areena, Sandcastle Waterpark, Tatralandia) to identify best practices in seasonality management, concept design, infrastructure integration, and economic models.
- Connectivity Development Report: Examined Pärnu's future accessibility, specifically focusing on Rail Baltica, Via Baltica, and multi-modal mobility, emphasizing infrastructure's role in new tourism concepts and the need for integrated transport.

All these elements were synthesized into the Pärnu Tourism Study – Interim Report, Market analysis, serving as the strategic and analytical basis for further concept refinement.

PROJECT TEAM

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Senior tourism strategist with 25+ years of experience in destination development, experience design, and international tourism policy. Leads the project with a data-driven and visitor-centric approach. Kristian has worked across Finland and Europe on projects involving strategy, product development, and ecosystem coordination.

Miikka Raulo - Strategy Partner, FlowHouse Oy

Expert in municipal strategy, digital tourism marketing, and service design. Brings analytical insight and strategic tools for business development and tourism growth.

Specialist Consultants

Susanna Harvio - Managing Director, Alusta Consulting

Specialist in sustainable tourism, regional development, and impact assessment. Brings expertise in socio-economic analysis, participatory planning, and facilitating transitions towards sustainability.

Henna Iinsalo - Partner, Architect & Planner, Harris-Kjisik

Urban planner and architect with experience in recreational and tourism masterplanning in ecologically sensitive areas. Provides insight into spatial development, zoning, and long-term land use feasibility.

Timo Rissanen - Transport and Mobility Specialist, Port Experience

Expert in air and sea connectivity with 20+ years in aviation and multimodal logistics. Focuses on developing the accessibility layer of the concept, including airport, cruise port, and ground connections.



PÄRNU TOURISM STUDY – INTERIM REPORT, MARKET ANALYSIS

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- B. List of potential benchmarking sites
- C. Summary of 3rd June Workshop
- D. 3rd June Workshop materials
- E. Benchmarking case summaries

Pärnu – Connectivity Development

Flowhouse value proposition – Transport

2025

Content

1. Air Connectivity

- Pärnu Airport and Pärnu Region for air travel
- Forecast for passenger growth
- Economic impact
- Recommended actions

2. Road & Rail Connectivity

- Current land connectivity as tourism driver
- Future - Rail Baltica
- Recommended actions

3. Cruise Connectivity

- Cruise market outlook
- Port of Pärnu and destination readiness
- Cruise line positioning for Pärnu region
- Economic impact
- Recommended actions

4. Summary & Conclusions

- Connectivity requirements for key development concepts
- Conclusion & Key findings

PORT
EXPERIENCE

Phase	Content	Timeframe	Key Deliverables / Milestones
1. Kick-Off and Orientation	Kick-off meeting with Contracting Authority, alignment on scope, goals, and communication methods	Week 1	Kick-off meeting held, shared project plan approved
2. Baseline Review and Insight Gathering	Review of existing materials, stakeholder interviews, identification of success criteria, benchmarking comparable attractions	Weeks 2–3	Summary memo of insights, draft outline of value proposition structure
3. Stakeholder Engagement & Co-Creation	Targeted stakeholder workshops and/or interviews to validate opportunities, gather local/regional perspectives, and co-develop attraction themes and focus areas	Weeks 4–5	Workshop results summary, confirmation of concept directions
4. Value Proposition Development	Defining the proposed tourism attraction's core concept, uniqueness, and strategic fit; preparing investor-oriented framing	Weeks 6–7	Draft value proposition (investor and destination lens), working version of concept material
5. Economic and Operational Feasibility	Exploration of possible business and operational models, partner roles, estimated investment levels, potential revenue logic	Weeks 8–9	Preliminary feasibility analysis, model recommendations
6. Finalization and Presentation	Completion of the final deliverables: refined value proposition, visual material, recommendations for next steps and investment communication	Weeks 10–11	Final report and presentation delivered to Contracting Authority



1

Indoor Beaches

Indoor beach destinations recreate the seaside atmosphere and activities — indoors and year-round. These venues typically feature:

- Real sand, palm trees, warm temperatures
- Beach games, sports courts (e.g. beach volleyball), and wellness areas
- Event hosting in a relaxed, summer-like setting
- Food, drinks, and music to support an immersive, social experience

They offer weather-proof recreation and combine leisure, fitness, and events in a flexible format suitable for all seasons.

Why Are Indoor Beaches Relevant for Pärnu?

- Strengthen the “Summer Capital” brand beyond the summer season
- Enable year-round use of beach-themed experiences in harsh climate
- Flexibility for families, groups, wellness and events
- Blend easily with Pärnu’s existing tourism identity and infrastructure



2

Multifunctional Event Arenas

Multifunctional arenas are versatile venues designed to host a wide range of activities, such as:

- Concerts, sports, cultural events, exhibitions
- Business meetings, conferences and trade shows
- Recreational and community events

These arenas are often scalable and equipped with flexible seating, lighting, acoustics, and staging—allowing them to adapt to seasonal demand and diverse audiences. Many also include adjacent leisure and hospitality services.

Why Are Arenas Relevant for Pärnu?

- Provide a year-round venue for events and activities regardless of weather
- Complement summer tourism with off-season conferences, exhibitions, and entertainment
- Strengthen Pärnu’s potential as a regional events and meetings hub (Rail Baltica, hotel base)
- Enable community use, sports, and culture in an integrated destination concept



3

Ecosystem of Attractions

An ecosystem of attractions refers to a cluster of interlinked experiences—such as activities, restaurants, retail, events, and accommodations—that create a comprehensive and modular destination. Rather than a single attraction, the strength lies in the integration of complementary services, offering something for different visitor segments and visit durations. The model supports:

- Year-round appeal
- Repeat visitation
- Efficient use of infrastructure and marketing

Why Are Ecosystems Relevant for Pärnu?

- Build on existing infrastructure and beach appeal
- Enable phased development rather than single large investment
- Allow for targeted services for families, wellness seekers, event-goers
- Support year-round economy through cross-selling and bundled experiences
- Flexible model for public-private collaboration

STRATEGIC CONTEXT: PÄRNU AS A DESTINATION

Pärnu holds a unique position in Estonia's tourism landscape. Known widely as the "Summer Capital of Estonia," the city has cultivated a strong identity based on its coastal charm, wellness heritage, and vibrant seasonal culture. Visitors are drawn to Pärnu's sandy beaches, historic spa traditions, diverse events, and relaxed atmosphere—elements that have shaped the town's appeal for over a century.

While this seasonal magnetism has successfully positioned Pärnu in the domestic and nearby international markets (notably Finland and Latvia), it has also led to structural seasonality. A majority of tourism activity is concentrated between May and September, with a sharp decline in the winter and shoulder months. This affects the viability of year-round businesses, limits employment stability, and underutilizes infrastructure outside peak season.

Despite these limitations, Pärnu has several strategic advantages that create strong potential for year-round tourism development:

- High awareness and emotional attachment in the domestic market, and growing interest from neighboring countries such as Germany, Sweden, and Poland
- Rich natural and cultural assets, including Soomaa National Park, riverfront areas, local heritage, and wellness traditions
- A compact, walkable urban environment that supports destination integration and visitor flow
- Ongoing infrastructure improvements, including the development of Rail Baltica, port and cruise terminal upgrades, and sustainable mobility solutions
- Strong alignment with Estonia's national tourism goals, including climate-conscious development, digital integration, and regional revitalization

Pärnu's tourism strategy for 2025–2029 places clear emphasis on extending the season, activating new visitor segments, and developing products that balance quality, sustainability, and regional identity. This study contributes directly to those strategic aims by defining new attraction concepts that can anchor off-season visitation, create year-round economic impact, and position Pärnu as a destination for not only summer relaxation, but also wellness, events, creativity, and cultural depth throughout the year.

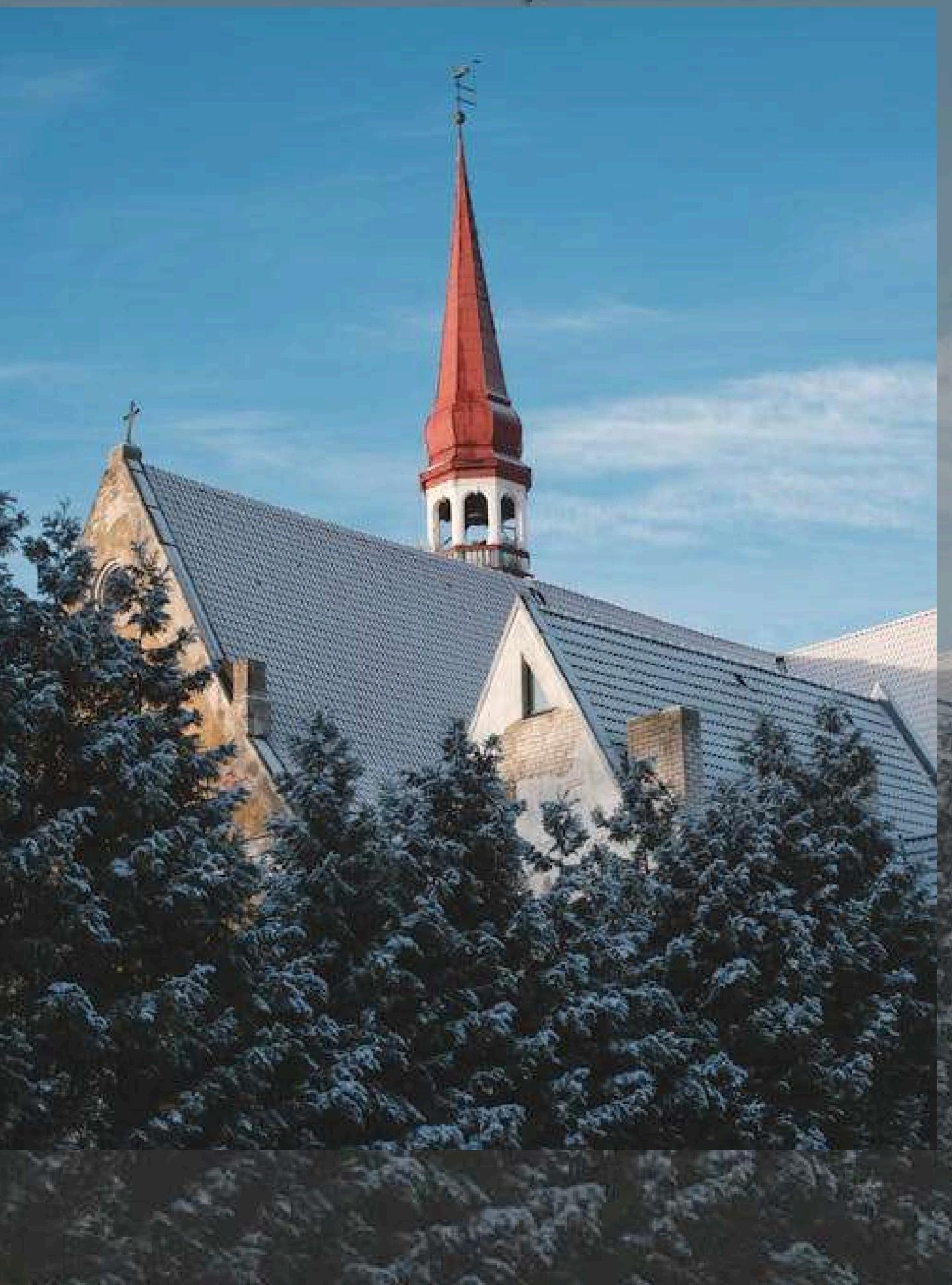
5. KEY OBSERVATIONS FOR CONCEPT DEVELOPMENT

Identity and “Spirit of Place”

Pärnu's true competitive edge lies in its atmosphere — a unique blend of calm rhythm, tactile spaces, and emotional familiarity. This “spirit of place” must be preserved and amplified through any new development.

Opportunities include:

- Designing around transformation: Pärnu changes with the seasons — from summer vibrancy to winter stillness. Concepts should embrace this rhythm instead of fighting it.
- Interpreting heritage in fresh ways: Spa culture, beach nostalgia, and even industrial or maritime heritage can become platforms for immersive storytelling and edutainment.
- Blending low-pressure luxury with experience design: Pärnu doesn't need to be loud or large — it needs to be meaningful. Smart, sensorial, and modular experiences are more aligned with the town's identity than large-scale themed entertainment.



5. KEY OBSERVATIONS FOR CONCEPT DEVELOPMENT

The benchmarking, stakeholder input, and trend analysis all point to a clear need and opportunity for a different kind of tourism anchor – one that fits Pärnu’s DNA while answering unmet market expectations.

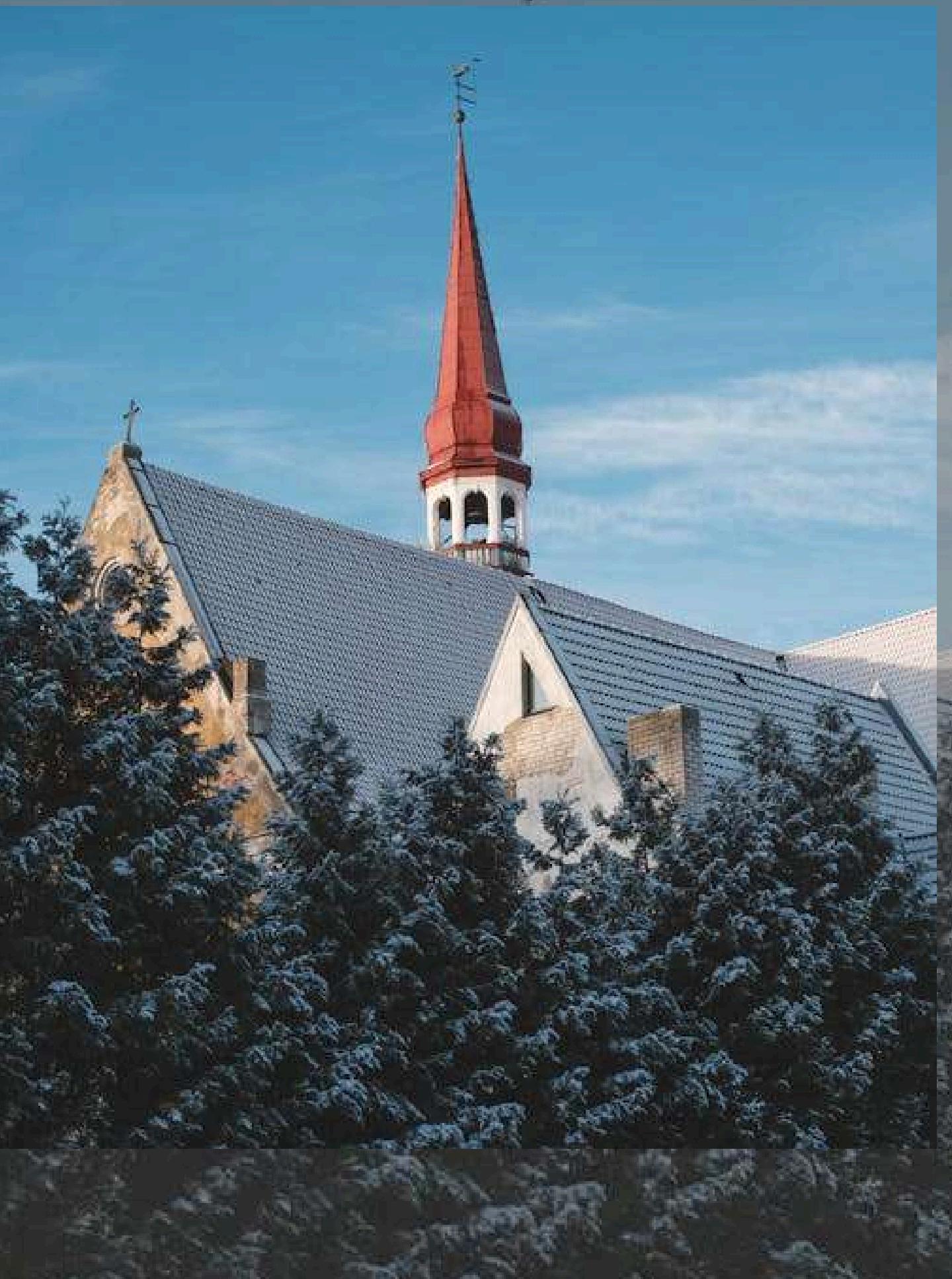
Opportunities to differentiate:

- Create a flagship indoor-outdoor experience that works 365 days a year, balancing calm and activity, relaxation and interactivity.
- Design for emotional relevance – concepts linked to healing, reconnection, nostalgia, or wonder resonate strongly across demographics.
- Bridge heritage and future – using digital tools and storytelling to make history and local culture immersive and appealing.
- Leverage climate advantage – position Pärnu as a safe, comfortable, and accessible destination in summer heatwave years.
- Activate nighttime and seasonal experiences – light, sound, and storytelling could transform shoulder and winter seasons into memorable moments.
- Promote “Baltic Lightness” – a new kind of luxury that is natural, calm, human, and affordable.



5. KEY OBSERVATIONS FOR CONCEPT DEVELOPMENT

- Promote “Baltic Lightness” – a new kind of luxury that is natural, calm, human, and affordable.
The attraction should not try to compete directly with large-scale Nordic theme parks, but rather fill a regional gap for meaningful, medium-scale family, wellness, and cultural recreation – designed with locals and returning visitors in mind, not just one-time tourists.
- Seasonality is structural, not just operational. To overcome it, Pärnu needs a magnetic reason for people to visit in November or March – not just better marketing in July.
- There is no single “target group”. Future success lies in flexible, layered concepts that serve multiple moods and motivations (e.g. active families, romantic escapes, wellness nomads).
- Pärnu is already loved – it needs to be rediscovered. The attraction concept should help Estonians and international guests see familiar landscapes in a new way.
- New mobility infrastructure (Rail Baltica, Via Baltica) opens up positioning as a “pause point” between larger cities – a place for slow moments and meaningful experiences.
- Stakeholders agree that Pärnu should not only copy others but create something rooted in its identity



BENCHMARKING CASES





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TATRALANDIA (SLOVAKIA)

General Concept

Tatralandia is a large-scale year-round water park and wellness resort located in the Liptov region of Slovakia, near the Low Tatras.

The concept combines indoor tropical experiences with outdoor pools (in summer), wellness zones, saunas, lodging, and seasonal activities.

It is positioned as a family-friendly adventure and relaxation destination with multi-day appeal.

Key elements:

- Indoor water park with wave pools, slides, and thermal waters.
- “Tropical Paradise” with palm trees and 30°C temperature year-round.
- Wellness & Spa zone (Celtic Sauna World) with themed experiences.
- Holiday Village Tatralandia with 155 cottages and apartments.
- Close cooperation with the adjacent ski resort (Jasná) and Liptov region attractions

Economic Model

- Ownership: Operated by TMR (Tatry Mountain Resorts), a publicly listed company that owns ski resorts, hotels, and attractions in Central Europe.
- Revenue streams: Entry tickets, spa/wellness treatments, lodging packages, F&B, merchandise, and regional tourism partnerships.
- Package model: Strong integration with ski/winter sports, lodging, and wellness experiences – enables bundling of multi-day stay.



SANDCASTLE WATERPARK (UK)

General Concept

Sandcastle Waterpark is the UK's largest indoor waterpark, located in the seaside resort town of Blackpool. It offers a tropical climate year-round and features over 18 water slides and attractions for all age groups, creating a high-capacity, weather-independent leisure experience.

Key elements:

- Indoor tropical-themed environment with controlled temperature (~28–30°C).
- Mix of thrill slides (e.g. Master Blaster), lazy rivers, wave pools, and toddler splash zones.
- Tiered visitor zones to appeal to both families with small children and teens/adults seeking more excitement.
- Offers accessible facilities and specialized services for visitors with disabilities (awarded for inclusivity).

Economic Model

- Ownership: Operated by Blackpool Council via a wholly-owned company.
- Revenue streams: Entry tickets (time-based + day passes), VIP packages, café/restaurant income, merchandise, group bookings, accessible services.
- Premium "Gold Packages" and private cabana rentals offer higher-margin options.
- Partnerships with hotels, visitor passes, and resort-wide campaigns.



LALANDIA BILLUND (DENMARK)

General concept

Lalandia Billund is a year-round indoor holiday resort centered around Scandinavia's largest indoor water park. It functions as a family destination combining accommodation, leisure, and wellness in one ecosystem.

Key elements:

- Aquadome™: Large tropical indoor waterpark with slides, wave pools, saunas, and kids' areas.
- Holiday homes: Over 800 rental cottages, creating an on-site accommodation ecosystem.
- Indoor plaza: Italian-style streetscape with restaurants, shopping, and activities.
- Additional attractions: Ice skating rink, fitness, bowling, mini-golf, climbing wall, indoor playground.
- Integration with nearby LEGOLAND and Billund Airport.

Economic model

- Privately operated by Parken Sport & Entertainment.
- Revenue streams:
- Accommodation bookings (core business model)
- Waterpark day tickets (external visitors)
- F&B, retail, activity fees
- Year-round package deals
- Efficient cross-selling: guests often stay multiple nights and purchase full access to facilities.



PARTILLE ARENA (SWEDEN)

General concept

Partille Arena is a multi-functional event venue located in the Gothenburg metropolitan area. It combines a mid-sized indoor arena (approx. 5,500 capacity) with sports, concerts, community services, and flexible events programming.

Key elements:

- Arena hall: Concerts, elite handball matches, exhibitions, and large public events.
- Sports center: Additional spaces for public sports and fitness activities.
- Culture and meeting hub: Hosts fairs, dance shows, school events, and lectures.
- Located adjacent to Partille shopping and transport center, acting as a local attractor.

Economic model

- Publicly owned by Partille Municipality.
- Operated with a hybrid model combining:
- Commercial rentals (concerts, exhibitions, large-scale events)
- Community and public use (sports clubs, schools)
- Food & beverage during events
- Focus on economic sustainability and civic value, not just profit.



HYPE AREENA (FINLAND)

General concept

Hype Areena is a digital entertainment and activity center located in Espoo, Finland. It blends physical sports with digital experiences, gaming, e-sports, and immersive technologies. The concept targets active youth, families, and tech-savvy consumers seeking new-generation entertainment.

Key elements:

- Indoor games combining physical action and digital interfaces (e.g. augmented climbing, interactive trampolines).
- Large e-sports arena and VR/XR gaming zones.
- Spaces for events, parties, and school/youth groups.
- Strong integration of Finnish digital innovation and tech industry partnerships.

Economic model

- Ownership: Privately operated concept backed by Finnish tech and experience industry investors.
- Revenue streams: Entry tickets (time-based), e-sports events, F&B, party & group bookings, sponsorships.
- Experience economy: Pay-per-time use and added value through digital services (e.g. performance data, social sharing).





Concept 1:

Pärnu Beach Hall - “Eternal Summer by the Sea”

BEACH HALL

events & wellness

strong narrative

flexible, multi-use

eternal summer



PÄRNU BEACH HALL - GENERAL CONCEPT

The Pärnu Beach Hall is envisioned as a landmark indoor destination that brings the spirit of Estonia's "Summer Capital" to life—365 days a year. Designed as a modular, immersive environment, the concept transforms Pärnu's iconic seaside leisure into a year-round experience that is both playful and restorative. With real sand underfoot, palm-style landscaping, curated ambient lighting, and a consistent +27°C temperature, the Beach Hall replicates the sensory richness of a coastal summer regardless of weather or season.

More than just an indoor beach, the facility functions as a multi-experience hub blending wellness, recreation, culture, education, and gastronomy. Key features include large-scale sunbathing and sports zones, family-friendly lagoons, saunas and spa pools inspired by Pärnu's spa heritage, and a dedicated edutainment dome that highlights local dune ecology and climate themes. A seaside food court, curated to reflect the Baltic coastal palette, supports the overall theme while offering diverse dining experiences.

Importantly, the concept is not a stand-alone venue—it is designed as a core anchor for a broader "beach ecosystem". Its infrastructure can support private events, sports competitions, small festivals, and curated programming in the darker months. In this way, it responds directly to the seasonal imbalance of Pärnu's current tourism landscape and proposes a new rhythm of year-round visitation.

The Beach Hall takes strategic advantage of:

- Pärnu's brand identity as the Summer Capital
- Improved regional accessibility, including Rail Baltica and Via Baltica
- Rising demand for immersive, weather-independent, wellness- and culture-driven experiences
- Growing interest in noctourism and sensory environments, especially during darker seasons

Ultimately, Pärnu Beach Hall offers more than climate-controlled comfort—it embodies a new kind of Baltic resort logic, one where spa tradition meets beach culture, and local identity becomes a repeatable, year-round experience.

KEY THEMED ZONES AND ELEMENTS

Tropical Main Beach Zone

A white sand paradise with loungers, umbrellas, and lush palm-style landscaping. Heated wave pools and shallow lagoons create a safe and sunny retreat for all ages. Relaxing soundscapes and ambient lighting bring the warmth of summer to every season.

Wellness & Spa Bay

A serene wellness zone inspired by Pärnu's historic spa culture. Features include saunas, mineral pools, steam rooms, and modern spa treatments. Quiet corners and slow-paced spaces offer restorative experiences for body and mind.

Adventure & Sports Dunes

An active zone designed for indoor beach volleyball, paddleball, and sand-based fitness. Includes yoga platforms and convertible areas for competitions, beach games, or functional training—all in a climate-controlled environment.

Tropicarium & Edutainment Dome

An immersive learning space featuring interactive exhibits on climate, dune ecology, and Pärnu's beach heritage. Sensory installations and rotating media displays make it ideal for curious families, school groups, and educational programming.

Coastal Food Court & Baltic Street Market

A casual dining area combining local Baltic flavors with tropical-style refreshments. Think seaside cafés, weekend brunches, and cultural food pop-ups that reflect the richness of the region's culinary heritage.

Sunset Event Platform

An atmospheric dome featuring sunset projections, seasonal light art, and sound design. This flexible space transforms into a venue for live music, yoga at dusk, and immersive evening events—perfect for off-season magic.

PÄRNU BEACH H

Eternal Summer by the S

PÄRNU BEACH HALL

Eternal Summer by the Sea



- ★ INDOOR BEACH
- RELAXATION & WELLNESS
- EVENT SPACE
- EDUTAINMENT
- FOOD COURT



ALTERNATIVE CONCEPT NAMES

SunAura Pärnu

SunAura is a wellness-focused indoor oasis that blends tropical aesthetics with Baltic calm. Combining warm sand, sensory light, and spa rituals, it becomes a retreat for mind and body – a modern temple for light therapy, slow living, and conscious leisure.

The Dune Club

The Dune Club is an active-lifestyle indoor beach venue built for fun, movement and social interaction. Think heated sand courts, DJs, food trucks, barefoot workouts, and group events – from sunset yoga to beach cinema.

Tropica Pärnu

Tropica is a lush, immersive micro-resort – a place where Pärnu's summer charm becomes a curated escape into tropical sounds, soft sand, and curated cultural events. With sunset dinners, wellness hammocks, and interactive storytelling zones, it balances nature and narrative.



SEASONAL EVENT PROGRAMMING: CREATING ENERGY BEYOND SUMMER

To make Pärnu Beach Hall a vibrant year-round destination, the venue will host a rotating calendar of immersive, themed, and wellness-focused events—especially during the quieter September–May season. Events are curated to attract families, couples, wellness seekers, and locals, creating new reasons to visit, stay longer, and return throughout the year.

Key Features of the Event Strategy

- Multi-sensory design: Light, sound, warmth, and scent combine for deeply atmospheric experiences.
- Wellness at the core: Guided retreats, meditative nights, and stress relief programs energize the darker months.
- Family-friendly weekends: Child-focused programming brings joy to autumn and winter Saturdays.
- Local partnerships: Events co-created with Pärnu's creatives, chefs, and wellness professionals.
- Repeatable & scalable: Formats adapt to group bookings, midweek activations, and indoor festivals.

Programming Rhythm

- Two events per month keep the energy flowing—alternating between large-scale themes (e.g. “Tropical Light Festival”) and intimate concepts (e.g. “Sunset Sauna Rituals”)



SEASONAL EVENT PROGRAMMING: CREATING ENERGY BEYOND SUMMER

Sample Event Calendar (September–May)

	Event 1	Event 2
September	Baltic Beach Closing Festival – Summer Send-Off	Sauna Stories – Guided spa rituals with local lore
October	Tropical Light Art Week – Glowing beach nights	Autumn Detox Retreat – Sauna, smoothies, silence
November	Nordic-Tropic Film Weekend – Cinema in hammocks	Family Splash Weekend – Kids' beach games & shows
December	Winter Solstice Beach Ritual – Fire & water show	Holiday Market by the Sea – Crafts, glögi & sand art
January	“New Year, New You” Wellness Kickstart	LED Night Swim – Music, visuals, and night pools
February	Valentine Tropic Night – Couples' retreat	Baltic Beats Beach Party – DJs, mocktails & glow
March	Wellness Weekender – Yoga, sound healing, spa	Baltic Food Weekend – Pop-up tastings on warm sand
April	Sand Sculpture Days – Artists & workshops	Spring Bloom Ritual – Aroma steam, floral ambiance
May	Mind & Movement – Functional training camp	Mother's Day Brunch & Hammock Lounge

TARGET GROUPS & MARKETS

Target Groups:

- Families with children (safe, weather-independent fun)
- Wellness seekers and couples (relaxation, sensory immersion)
- Active lifestyle and sports tourists (indoor beach & sports year-round)
- Event and festival audiences (night-themed experiences, small festivals)
- Local residents (weekly wellness and recreation)

Target Markets:

Domestic (Estonia)

- Estonian families, wellness travelers, and youth groups seeking leisure and relaxation during the off-season. Strong familiarity with Pärnu supports repeat visits and local engagement.

Finland

- Finnish visitors who already associate Pärnu with summer holidays, now looking for new wellness-oriented and family-friendly reasons to return in other seasons.

Latvia

- Short-drive and train-accessible market. Latvian travelers are likely to visit for weekend getaways, seasonal events, and spa experiences.

Sweden

- An emerging growth market. Swedish travelers are culturally aligned with spa and wellness values and are receptive to novel indoor-outdoor hybrid experiences.

Germany

- Health-conscious and experience-driven tourists, especially in the shoulder seasons. Interested in spa culture, themed retreats, and atmospheric settings.

Poland and Lithuania

- Price-conscious, family-oriented travel segment with growing outbound interest in the Baltics. Strong summer travel habits could extend into shoulder seasons with targeted marketing.

Niche International Segments

- Includes wellness digital nomads, edutainment-seeking families drawn to light, warmth, and immersive experiences in darker months.

LOCATION

The facility is planned outside Pärnu's city area, in a more remote natural location that allows for year-round access while minimizing seasonal urban pressure. This placement enables a larger footprint for the structure and supporting services, better control of experience design, and potentially lower construction and land costs. The location also offers the chance to create a distinctive destination experience, supported by dedicated shuttle services or integration with Rail Baltica access nodes, and can connect with surrounding nature through hiking paths, nature observation spots, or winter adventure offerings.

Location-Based Strengths

- Connection to Pärnu's identity: Although planned outside the city limits, the Pärnu Beach Hall builds directly on the town's established identity as Estonia's "Summer Capital," creating a thematic and emotional continuity for both residents and repeat visitors.
- Opportunity for land availability and scalable development: A more remote location offers greater flexibility for spatial planning, allowing for larger footprints, future expansion, and integration with nature (e.g., forest buffer zones, dune-themed landscaping).
- Reduced congestion and seasonal stress: Positioning the attraction outside the central tourist area may help reduce pressure on city infrastructure during peak summer months, while distributing visitor flows more evenly throughout the region.
- Good future connectivity: The site's development can benefit from future improvements in accessibility via Rail Baltica and improved local road infrastructure, especially with appropriate planning for shuttle or micro-mobility options.

Location-Based Weaknesses

- Distance from existing core attractions: Most of Pärnu's tourism offerings—hotels, restaurants, spas, and beaches—are located within the city's compact center. A more remote location may reduce spontaneous visits and require stronger transport solutions and branding to maintain visitor flow.
- Visibility and accessibility challenges: Being outside the main visitor path might initially hinder awareness and footfall, especially among day visitors or walk-in tourists who stay within city boundaries.
- Higher infrastructure development needs: The site may require new access roads, utilities, and transport links, which add to investment costs and planning timelines.
- Potential perception gap: Some visitors may not intuitively associate an off-city location with Pärnu's iconic beachfront, requiring strong thematic design and storytelling to bridge this mental distance.

ECONOMIC SUSTAINABILITY

The modular design allows phasing and scalability based on seasonal demand and investment pace. Proximity to both local populations and weekend travelers from Tallinn, Riga and beyond allows pricing strategies to reflect purchasing power variation. Careful integration with accommodation and local tourism infrastructure (e.g. bundled hotel + Beach Hall passes) can extend visitor stay and average spend.

Key Revenue Streams

1. Individual Admissions

Day visitors form the core customer base, with dynamic pricing used to boost off-season and weekday attendance.

Events and programs (e.g. wellness festivals, beach cinema) drive repeat visits.

2. Group Sales & Packages

Special pricing for school groups, tour operators, birthday events, and sports clubs.

Bundled services: spa + meal, wellness package, sauna rituals, guided tours.

3. Corporate & Private Events

Rentable modular spaces for off-season company retreats, small-scale beach-themed conferences, and indoor sports competitions. Custom event pricing brings high-margin, low-volume revenue.

4. Ancillary Services

Food & Beverage: Baltic-style street food court, juice bars, evening lounges.

Retail: Swimwear, spa products, local crafts.

Wellness & Treatments: Spa treatments, private saunas, guided rituals and yoga classes priced separately (€20–€100).

5. Event Ticketing

Standalone events (e.g. night-time aurora projections, beach concerts, light art) bring additional ticket sales and cross-usage of facilities.

Price Benchmarking

A review of comparable indoor beach and spa destinations show a range of pricing options based on time, access zones and customer categories.

Destination	Day ticket (Adult)	Time-limited ticket	Family Pass	Season/Annual Pass
Tropical Islands (DE)	46 €	36 €	140 €	from 199 €
Therme Erding (DE)	43 €	29 €	120–140 €	from 250 €
Tatralandia (SK)	29 €	23 €	79 €	Seasonal options

Suggested Ticket Structure for Pärnu Beach Hall:

- Hourly pass (2h / 4h): €18 / €24
- Full-day ticket: €36 adults / €18 children
- Family ticket (2+2): €80
- Evening ticket (after 6pm): €12
- Event access add-on: +€5–10 depending on program
- Season pass (3 months): €89
- Annual pass: €199

INVESTMENT SCALE

A Flagship Destination for the Baltics

- Pärnu Beach Hall is envisioned as a high-impact, large-scale investment that positions the city as a leading year-round tourism destination in the Baltic Sea region. More than just an indoor leisure facility, the Beach Hall is designed as a multifunctional anchor attraction—blending wellness, recreation, events, and food culture into one unified experience. It also serves as a pilot site for ecologically intelligent tourism infrastructure.
- Estimated Total Investment €90–100 million
- Projected Facility Scale and Capacity Indoor area: approx. 18,000–22,000 m²
- Daily capacity: 2,500–3,000 guests
- Annual visitor target: 600,000+ including day visitors, wellness clients, event audiences, and food guests
- The scale reflects the ambition to not only attract international tourists but also provide lasting value for local residents and seasonal visitors. The investment enables a flexible, year-round operation model while setting new standards for climate-adaptive and emotionally engaging tourism infrastructure.

Funding and Phasing Considerations

- Public-private partnerships should be applied, especially in land provision, accessibility, and spa/health sector collaboration.
- Phased construction (e.g., start with beach arena + F&B; later expand spa/events) could reduce capital risk.
- EU green infrastructure or regional development funds may be available to support sustainability and low-carbon heating/cooling solutions.



COST BREAKDOWN

Category	Estimated range	Details
Land acquisition or long term lease	4-5 m€	Public sector participation important
Construction & Infrastructure	30-35 m€	Architecturally striking dome/hall, high-performance energy solutions, geothermal, solar, accessibility
Indoor Beach & Climate Simulation	10-12 m€	Real sand, LED sky domes, lighting design, tropical landscaping, airflow and humidity control
Wellness & Spa Complex	12-14 m€	Indoor pools, spa zones, themed saunas, treatment rooms, cold & heat experiences
Events & Hybrid Arenas	8-10 m€	Modular stage area, AV tech, digital screens, retractable seating, esports/VR capacity
Food & Beverage Village	4-5 m€	Multiple themed outlets, open kitchens, craft bars, pop-up containers
Edutainment & Immersive Zones	3-4 m€	Interactive museum/exhibition zone, climate learning, kids' areas, digital storytelling
Sustainability & Smart Tech	3-4 m€	Smart controls, rainwater harvesting, carbon footprint optimization, digital twin for operations
Design, Planning & Consulting	3-4 m€	Concept design, engineering, architectural services, legal, permits
Branding, Marketing & Launch	2-3 m€	Brand development, influencer campaigns, international PR, digital platforms
Contingency (10-15%)	10-13 m€	Inflation, design updates, demand scaling, global disruptions
Total estimated investment	90- 110 m€	

RISK ANALYSIS

The development of the Pärnu Beach Hall—while promising as a year-round, flagship indoor beach and wellness destination—also includes a range of risks across market, environmental, location-based, and operational dimensions.

Market-Based Risks

- Demand Overestimation: If the annual visitor numbers fall below 350,000, the operational model may not generate sufficient revenue to cover high fixed costs.
- Price Sensitivity: Baltic and domestic markets are price-sensitive. If ticket prices are perceived as too high, especially outside holiday seasons, volume may suffer.
- Competition: Competing attractions in Finland, Sweden, and Central Europe (e.g. Tropical Islands, Therme Erding, Lalandia) may be preferred due to brand recognition or location.
- Seasonal Demand Fluctuation: Although designed as a year-round venue, Pärnu's image is strongly summer-oriented. Off-season months (September–April) may require significant marketing effort and events to maintain visitor interest.

Environmental Risks

- Energy Use and Carbon Footprint: The facility's heating and humidity control systems require high energy consumption. Rising energy costs or stricter EU climate regulations could impact sustainability and operations.
- Water Management: Pools and indoor vegetation require large water volumes and filtration infrastructure, increasing costs and sustainability scrutiny.
- Extreme Weather Events: Although located inland from the coast, long-term climate change impacts (e.g. flooding, extreme storms) could affect accessibility or insurance costs.

RISK ANALYSIS

Location-Based Risks

- Peripheral Location: As the site is planned outside the Pärnu urban core, additional investments in mobility, signage, and surrounding infrastructure may be needed to ensure easy access.
- Visitor Perception: Tourists may expect attractions to be located closer to the beach or town center; convincing them to travel farther requires high perceived value.
- Limited Local Population: The relatively small local market means strong reliance on regional, national, and international tourists for viability.

Operational and Financial Risks

- Capital-Intensive Nature: The €100M+ investment scenario is significant for a destination of Pärnu's scale. Financing risk and long payback periods need to be considered.
- Staffing Availability: Recruiting and retaining trained hospitality and maintenance staff year-round, especially in off-season, may be difficult in a smaller city.
- Event Viability: Events are key for winter attraction, but require programming, logistics, and partnerships. Weak event planning could reduce off-season appeal.

Risk Mitigation Strategies

- Adopt flexible pricing and strong pre-sales strategies.
- Develop a strong off-season event calendar and wellness programs.
- Explore public-private partnerships and EU green transition funding for energy-efficient infrastructure.
- Invest in shuttle services or light mobility solutions to improve accessibility.
- Begin with a scalable, phased development approach if capital availability is uncertain.

SUMMARY: STRATEGIC OPPORTUNITIES AND STRENGTHS OF THE PÄRNU BEACH HALL CONCEPT

The Pärnu Beach Hall represents a bold, yet grounded response to the region's ambition to become a truly year-round tourism destination. The concept leverages Pärnu's strong seasonal brand identity, its wellness and spa heritage, and growing interest in immersive, all-weather leisure experiences.

Strategic Strengths

- Concept Modularity: The design is flexible, allowing for phased investments and multi-use programming—from daily wellness visits to large-scale events.
- Target Market Fit: Appeals to families, wellness seekers, Nordic and German visitors, and domestic travelers with weather-proof, low-barrier activities.
- Tourism Portfolio Diversification: The project strengthens Pärnu's position in the competitive Baltic and Nordic tourism landscape, differentiating it beyond traditional summer offerings.
- Economic Sustainability Potential: A diversified revenue model with admissions, spa services, food & beverage, events, and retail supports long-term viability.
- Strong Narrative: “Eternal Summer in Pärnu” is a simple, emotionally resonant idea that builds on Pärnu’s existing identity in a way that feels both natural and ambitious.

Key Opportunities

- Year-Round Appeal in a Summer-Dominated Market: The concept transforms Pärnu's “Summer Capital” image into a permanent experience—extending the season from 3 months to 12.
- First-of-Its-Kind in the Baltics: No comparable indoor beach destination exists in Estonia or the neighboring countries, providing a clear first-mover advantage.
- Complementary to Existing Offerings: The Beach Hall does not compete with existing spas or outdoor beaches but adds a new layer—enhancing the overall tourism ecosystem.
- Event and Wellness Programming Potential: With themed events, edutainment, wellness retreats, and sport tournaments, the attraction offers a dynamic content calendar especially between September and May.
- Aligned with Future Connectivity (Rail Baltica): Improved regional access and increasing short-break travel trends support the long-term visitor potential of the concept.

In summary, the Pärnu Beach Hall is not just a new attraction—it is a statement of intent for the future of the destination. If implemented with vision, agility, and strong partnerships, it has the potential to become one of the most iconic tourism developments in the region over the next decade.

MARKETING STRATEGY VISION

Positioning & Concept Vision

Pärnu Beach Hall will be positioned as the Nordic region's only indoor beach experience, combining tropical comfort with wellness and cultural programming. The concept transforms the essence of Pärnu's "Summer Capital" identity into a year-round immersive destination, appealing to both locals and international visitors.

Core Value Promise

Relax like it's July — all year round. Whether you seek warmth, wellness, events, or a playful escape, Beach Hall delivers summer feelings regardless of season.

Strategic Role in Pärnu's Brand

- Reinforces Pärnu's leadership in wellness and seasonal innovation
- Bridges the gap between summer demand and off-season offerings
- Creates PR visibility as a unique, photogenic, and shareable attraction
- Anchors a new narrative: "Pärnu – not just for summer."

Target Emotion & Identity

Light, warmth, nostalgia, and novelty — a feel-good escape with a Nordic-Baltic twist. The brand tone is positive, sensory, and visually bold. It invites discovery, relaxation, and repeat visits.

Visual Language

Sun-drenched interiors, natural textures, soft blues and golds, playful contrasts of indoor/outdoor. Sand, light, water, and sound form the core palette for storytelling.



KEY MARKETING OBJECTIVES

1. Establish Year-Round Appeal

Position Beach Hall not as a seasonal extension, but as a flagship indoor destination worth visiting any time of year.

2. Activate Domestic Demand

Drive consistent visitation from Estonian families, couples and wellness seekers—especially in off-season weekends and holidays.

3. Regain Familiar Foreign Audiences

Reignite interest among Finnish, Latvian and Swedish travelers who associate Pärnu with summer, offering them new off-season reasons to return.

4. Build Awareness Internationally

Attract attention from German-speaking wellness and experience travelers through themed digital campaigns, tour operators, and content partnerships.

5. Reinforce Brand Identity

Communicate the Beach Hall experience as playful, warm, nature-inspired and immersive—reflecting the best of Pärnu in any weather.

6. Drive Repeated Visitation Through Programming

Use regular events, seasonal activations and loyalty tools to encourage multiple visits per year from both locals and tourists.

7. Support Sustainable Mobility Choices

Incentivize travel via Rail Baltica, shared mobility, and package deals with low-impact transport modes



COMMUNICATION CHANNELS AND PHASING

Launch Phase (T-12 to T+6 months)

Objective: Create excitement and define the Beach Hall narrative

- Owned media: Concept teasers, mood films, behind-the-scenes (social media, landing page)
- Earned media: Travel media exclusives, interviews, sneak previews with influencers and journalists
- Paid media: Digital ads in key markets (EE, FI, LV, SE) with off-season appeal
- Events: Soft opening, press day, co-branded launch experiences

Growth Phase (Year 1–2)

Objective: Drive steady visitation and repeat visits

- Content marketing: Seasonal themes (e.g. Light & Sauna Festival, Winter Beach Yoga), visitor storytelling
- Loyalty & CRM: Newsletter, seasonal pass program, Rail Baltica bundled offers
- Partnerships: Wellness brands, tour operators, Visit Estonia & Visit Finland integration
- Local activation: School collaborations, wellness professional networks, city-wide joint campaigns

Mature Phase (Year 3+)

Objective: Expand reach and solidify year-round brand

- International campaigns: Theme-based storytelling for Central Europe (wellness, climate, architecture)
- B2B: MICE & group travel promotion, media packages, eco-retreats
- Community engagement: Co-created events, “local curator” series, venue rentals
- Innovation layer: Digital extensions – virtual beach tours, gamified experiences, interactive guides.



Concept 2:

Pärnu FlowPark – The Adaptive Arena of Culture, Sports & Events



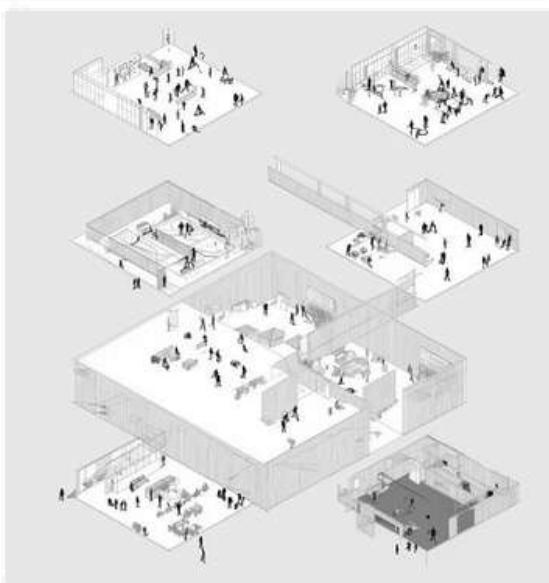
FLOWPARK

culture, sports & events

experience venue

adaptive arena

seasonal use modes



PÄRNU FLOWPARK – GENERAL CONCEPT

Pärnu FlowPark is a modular, hybrid indoor-outdoor arena and event venue that transforms with the seasons. It merges Baltic rhythm, digital innovation, and community spirit into a single multifunctional space. Built to activate Pärnu's off-season potential and serve as a cultural anchor and tailored to the scale, identity, and aspirations of Pärnu.

What makes FlowPark unique?

- It transforms seasonally: from e-sports arena to winter market, from urban culture hub to summer festival space.
- It merges physical and digital: a gamified, livestream-ready venue for hybrid experiences.
- It connects people: functioning as both a regional magnet and a local public living room.

Strategic Advantages

- Leverages Pärnu's connectivity (Via Baltica, Rail Baltica)
- Supports year-round visitation and off-season economic activity
- Aligns with Estonia's digital reputation and emerging creative industries
- Fills a clear gap for flexible, mid-sized event infrastructure in the region

The concept leverages:

- Pärnu's accessibility and potential Rail Baltica linkage
- Underutilized off-season potential in the region
- Rising demand for hybrid, transformable leisure spaces
- Estonia's digital reputation and growing interest in experience-based tourism

KEY FUNCTIONS AND SEASONAL PROGRAMMING

Main Arena Space

- Flexible capacity: 1,200–2,400 guests
- Retractable seating, modular floors
- Adaptable AV setup for concerts, sports, exhibitions, and immersive shows
- Designed for acoustic and lighting versatility

Seasonal Use Modes

- Autumn–Winter: E-sports, literature festivals, martial arts, night markets
- Spring–Summer: Outdoor climbing, food truck plaza, youth festivals, public yoga

Digital Experience Layer

- Livestream booths, VR/AR integration
- Gamified visitor app and real-time interactions
- Hybrid events and interactive exhibitions

Food & Beverage Zone, Rooftop Bar

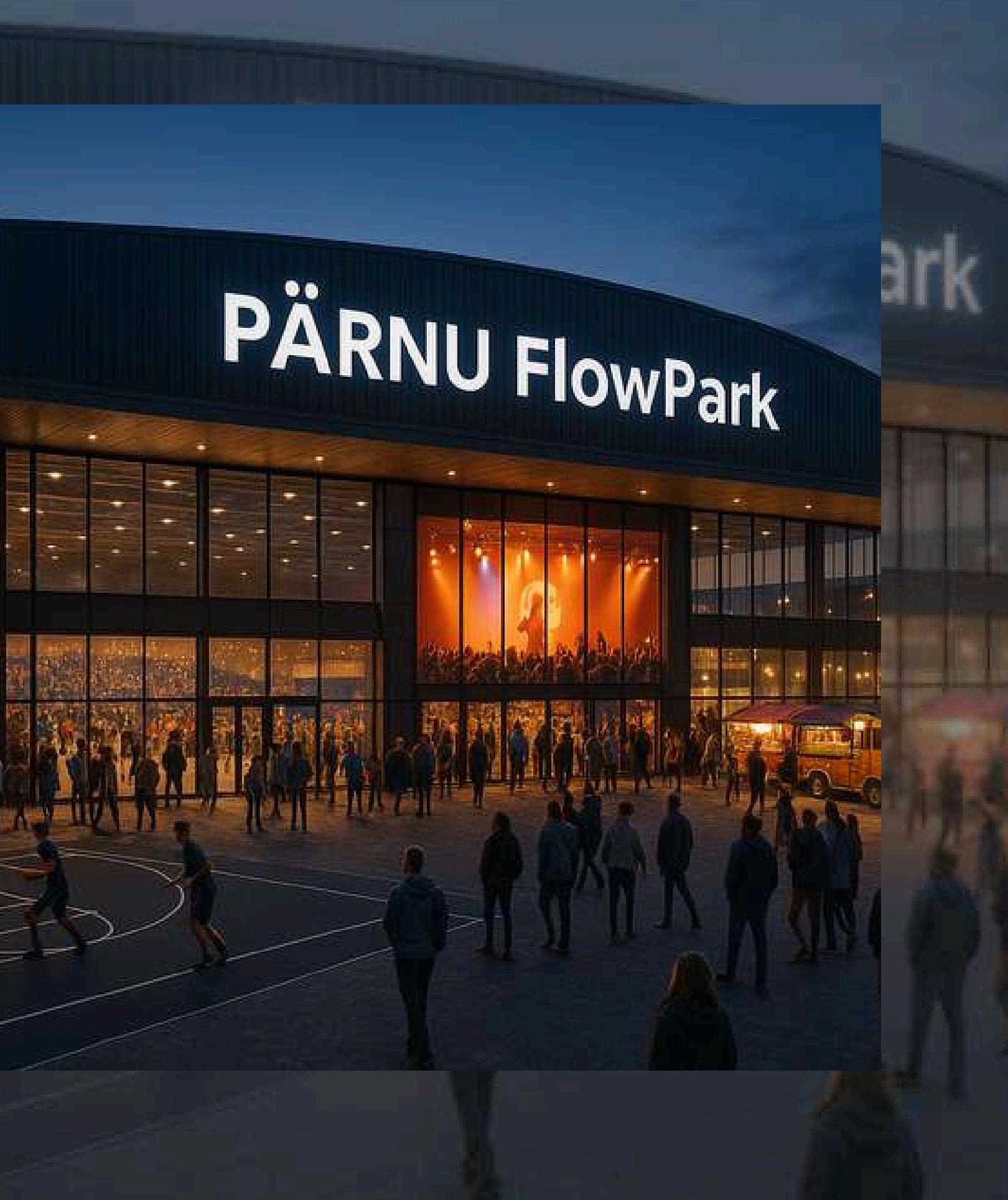
- Local startup kitchens and themed food events
- Nordic–Baltic street food fusion (e.g. smoked fish tacos, rye burgers)
- Smoothie & wellness café

Wellbeing & Recovery Area

- Infrared saunas and recovery tools
- Guided mobility and wellness classes
- Silent zones and sensory rooms for mental wellbeing

Off-Season Event Highlights

- E-sports tournaments & cosplay expos, Baltic Film Week, winter jazz, night literature, Urban culture nights: roller disco, dance battles, Dome shows, VR art rooms, night spa + DJ, Family festivals and community school events



ALTERNATIVE CONCEPT NAMES

Vibe360 Pärnu

Move, feel, experience – all year round – An immersive hybrid arena that adapts to the rhythm of the seasons. Vibe360 blends live events, active leisure, and digital interaction to create a constantly evolving experience for audiences of all ages.

Arena Nordica

A Nordic hub for events and encounters – Scalable and future-proof, Arena Nordica caters to concerts, sports, and conferences in one sustainable package. With its mid-sized profile and smart tech integration, it's a go-to venue for hybrid gatherings in the Baltic region.

CoreHaven Pärnu

The energetic heart of year-round entertainment. CoreHaven offers a transformable, mid-scale venue that shifts with the seasons. From beach volleyball courts to ice arenas, from e-sports to conferences—it's a smart, sustainable engine for cultural and sporting events that puts people, adaptability, and place at the centre.



TARGET GROUPS & MARKETS

Target Groups:

- Young adults and Gen Z: for e-sports, concerts, pop-up nightlife and interactive art
- Event-goers: locals and tourists interested in music, performances, and hybrid events
- Sports communities: for indoor tournaments, martial arts, and functional training
- Creative industries: for festivals, maker events, or digital culture weeks
- Corporate clients and institutions: hosting workshops, hackathons, and product demos
- Families and local residents: weekend activities, themed events, school performances

Primary Target Markets:

Domestic (Estonia)

- Estonian domestic market, especially active youth and urban families

Finland

- Nordic weekenders from Finland and Sweden interested in music, culture, and novelty

Baltics

- Baltic audiences (LT, LV) for short event-based getaways and fandom gatherings
- Event and sports producers across the Baltics/Nordics looking for affordable, flexible venues

DACH

- German-speaking DACH region: niche conferences, cultural events, or hybrid travel

LOCATION

Pärnu FlowPark is envisioned as a strategic anchor for year-round events and experiences, and its location plays a vital role in accessibility, visibility, and integration into the city's visitor flow. The primary location options are:

Near the Future Rail Baltica Station. Locating FlowPark near the upcoming Rail Baltica terminal would establish a strong gateway role for the venue—welcoming both regional and international visitors arriving by train. This would strengthen Pärnu's position as a transit hub for cultural tourism and events, offer convenient access for day-trippers from Tallinn, Riga, and other Baltic cities, allow for the development of adjacent services like hotels, cafés, or mobility hubs, and signal a future-oriented, well-connected destination concept.

At the Edge of the Beach Area (Unused Plot by the Shoreline). An alternative is to place FlowPark on a currently underused site at the northern or southern end of Pärnu's beach zone. This would enable seamless integration into the existing beach promenade and seasonal flow, off-season activation of the beach area with lights, installations, and festivals, year-round extension of the beach offering, linking to cafés, spas, and hotels, and strong branding through proximity to Pärnu's "Summer Capital" identity.

Location-Based Strengths

- Excellent Accessibility: Both proposed locations—near the future Rail Baltica terminal or at the edge of the beach zone—offer strong access for regional and international visitors.
- Symbolic Anchoring: Placement by Rail Baltica signals future-orientation and connectivity, while the beachside site reinforces Pärnu's summer brand.
- Synergy Potential: Both locations allow FlowPark to integrate with Pärnu's hospitality, events, and cultural services—maximizing cross-visitation and economic spillovers.
- Urban Regeneration: Either site can activate underused areas, support new development, and stimulate surrounding real estate and services

Location-Based Weaknesses

- Zoning and Permitting Needs
- Seasonal Accessibility Risks: Poor public transport coverage or bad weather may reduce off-season visitor flow, especially if not well integrated into city mobility.
- Local Impact: Large events could create noise or traffic concerns if mitigation is not planned.
- Brand Fit Sensitivity: The design and programming must align with Pärnu's identity to avoid perceived mismatch or elitism.

ECONOMIC SUSTAINABILITY

Pärnu FlowPark is designed as a multi-revenue platform, combining flexible use of space, hybrid event capabilities, and diverse customer experiences. Its economic sustainability lies in the ability to generate steady income from multiple visitor segments, throughout the year.

Key Revenue Streams

1. Events and Venue Rentals

Ticketed public events: concerts, festivals, sports matches, e-sports, seasonal shows
Private rentals: corporate meetings, conferences, product launches, private parties
Community and local group bookings (schools, clubs, associations). *Estimated share of revenue in mature year: 35–40%*

2. Day Visitors and Locals

General admission to exhibitions & attractions (e.g. indoor market, winter light park).
Regular programming: wellness classes, film nights, family play zones. Locals and domestic visitors create a reliable weekday and off-season base. *Estimated share of revenue: 20–25%*

3. Food & Beverage

One or two themed restaurants (e.g. sports bar, café lounge). Seasonal pop-ups or food trucks in the outdoor zone. Strong synergy with events and local food positioning. *Estimated share of revenue: 15–20%*

4. Wellness & Experience Services

Small wellness studio or spa corner: massage, recovery services, saunas. Drop-in day passes or memberships for locals. Option for partnerships with health tourism providers in Pärnu. *Estimated share of revenue: 5–10%*

5. Retail and Merchandising

Branded items, seasonal products, local crafts. Potential pop-up shops during events or Christmas markets. *Estimated share of revenue: 2–5%*

Diversification of Business Model

- Seasonal Flexibility allows for changes in capacity and function, avoiding low-utilization periods.
- Modular Construction reduces upfront investment and enables phase-based expansion.
- Event Programming Strategy ensures recurring high-impact moments to boost revenue peaks.
- Synergies with the City (e.g. Pärnu Spa culture, hotels, beach) boost indirect economic impact and cross-selling opportunities.

Conclusion

FlowPark can become a financially resilient cultural and event destination if operated with a diversified income structure and clear seasonal programming. The key to profitability is in balancing high-impact event peaks with steady local use and retaining flexibility to evolve with market trends.

INVESTMENT SCALE

A Year-Round Catalyst for Urban Life and Regional Events

- Pärnu FlowPark is designed as a flexible, multi-functional arena that can be scaled in phases to match funding availability and demand. Inspired by reference models such as Hype Areena (Espoo, Finland), which required a total investment of approximately €40 million, FlowPark's development in Pärnu is envisioned on a slightly smaller yet expandable scale.
- Estimated Total Investment €33–39 million
- Facility Scale and Capacity Indoor area (initial phase): approx. 6,000–8,000 m²
- Outdoor activation area: 2,000–4,000 m²
- Audience capacity: 1,200–2,400 (arena); up to 4,000 with outdoor area
- Target: 250,000–350,000 annual visitors (including events, wellness, community and hybrid uses)

Phased Implementation Strategy

- Phase 1: Core arena infrastructure, digital event platform, and initial anchor programming (e.g. wellness or indoor sports)
- Phase 2: Seasonal overlays (e.g. skating, street food zone), expansion into outdoor public space
- Phase 3: Integration with adjacent services – hybrid workspaces, youth innovation hubs, or creative labs
- The phased model allows FlowPark to grow alongside market response and partner interest, reducing risk while enabling long-term impact.

Funding and Development Outlook

Pärnu FlowPark lends itself well to a hybrid financing model, combining public–private partnership (PPP) approaches with targeted EU and regional development funding—especially under themes such as smart cities, innovation, and cultural tourism. The operational model could be managed by a private operator or foundation, ensuring flexible, revenue-driven use of the venue through event programming, space rental, and community partnerships. Additional revenue streams, such as sponsorships and naming rights for the arena or outdoor spaces, could further support long-term sustainability.

With phased development, strategic partnerships, and a clear value proposition, Pärnu FlowPark represents a realistic and impactful investment. As a scalable, multi-use venue, it can act as a mid-scale cultural and economic catalyst—energizing the city's off-season and anchoring Pärnu's evolution as a year-round destination.

COST BREAKDOWN

Category	Estimated range	Details
Land acquisition or long-term lease	1.5–2 m€	Securing strategic location through purchase or long-term lease; includes due diligence and site readiness.
Main indoor arena construction (1,500–2,500 seats)	15–18 m€	Construction of a multipurpose event arena with flexible floor space, durable materials, acoustics, climate control, and large-span structure for seasonal reconfiguration.
Modular systems & seasonal structures	2–3 m€	Mobile seating, demountable stages, pop-up walls, retractable roofing or shading systems to enable year-round use and spatial adaptability.
Digital infrastructure & hybrid event tech	1.5–2 m€	AV systems, streaming tech, virtual reality, esports readiness, audience interaction systems, and IT backbone for hybrid events.
Outdoor activation zone	1.5–2 m€	Flexible exterior spaces for seasonal programming such as food trucks, markets, art installations, and sports; includes surface prep, lighting, and outdoor utilities.
Interior design, furnishings & AV	2.5–3.5 m€	High-quality seating, modular furnishings, lighting, acoustics, signage, and immersive interior elements enhancing both comfort and experience.
Restaurant & wellness buildout	2.0–2.5 m€	Development of F&B services (e.g. open kitchen, bistro, rooftop bar) and compact wellness facilities (e.g. saunas, treatment pods, yoga/meditation rooms).
Project management, permits & contingencies	3–4 m€	Planning, architecture, engineering, legal, and permitting costs; includes risk buffers for delays, design changes, and inflation.
Contingency (10–15%)	3–4 m€	Inflation, design updates, demand scaling, global disruptions
Total Estimated Investment	33–39 m€	

RISK ANALYSIS

The development of Pärnu FlowPark—while offering strong potential as a dynamic, modular event and leisure venue—also presents a variety of risks, including market uncertainty, seasonal demand variability, operational complexity, and location-related challenges.

Market-Based Risks

- Competition for events and performers: As a mid-sized venue, FlowPark may struggle to consistently attract high-profile concerts, tournaments, or expos, especially when competing with larger arenas in Tallinn or Riga.
- Shifting entertainment preferences: The concept's success relies on evolving audience interests in live, participatory, and hybrid formats. A mismatch between programming and demand may impact repeat visitation or engagement.
- Programmatic positioning: Without a distinctive cultural, digital, or thematic identity, FlowPark risks being perceived as a generalist venue lacking a clear pull factor.

Environmental and Location-Based Risks

- Outdoor programming exposure: While designed to adapt to seasons, weather extremes (heavy snowfall, autumn storms) may limit the use of outdoor zones or create additional maintenance needs.
- Accessibility and transport linkage: If FlowPark is not optimally located in relation to pedestrian routes, public transport, or bike infrastructure, it may fail to attract regular local usage—especially during off-season months.
- Long-term flexibility vs. identity risk: A highly modular and adaptive concept may struggle to build a strong brand narrative if not anchored by clear values and experiential consistency.

RISK ANALYSIS

Community and Social Risks

- Perceived exclusivity: The arena must balance commercial operations with accessible programming for locals, or risk being seen as elite or disconnected.
- Noise and traffic concerns: Large events, even if well-managed, may raise concerns among nearby residents if not planned and communicated carefully.
- Mismatch with identity: If the programming or aesthetics feel out of sync with Pärnu's brand or values, public support could wane.

Operational and Financial Risks

- Dependence on event programming: FlowPark's success hinges on a strong, continuous calendar of events. Gaps in programming—especially during shoulder seasons—could lead to underutilization.
- Revenue unpredictability: Ticket-based models, food/beverage sales, and event rentals are highly sensitive to visitor flows and weather (for outdoor components).
- High initial investment: A €33–39 million investment carries long-term financing pressure and requires careful phasing or external partnerships.

Risk Mitigation Strategies

- Flexible programming model: Blend commercial, community, and cultural content for steady year-round use.
- Scalable build-out: Enable gradual investment based on traction and partnerships.
- Sustainability and cost-efficiency: Emphasize energy-efficient systems, digital hybrid options, and strong operator collaboration.
- Early stakeholder involvement: Engage locals, artists, schools, and event producers in shaping the use of the space.

SUMMARY: STRATEGIC OPPORTUNITIES AND STRENGTHS OF THE PÄRNU FLOWPARK CONCEPT

Strategic Location & Identity Fit

Pärnu FlowPark aligns naturally with Pärnu's identity as Estonia's "Summer Capital" by extending cultural and entertainment life beyond the high season. Its location near the new railway terminal or the edge of the beach zone allows for excellent accessibility while supporting broader destination development.

Seasonal Adaptability

The modular structure and hybrid indoor-outdoor setup offer exceptional flexibility for events throughout the year. FlowPark can morph from summer festival mode into a winter market, digital culture hub, or esports venue—maximizing usage across all seasons.

Mid-Sized Market Advantage

Unlike mega-arenas, FlowPark is tailored to a market like Pärnu: big enough for national and Baltic-level events, yet compact enough for local community use and cost-effective operations.

Diverse Revenue Streams

Income sources include ticketed concerts, festivals, and sports events, but also recurring local use (sports leagues, school events), business and conference rentals, food and beverage sales, wellness treatments, and seasonal pop-up concepts.

Community & Visitor Engagement

By including cultural programming, pop-up exhibitions, youth activities, and partnerships with local creatives, FlowPark becomes not just a venue but a cultural engine. Its concept strengthens local pride while also providing unique value to tourists.

Economic Multiplier Potential

Events and hybrid experiences can generate year-round accommodation demand, enhance the attractiveness of Pärnu in shoulder seasons, and stimulate surrounding hospitality and retail sectors.

MARKETING STRATEGY VISION

Positioning & Concept Vision

Pärnu FlowPark will be positioned as the Baltic region's most dynamic modular arena and urban culture hub, offering hybrid experiences that evolve with the seasons. It redefines the traditional event hall by blending sport, culture, wellbeing, and digital interactivity — all under one adaptive roof.

Core Value Promise

Where the city comes to play — every season, every style.

Whether you're skating in winter, dancing in spring, or gaming in autumn, FlowPark turns Pärnu into a year-round scene of energy and expression.

Strategic Role in Pärnu's Brand

- Brings Pärnu into the spotlight as a mid-scale event and youth culture destination
- Fills a critical gap in off-season indoor offerings with flexible, scalable infrastructure
- Strengthens the city's identity as a creative, tech-forward and wellness-aware community
- Attracts media, partnerships, and return visitation through bold programming

Target Emotion & Identity

Movement, energy, curiosity, and self-expression. The brand tone is urban, youthful, experimental, and inclusive. FlowPark speaks to people who want to move, connect, perform, or simply hang out.

Visual Language

A bold contrast of digital glow and raw textures — think recycled materials, LED lighting, street art-inspired visuals, and flexible modular spaces. Color palette mixes urban grays, neon highlights, and natural wood for grounding warmth.



KEY MARKETING OBJECTIVES

1. Generate Year-Round Awareness

Position FlowPark as a hybrid venue for sport, culture, and digital events. Highlight seasonally shifting functions: urban winter zone, summer arena, off-season festivals.

2. Engage Local and Regional Communities

Create loyalty and repeat visitation through community nights, open calls, and co-creation formats. Activate schools, youth groups, and creative networks through tailored programming.

3. Attract Niche and Trend-Driven Segments

Target e-sports fans, urban wellness seekers, and digital creatives across the Baltics and Nordics. Build visibility via influencer activations, tech culture festivals, and gamified marketing.

4. Secure Strategic Partners and Sponsors

Position FlowPark as a branded platform for startups, digital culture institutions, and event producers. Emphasize naming rights, modular sponsorship, and collaboration opportunities in food, tech, and recovery.

5. Support Pärnu's Year-Round Destination Strategy

Fill seasonal gaps in the city's visitor calendar with flagship events. Reinforce Pärnu's image as a forward-thinking, youth-friendly and experience-rich destination.



COMMUNICATION CHANNELS AND PHASING

Launch Phase (Year 1–2): Awareness & Curiosity

- Owned Media: Website, social media (YouTube, Instagram, TikTok), blog featuring behind-the-scenes development
- PR & Media: Tech and culture press, local/national media partnerships, sneak peek events
- Influencer Marketing: Urban creators, e-sports personalities, and Baltic/Nordic youth lifestyle influencers
- Events: Soft opening via local street culture festival or youth jam to spark visibility

Growth Phase (Year 3–4): Community & Content

- User-Generated Content: Gamified challenges, livestream competitions, digital art contests
- Partnership Activation: Schools, universities, e-sports leagues, and wellness communities
- Email & CRM: Loyalty programs, segmented updates, and seasonal programming teasers
- Local Media: Continuous coverage through success stories, profiles, and event announcements

Consolidation Phase (Year 5+): Regional Attraction

- Tourism Campaigns: Cross-border promotion with Visit Estonia and regional DMOs
- Business Channels: B2B outreach for hybrid event hosting, conferences, product launches
- Niche Channels: E-sports forums, tech/startup networks, cultural tourism platforms
- Brand Extensions: Merchandising, pop-up experiences, and offsite activations in Tallinn/Riga



Concept 3:

Pärnu PlayScape – Modular Destination District



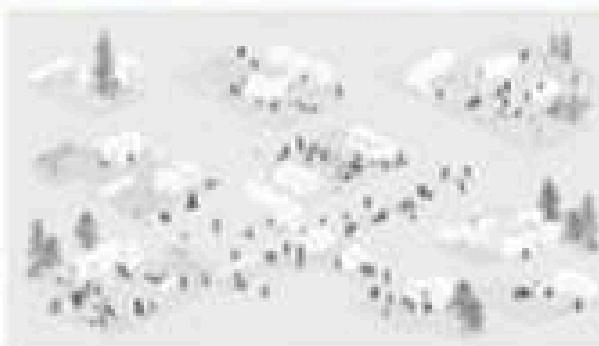
PLAYSCAPE

modular

adaptive reuse

transformable

multiple sites



PÄRNU PLAYSCAPE – GENERAL CONCEPT

Pärnu PlayScape is not a single building, but a multi-location visitor ecosystem that grows in stages across the beach–town zone. It turns underused spaces, seasonal tourism gaps and existing local strengths into a connected experience that works for both everyday visitors and international guests. Rather than centralizing all activity under one roof, PlayScape activates the city through modular, purpose-built elements that are each usable on their own – but stronger together. PlayScape is step-by-step, multi-location visitor experience that transforms how Pärnu is explored year-round.

What is PlayScape?

PlayScape is a modular tourism concept built across several walkable locations in Pärnu. It transforms currently underused areas—such as empty lots, heritage buildings and seasonal gaps—into a connected network of themed attractions. Unlike a single large facility, PlayScape grows over time through phased investments, starting small and expanding with demand.

How It Works in Practice?

Designed for Both Locals and Visitors

- Locals benefit from low-cost events, urban culture zones and year-round public space.
- Visitors experience curated, bookable content via one platform—family tickets, seasonal passes, and activity bundles.

Grows with the Seasons

- Summer: outdoor events, pop-ups, food & mobility network.
- Spring & Autumn: dome beach, art & wellness weekends, off-season bundles.
- Winter: light parks, music nights, heated spaces for culture & connection.

Integrated with the City

- Locations placed between beach, city center and Rail Baltica zone.
- No need for one “main gate” — it works as an open, discoverable district.
- Sustainable travel modes (e-scooters, walkways, e-shuttles) ensure access.

What Makes It Different?

- You don't visit PlayScape the building — you experience PlayScape the city.
- Instead of one costly megaproject, Pärnu gains a future-ready, adaptable tourism system that evolves with trends, demand, and seasons.

KEY THEMED FUNCTIONS AND ELEMENTS

Semi-Permanent Indoor Beach (Phase 1)

- Heated sand, tropical planting, and ambient design in a dome structure.
- Family play areas, pop-up bars, art-light installations, and beach yoga.
- Operates March–October to extend the beach season and attract wellness visitors.

Smart Booking & Loyalty Platform (Phase 2)

- A “Pärnu All-Season Pass” connecting attractions, services, and local businesses.
- Digital wallet, flexible ticketing, CRM integration, and bundling for Rail Baltica arrivals.

Creative Reuse of Urban Spaces (Phase 3)

- Conversion of historic buildings (e.g. canning factory) into:
 - Immersive exhibition rooms
 - Local gastronomy hubs
 - Digital storytelling and hybrid meeting venues

Modular Arena & Event Zone (Flowpark) (Phase 4)

- Compact, flexible space for concerts, e-sports, and winter festivals.
- Can adapt to season, visitor flow, and event scale.
- Supports outdoor programming like food fairs and light parks.

Soft Mobility Network

- E-shuttles, bikes, and walkways connecting PlayScape locations.
- Enhances sustainability, accessibility, and visitor experience.



ALTERNATIVE CONCEPT NAMES

Baltic Bloom

A destination that grows with the seasons. A layered, walkable district full of seasonally shifting attractions—from heated sands and water worlds to market halls and wellness corners. Baltic Bloom brings color and flow to the Pärnu experience throughout the year.

HoriZone Pärnu

Where local spirit meets the future. HoriZone transforms overlooked spaces into a canvas for innovation: art, wellness, mobility, and modular leisure concepts converge in a dynamic, accessible visitor district grounded in local culture and international appeal.

TerraScape Pärnu

Rooted in place – open to transformation. Inspired by terrain, tradition and technology, TerraScape is a flexible visitor district that connects nature-based wellness, indoor escapes and cultural encounters with smart mobility and unified branding – all year long.



TARGET GROUPS & MARKETS

Target Groups:

- Families and multigenerational travellers – benefiting from water-based fun, events, and flexible accommodation
- Leisure groups and event travelers – conference, sports and music visitors, attracted by modular infrastructure
- Experience seekers and digital nomads – drawn to temporary, rotating events and creative local programming
- Local residents – encouraged to return regularly thanks to seasonal programming and modular pricing

Primary Target Markets:

- Estonia & the Baltics – weekenders and domestic tourists
- Finland, Sweden, Germany – families and culture-seeking travellers
- Conference and events market – hybrid business-leisure experiences with flexible infrastructure
- Central Europe (DACH) – highly mobile camper van, spa and wellness audiences
- Summer + Shoulder season family market – users of loyalty travel platforms

LOCATION

PlayScape is designed as a distributed concept, with each phase and attraction cluster strategically located to complement Pärnu's existing strengths and utilize underutilized spaces, meaning that rather than one central facility, PlayScape leverages multiple sites to build a cohesive, walkable destination area. The Semi-Permanent Indoor Beach Dome would be located directly on or near the Pärnu beach promenade, on currently underused land, making it accessible from both the historic old town and existing beach infrastructure, and forming the seasonal anchor of PlayScape from March to October, thereby reinforcing the beach identity even beyond summer and naturally connecting with seasonal outdoor activities like SUP, cycling, and light art. An Adaptive Reuse Zone targets buildings just off the beach zone or near the town center, such as the former fish cannery factory, which are currently unused or semi-used, retaining urban texture while creating vibrant, atmospheric spaces that are easily accessible by foot, e-scooter, or light local transit. The Event Arena (FlowPark) could be positioned near Pärnu's planned Rail Baltica station, allowing for regional event access, or alternatively, on vacant land at the edge of the town-beach corridor, enabling synergies with seasonal tourism and offering staging space for outdoor events or temporary installations.

Location-Based Strengths

- Modular structure enables step-by-step development and investment over time.
- Combines underused lots and buildings into a new identity-rich district.
- Beach and town remain connected – tourists don't have to choose between urban and coastal.
- Supports walkability, sustainability, and local business clustering.

Location-Based Weaknesses

- Requires strong coordination across landowners, city planning, and infrastructure agencies.
- Brand clarity may be a challenge without unified physical entrance – mitigated by digital tools.
- Initial visitor volume might be fragmented if opening phases are not sufficiently promoted together

ECONOMIC SUSTAINABILITY

Pärnu PlayScape offers a diversified and resilient economic model based on modularity, seasonality balance, and flexible revenue generation. Rather than relying on one attraction, PlayScape builds income through a portfolio of micro-destinations with tailored pricing and offerings for different target groups and seasons.

Key Revenue Streams

1. Individual Visitor Revenues

Entrance Fees: Semi-permanent indoor beach dome

Flexible “Pärnu All-Season Pass” offers multi-attraction access with dynamic pricing.

Retail & Food Services: Themed food courts, local product markets, wellness cafés, and pop-up dining bring in additional per-visitor spend.

Activity and Service Add-ons: Paid classes (e.g. yoga, art), guided family programs, mini-concerts, sauna & spa treatments.

Merchandise: Branded “Pärnu Eternal Summer” or “Flow District” gear, local crafts, event merchandise.

2. Group and Event Revenues

Corporate & Conference Use: Mid-size venue bookings for seminars, hybrid events, and team-building (especially near Rail Baltica station).

Indoor beach dome and creative spaces available for off-season private events and company retreats.

Event Programming: Ticket sales from monthly cultural/sports/pop-up event Co-hosted festivals and rental of modular venue elements to third parties.

3. Tourism Packages and Cross-Promotion

Bundled Packages: Partnering with hotels, spas, and tour providers to build themed short-break packages.

Dynamic pricing for families, seniors, and loyalty club members.

Loyalty and Digital Passes: Revenue from subscription-type services

4. Long-Term Income Streams

Tenant Income: Rent from permanent micro-attraction operators (e.g. themed play centers, VR studios, design shops).

Brand Partnerships: Collaborations with Baltic and Nordic brands (sports, wellness, tech) for visibility and co-created events.

INVESTMENT SCALE

Pärnu PlayScape is a cost-adaptive, phased development model that allows for early activation with modest investment and long-term growth through modular expansion. It is designed for blended financing and partnership-based implementation, making it a resilient and low-risk path toward year-round tourism transformation.

Investment Scenario: Pärnu PlayScape

- Pärnu PlayScape is envisioned as a modular and phased investment, enabling the city to pilot, scale, and refine its year-round visitor ecosystem over time. The initial phase—such as the semi-permanent beach dome—can be launched with a moderate investment of €8–10 million, while future phases build upon proven demand and operator interest.
- Key elements of the investment logic include:
- Phased Development: From pop-up and seasonal modules to full adaptive reuse and event infrastructure.
- Flexible Public–Private Model: Allows different components (e.g. food, wellness, events) to be leased or operated independently.
- Cost-Efficient Land Use: Utilizes existing city plots, industrial heritage sites, and temporary permits to reduce capital costs.
- EU and Innovation Funding: Strong eligibility for circular economy, sustainable tourism, and digital transition funding programs.
- This model aligns with evolving tourism behaviors and infrastructure opportunities like Rail Baltica. Its built-in flexibility enables scalable co-investment and makes PlayScape a strong candidate for cross-sectoral partnerships.



COST BREAKDOWN

Category	Estimated range	Details
Phase 1 – semi-permanent indoor beach dome	6-8 m€	Heated sand zone, light structures, modular installations (March–October operations).
Phase 2 – Smart ticketing, loyalty, and e-mobility loop	2-3 m€	Centralized booking, digital pass platform, pilot e-shuttle or micro-mobility options.
Phase 3 – Flexible event field or arena structure	25-30 m€	FlowPark concept or similar, 1000–2000 capacity, scalable and modular
Phase 4 – Creative hubs (adaptive reuse)	4-6m€	Renovation of 1–2 heritage/industrial buildings into event/market/cultural spaces.
Total (full implementation)	37-47 m€	Costs vary depending on scale, material choices, land ownership, and construction method.

RISK ANALYSIS

The development of Pärnu PlayScape—as a modular, city-integrated destination ecosystem—presents a unique set of risks across market behavior, urban planning, operational complexity, environmental resilience, and stakeholder alignment. While the model allows for flexibility and phased investment, its success depends on strong coordination, consistent branding, and adaptive infrastructure.

Market-Based Risks

- Fragmented Visitor Flow: Unlike a single indoor center, PlayScape relies on multi-site visitation. There is a risk of drop-off between attractions if not well-integrated or branded.
- Changing Consumer Preferences: Trends toward minimalism, climate anxiety, or localism could shift interest away from themed or semi-permanent experiences.
- Seasonality Risk for Outdoor Components: Although it aims to balance seasonal effects, parts of the concept (like outdoor arenas or food areas) may still experience low usage in winter.
- Dilution of Identity: If the concept is not clearly branded and curated, it may appear too fragmented or lacking in a strong narrative.
- Operator Commitment: Success relies on enthusiastic and competent partner operators (cafés, galleries, arena managers) who align with PlayScape's ethos

RISK ANALYSIS

Location-Based Risks

- Spread Out Geography: Some locations may lack footfall unless mobility and signage are carefully designed.
- Zoning and Land Use: Repurposing existing buildings or adding semi-permanent structures may face planning or heritage restrictions.

Operational and Financial Risks

- Higher Coordination Needs: Managing several interconnected attractions and services increases complexity in operations, maintenance, and staffing.
- Gradual ROI: Phased development delays full economic returns. If one phase underperforms, it may affect the viability of later phases.
- Technology Dependence: The integrated smart pass and digital loyalty system may face adoption hurdles, technical failure, or data privacy concerns.

Risk Mitigation Strategies

- Clear theming and centralized communications across all nodes
- Pilot mobility options and central wayfinding to create a perceived “campus”
- Strong public-private investment strategy to de-risk early phases
- Energy planning with green building materials and solar options
- Agile development model with room for iteration and stakeholder input

SUMMARY: STRATEGIC OPPORTUNITIES AND STRENGTHS OF THE PÄRNU PLAYSPACE CONCEPT

Flexible and Phased Development

- PlayScape allows for gradual investment and scaling, reducing financial risk and enabling market testing.
- Each phase can function independently but gains value when linked as a network—creating momentum and visibility over time.

Blended Visitor Experiences

- Combines wellness, creativity, culture, events, and family activities into one evolving ecosystem.
- Appeals to diverse audiences (families, digital nomads, leisure groups) across seasons.

Strategic Use of Existing Assets

- Integrates Pärnu's existing strengths—beachfront, old industrial buildings, urban culture—into a reimagined tourism product.
- Encourages adaptive reuse and local entrepreneurship.

Year-Round Tourism Boost

- Indoor dome attraction expands the beach brand into the colder months (March–October).
- Event infrastructure and rotating pop-ups extend visitor appeal to off-peak periods.'

Smart Commercial Model

- Potential for "Pärnu All-Season Pass" and centralized digital loyalty system increases cross-visitation and spend-per-visitor.
- Enables bundled offers (accommodation, mobility, wellness) to drive longer stays and repeat visits.

Sustainability and Urban Integration

- Encourages walkability and light mobility between zones, easing congestion and supporting green travel.
- Builds community engagement by offering spaces that evolve and host local events.

Positioning Advantage

- Unique in the Baltic context: No other city in the region offers such a modular, interlinked tourism ecosystem.
- Aligns with post-pandemic travel trends: flexibility, hybrid experiences, wellness, and authenticity.

MARKETING STRATEGY VISION

Positioning Statement

Pärnu PlayScape will be positioned as a next-generation urban leisure ecosystem — a living playground that adapts to the rhythm of the city and the seasons. It combines modular spaces, playful innovation, and cultural layers to create a flexible, all-year visitor experience.

Core Value Promise

The city is your playground — discover it differently every time.

From interactive domes to pop-up saunas, digital journeys to street food events, PlayScape is always evolving — and always welcoming.

Strategic Role in Pärnu's Brand

- Bridges multiple themes: creativity, wellness, youth culture, gastronomy
- Revitalizes underused urban space through temporary and smart structures
- Supports new entrepreneurship and low-barrier cultural production
- Adds flexibility to Pärnu's tourism offering — no need for a “big build” to make an impact

Target Emotion & Identity

Curiosity, spontaneity, creativity, connection.

The tone is urban, inclusive, imaginative, and open-ended — it speaks to explorers of all ages.

Visual Language

Layered visuals: neon + nature, raw industrial + playful color, digital overlays.

Think street food aesthetics, Baltic noir meets festival glow, modular textures and light-based storytelling.



KEY MARKETING OBJECTIVES

- Create buzz through experimentation
- Use pop-up launches and interactive previews to generate grassroots interest
- Activate the local creative scene early to build ownership and content flow
- Build a digital-first destination identity
- Smart ticketing, gamified passes, and personalized visitor journeys
- Leverage digital tools for storytelling, loyalty, and data-driven iteration
- Engage young travelers and urban creatives
- Position PlayScape as a cultural lab and urban playground for Gen Z and Millennials
- Tie into wellness, sustainability, and digital nomad trends
- Support off-season activation of Pärnu
- Make March–May and September–November active months via thematic events
- Showcase PlayScape as a reason to visit Pärnu outside the classic summer
- Promote inclusion and access
- Family offers, low-cost events, multilingual content, and strong local partnerships
- Position PlayScape as a place for all — regardless of age, background, or ability



COMMUNICATION CHANNELS AND PHASING

Launch Phase (Phase 1 Dome Zone & Brand Reveal)

- Social Media: Teasers, construction diaries, and behind-the-scenes storytelling
- Local PR & Partnerships: Collaborate with artists, food vendors, schools
- Events: Opening “Play Weekend” with light art, workshops, and family programs
- Smart Pass Promotion: Introduce the PlayScape app and loyalty platform

Growth Phase (Phases 2–3)

- Digital Campaigns: Highlight cross-attraction experiences with bundled pricing
- Content Creators: Invite travel bloggers, wellness creators, street food YouTubers
- Email Marketing: Segmented campaigns for families, creatives, wellness seekers
- Community Content: Use local stories and user-generated media in national campaigns

Consolidation Phase (Full Ecosystem & Arena Activation)

- Cross-border Collaboration: Market with Latvia, Finland, and Germany
- B2B & Event Channels: Conference organizers, hybrid event agencies, innovation tours
- Cultural Tourism Platforms: Feature PlayScape in experience-based travel outlets
- Long-Term Branding: Extend the concept to souvenirs, touring PlayScape pop-ups, and seasonal “Play Days” across Estonia



COMPARATIVE SUMMARY

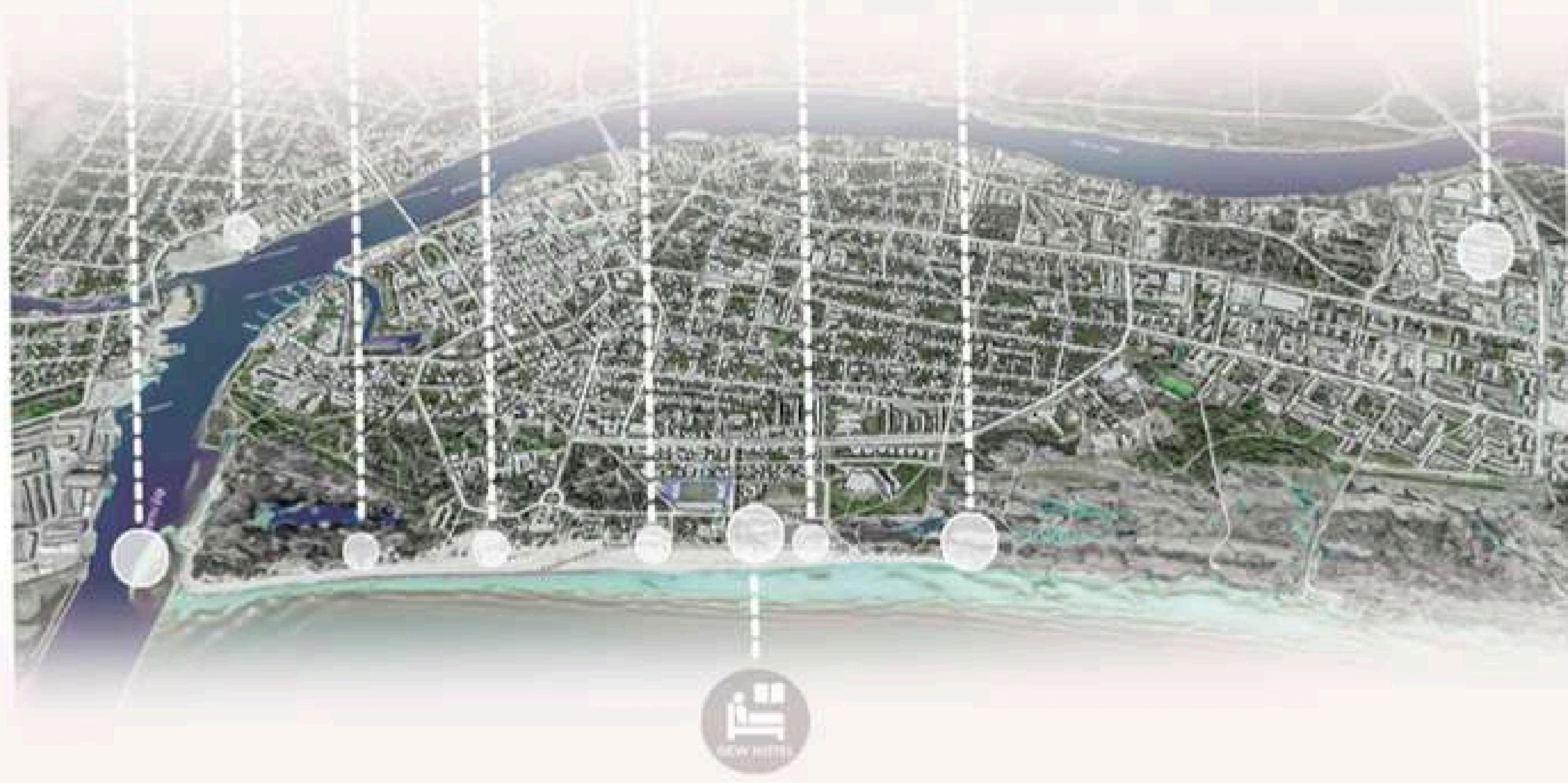


COMPERATIVE SUMMARY

This section compares the three proposed concepts—Beach Hall, FlowPark, and PlayScape—to clarify how each contributes to Pärnu's long-term tourism development. It highlights the key differences and shared elements, outlines scalable investment pathways, and examines how the concepts align with urban planning, mobility, and destination branding goals. Through this comparison one can identify:

- Short-term and long-term development priorities
- Opportunities for synergistic phasing
- Concept combinations that deliver balanced, year-round appeal

	Beach Hall	FlowPark	PlayScape
Format	Single, enclosed indoor venue	Modular hybrid arena	Distributed attraction ecosystem
Visitor Focus	Families, wellness seekers, leisure	Event-goers, youth, active travelers	Experience seekers, creative tourists
Seasonality Impact	Strong off-season anchor	Year-round cultural activator	Flexible phasing across seasons
Development Model	High upfront investment	Phased, mid-scale investment	Incremental, modular roll-out
Operational Structure	Centralized	Operator-led	Mixed operators and locations
Branding Logic	“Flagship destination”	“Urban pulse hub”	“Evolving city playground”



INTEGRATION POTENTIAL WITH PÄRNU'S URBAN AND TOURISM STRATEGIES

Anchoring the Future in the City's DNA

Each concept strengthens Pärnu's long-term goals by enhancing its identity, improving visitor flows, and aligning with sustainability and community development objectives.

Strategic Fit with Tourism Development

- Supports Pärnu's shift toward year-round tourism and reduced seasonal dependency
- Builds on the "Summer Capital" identity while extending the brand into off-season wellness, culture, and events
- Offers new reason-to-return for repeat visitors, especially from Finland, Sweden, Latvia, and Estonia

Urban Regeneration and Local Identity

- Activates underused waterfront and industrial zones through creative reuse and modular development (esp. PlayScape)
- Reinforces community spaces and access to recreational, cultural, and wellbeing services
- Encourages walkability and soft mobility, connecting attractions with beach, parks, and town center

Alignment with Sustainability Goals

- Concepts promote energy-efficient architecture, multi-use space, and circular economic thinking
- Enables Pärnu to pilot climate-adapted tourism (e.g. Beach Hall indoor climate, soft transport models in PlayScape)
- Supports green transition goals through local entrepreneurship and low-season programming

Intermodality and Accessibility

- Leverages Rail Baltica and ferry terminal development to strengthen regional connectivity
- Enhances visitor experience with digital tools and bundled services (e.g. smart pass, loyalty system)

The concepts are not isolated attractions, but integrated pieces of a larger vision—shaping Pärnu as a smart, inclusive, and future-ready destination for both visitors and residents.

PHASING AND INVESTMENT PATHWAYS

Pärnu has three distinct development concepts—Beach Hall, FlowPark, and PlayScape—each offering a different rhythm, scale, and financing model. This allows the city and its partners to balance ambition with feasibility, respond to investment conditions, and phase development according to market dynamics.

1. Beach Hall – Flagship First

A bold, single-phase project that positions Pärnu as a year-round wellness and leisure destination.

- Approximate investment: €90–100M
- Requires a strong lead investor/operator structure
- Creates an immediate, iconic anchor attraction
- Boosts brand visibility and supports large-scale tourism cluster development

Focus: Immersive environment, wellness destination marketing, long-term destination positioning

2. FlowPark – Modular Cultural Engine

A medium-scale, staged cultural and event infrastructure that enables visible progress within a few years.

- Phased over 3–5 years
- Total estimated cost: €25–40M
- Phase 1: Core hybrid arena with digital layer
- Phase 2–3: Outdoor zones and tech/business integration
- Strong public-private cooperation potential
- Matches with youth, digital culture, and smart city funding sources

Focus: Year-round activation, exportable events, digital audience engagement

3. PlayScape – Incremental Ecosystem

A flexible, demand-driven model that grows over time and adapts to seasonal needs and funding availability.

- Step-by-step rollout, starting from Phase 1 dome zone (€8–10M)
- Followed by smart ticketing platform, adaptive reuse spaces, and micro-events
- Enables low-risk early activation and multi-operator models
- Supports distributed growth, walkability, and sustainable mobility
- Strong emphasis on marketability and bookable service packages

Focus: Quick wins with low threshold, bundled experiences, strong local and international sales logic

By sequencing and combining these models strategically, Pärnu can unlock visible improvements in the short term while laying the groundwork for sustainable, high-impact tourism development in the years ahead.

SUSTAINABILITY IMPACT ASSESSMENT



SUSTAINABILITY IMPACT ASSESSMENT

- The Sustainability Impact Assessment (SUIA) covers social, ecological, and economic dimensions.
- The assessment is qualitative and based on the three concept descriptions.
- In addition, the assessment has been conducted using Alusta Consulting Ltd's sustainability evaluation framework. The framework assesses key dimensions of sustainability through a so-called "traffic light evaluation," providing an overall picture of the differences between the concepts.
- The assessment has been carried out at a general level. A more detailed Sustainability Impact Assessment can be conducted once more comprehensive development plans have been prepared for each concept.
- The sustainability impacts of each concept can still be influenced through more detailed planning—for example, by involving stakeholders, carefully considering environmental impacts, and conducting thorough financial planning.

Achieves the goal extremely well	
Achieves the goal well	
Enables the achievement of the goal	
No effect / does not apply in this section	
Contrary to the goal	

SOCIAL SUSTAINABILITY EVALUATION

Pärnu's different tourism development models generally support social sustainability well. The models particularly take into account children and young adults. In addition, all three aim to offer year-round services for both local residents and tourists, thereby reducing congestion concentrated in the summer months.

Beach Hall offers a wellness and experience environment aligned with Pärnu's spa identity, supporting all population groups (families, the elderly, people with disabilities).

FlowPark is a highly community-oriented and multifunctional event venue that aims to attract both local and international active youth and adults. The FlowPark proposal acknowledges that it does not fully align with Pärnu's identity, but if implemented, it would enhance the diversity of the city's cultural landscape.

PlayScape highlights Pärnu's identity as a seaside city and emphasizes the region's cultural-historical values. The modular structure of the PlayScape proposal, spread across different parts of Pärnu, enables local accessibility and walkability but presents challenges for people with limited mobility. The multifunctional and experiential spaces activate local communities and support the participation of people of different ages and backgrounds.

Stakeholder engagement and local Involvement: Local residents, creatives, schools, and businesses should be actively involved in planning and programming in all three concept models. Co-creation boosts local acceptance and operational relevance. Early engagement reduces long-term resistance and aligns projects with local identity.

Social sustainability	Beach Hall	FlowPark	PlayScape
Consider needs of disabled	Green	Light Green	Red
Consider needs of elderly people	Light Green	Red	Light Green
Consider needs of young people	Green		Green
Use of local services	Grey	Light Green	Light Green
Connection to Pärnu's identity	Green	Light Green	Green
Community engagement	Red	Light Green	Green
Reduce seasonal congestion	Green	Light Green	Light Green
Do not produce annoying noise	Green	Red	Light Green
Do not produce annoying lighting	Green	Light Green	Light Green

ECOLOGICAL SUSTAINABILITY EVALUATION

All proposals require the use of new land and energy, but if implemented, the facilities would function as multifunctional and adaptable spaces.

Beach Hall invests in smart energy solutions and renewable energy, but its large water consumption and location outside the urban core reduce its ecological sustainability. The project aims to compensate for environmental impacts through technology and integration with nature. Beach Hall's location outside the city core may affect surrounding natural ecosystems—careful integration with nature paths is needed.

FlowPark offers a balanced ecological solution that combines spatial efficiency, optimized energy use, and multifunctionality. FlowPark's beach-edge location requires impact assessments on dune and shoreline habitats.

PlayScape is the most ecologically sustainable proposal. It makes use of existing infrastructure, is modular and scalable, and enables very low energy consumption and efficient resource sharing.

Ecological sustainability	Beach Hall	FlowPark	PlayScape
Supply of existing/planned renewable energy			
Low use of energy	Red		
Low use of water	Red	Yellow	
Low use of land area	Red	Red	
Multipurpose facilities and infrastructure	Green	Green	Dark Green
Utilisation of existing buildings and resources	Red	Red	Dark Green
Long lifecycle buildings	Red	Yellow	Dark Green
Maintain or grow biodiversity	Red	Red	Yellow
Support walkability	Grey	Grey	Dark Green
Sharing resources, enabling sharing	Grey	Dark Green	Yellow
Integration with nature	Yellow	Grey	Grey

ECONOMICAL SUSTAINABILITY EVALUATION

The **Beach Hall** project carries the highest financial risks: where can €100 million in investment be found, especially when profits would only materialize after a long period? The availability of year-round, skilled labor is also a challenge. To be profitable, the project would need around 600,000 visitors annually—an enormous number relative to the population of Pärnu and its surroundings. Some risks can be mitigated through a modular and phased implementation. If successful, the project would bring a significant economic boost and create a uniquely attractive destination for the entire Baltic region.

FlowPark has two proposed location options: 1) Near the Rail Baltica terminal, and 2) At the end of the beach, with the latter carrying slightly fewer financial risks. The terminal location could attract a broader visitor base. The scale of FlowPark aligns well with the local population base, yet it is large enough to attract visitors from across the Baltics. The revenue streams are diverse, enabling relatively stable income and economic impact across the region (hotels, spas, beach). However, the revenue is highly dependent on the appeal of the programming and weather conditions, and the venue may be too small to attract international events and performers.

PlayScape carries the least financial risk: existing infrastructure and buildings can be utilized, and implementation can be phased based on demand. Investment costs are reduced by using underutilized or city-owned land. Due to the nature of the project, it may also be eligible for public funding (e.g., circular economy initiatives). Since the project includes multiple activities, its success depends on the appeal and quality of all components; everything should work together. However, marketing, maintenance, and coordination are not so cost-effective in a networked operational model.

Economic sustainability	Beach Hall	FlowPark 1 & 2	PlayScape
Use of existing infrastructure	Red	Red	Green
Year-round activities	Green	Green	Green
Energy efficiency	Red	Light Green	Red
Scalable development	Light Green	Light Green	Green
Existing connectivity	Red	Red	Green
Future connectivity (Via Baltica)	Green	Green	Light Green
Beach accessibility	Green	Red	Green
Proximity of existing core attractions	Red	Red	Green
Low capital requirements	Red	Red	Light Green
Resilient to economic fluctuations	Red	Red	Light Green
Availability of workforce	Red	Light Green	Light Green
Low cost of construction	Red	Red	Light Green
Low cost of maintenance	Red	Light Green	Red
Low tourist volume needed for profitability	Red	Red	Light Green

ENHANCING PÄRNU'S REGIONAL ACCESSIBILITY THROUGH MULTIMODAL CONNECTIVITY



CONNECTIVITY DEVELOPMENT

Pärnu's future as a vibrant and sustainable destination is closely tied to how easily it can be reached — and how well it connects to surrounding cities, airports, ports and future rail links. This report outlines a realistic, multimodal approach to connectivity, built on the understanding that each mode of transport plays a distinct role in shaping access, experience, and competitiveness.

Air access to Pärnu is limited by structural factors, particularly the runway length and scale of the airport, making large-scale international aviation unlikely. However, seasonal charter services and niche connections remain feasible, especially when coordinated with tourism product development. Pärnu's proximity to Tallinn and Riga airports — both within two to three hours by road — ensures global accessibility in the interim and offers opportunities for intermodal planning. Cruise access shows strong growth potential within operational limits. The city's cruise infrastructure supports vessels up to 200 metres, making it ideal for premium, luxury and expedition cruise segments. Although this excludes larger ships, it aligns with Pärnu's scale and brand, enabling the city to focus on quality-driven, culturally immersive day-call visits.

The foundation of accessibility today lies in road connectivity, particularly the Via Baltica (E67), which links Pärnu directly with Tallinn, Riga, and Central Europe. These links support independent travel, group tourism, and flexible access throughout the year.

Looking ahead, the arrival of Rail Baltica in the 2030s will transform Pärnu's connectivity. High-speed train services to Tallinn, Riga and further into Europe will allow for fast, car-free, sustainable access — particularly beneficial for short-stay tourism, international events and low-impact travel. Rail Baltica will also integrate with air arrivals in Tallinn and Riga, creating seamless multimodal access for future visitors.

Ultimately, connectivity is only as powerful as the destination it serves. The success of air, cruise and land-based access hinges on how attractive, well-known and compelling Pärnu is as a destination.

As part of this project, a comprehensive set of recommendations has been developed to support the long-term development of accessibility in Pärnu. In the following section, we focus specifically on the connectivity perspectives and strategic access recommendations related to the proposed tourism concepts — outlining how each can be best supported through transport solutions, infrastructure, and multimodal integration.

MULTIMODAL ACCESS OVERVIEW

	Beach Hall	FlowPark	PlayScape
Air connectivity Pärnu, Tallinn (1:45h by car) and Riga (2:30h by car) airports	Air connectivity from Central Europe—such as Frankfurt, Germany—would help attract visitors from more distant markets. Direct charter flights to Pärnu Airport may be possible in the future. In the early stages, tourism growth will rely on connections via Tallinn and Riga airports, making efficient onward travel to Pärnu from these hubs essential.	Air connectivity from Central Europe—such as Frankfurt, Germany—would help attract visitors from more distant markets. Direct charter flights to Pärnu Airport may be possible in the future. In the early stages, tourism growth will rely on connections via Tallinn and Riga airports, making efficient onward travel to Pärnu from these hubs essential.	Air access plays a targeted yet limited role throughout the development of PlayScape. In the early phases, the focus should be on aligning selected air services with promotional campaigns targeting key markets via nearby hubs such as Tallinn and Riga. In the later stages, Pärnu Airport can support selective charter and scheduled flights from larger Central European key markets.
Cruise connectivity Pärnu Cruise Port	Could be promoted as a day excursion option for cruise guests during their port of call.	Could be promoted as a day excursion for cruise guests during port calls, and—with larger events—even as a reason for overnight stays by cruise lines.	While cruise guests represent limited potential due to relatively low volumes, they are nonetheless a key target audience — especially given the diverse and authentic experiences available in the Pärnu area. Acknowledging that premium and luxury cruise travellers, in particular, actively seek out such genuine, place-based encounters.
Rail connectivity No current rail connection, future Rail Baltica connection	The future Rail Baltica connection from Tallinn and the Riga–Warsaw corridor will significantly improve accessibility for a wide range of tourist groups, will enable also day visits from other parts of Estonia and neighbouring countries. The shuttles would improve the train connection usability.	The future Rail Baltica connection from Tallinn and the Riga–Warsaw corridor will significantly improve accessibility for a wide range of tourist groups, could support event visits from further destinations if train schedules are coordinated along the bigger events, shuttles from the station to event arena required	As with the previous scenarios, the future Rail Baltica connection from Tallinn and the Riga–Warsaw corridor will significantly enhance accessibility for a wide range of tourist groups, enabling them to experience a state-of-the-art travel destination offering a rich variety of experiences, activities, and events. If the destination is designed to be walkable, it will further encourage visitors to arrive by train, as there will be no need for a private car to move around within the area.
Road connectivity Via Baltica, other national roads	Good road access is essential for domestic visitors and those from neighbouring Baltic countries. Travellers from Finland and Sweden would primarily arrive via the Port of Tallinn, while road connections would also benefit visitors from Central Europe. This highlights the need for adequate parking facilities and raises the challenge of how visitors move within the area during their visit.	Good road access is essential for domestic visitors and those from neighbouring Baltic countries. Travellers from Finland and Sweden would primarily arrive via the Port of Tallinn, while road connections would also benefit visitors from Central Europe. This highlights the need for adequate parking facilities and raises the challenge of how visitors move within the area during their visit.	Good road access is essential for domestic travellers and visitors from neighbouring Baltic countries. Travellers from Finland and Sweden would primarily arrive via the Port of Tallinn, with road connections also serving those coming from Central Europe. This underscores the importance of adequate parking facilities near the destination and supports the implementation of a walkability-focused model within the attraction area during the visit.

CONCLUSION AND KEY FINDINGS

Pärnu's future competitiveness as a destination hinges on a balanced and realistic understanding of its transport potential. While connectivity across multiple modes is essential for sustainable tourism growth, each access channel presents its own opportunities and limitations — shaped by infrastructure, geography and market conditions.

Air Connectivity – Niche Potential, but Structural Constraints

Pärnu Airport offers proximity and efficiency, but its physical limitations — particularly the current 1,970-metre runway — restrict its ability to support large-scale commercial aviation. As such, the airport is best suited for select charter services, private aviation and niche seasonal routes using smaller aircraft.

Given the size of the city, surrounding catchment population, and service infrastructure, a significant increase in air traffic is not expected. Instead, air connectivity should support targeted use cases: short-break wellness visitors, regional events, or curated travel packages. Major international access will continue to rely on Tallinn and Riga airports, both within reasonable transfer distance.

Cruise Connectivity – Realistic Growth Within Operational Limits

Cruise tourism represents a viable and scalable growth avenue for Pärnu — especially within the premium, luxury and expedition segments. The city's cultural character, natural setting and walkable infrastructure offer an ideal backdrop for high-value, small-ship cruise experiences.

However, growth is structurally capped by port limits: the maximum vessel length of 200 metres excludes larger cruise ships from docking directly. While this restricts access to the mass-market cruise segment, it is not misaligned with Pärnu's tourism philosophy. Smaller ships bring manageable visitor volumes and align better with local service capacity, sustainability goals and the city's brand.

Opportunities remain to increase cruise traffic moderately and focus on improving the quality and relevance of shore experiences, encouraging longer excursions and higher local spending.

CONCLUSION AND KEY FINDINGS

Road and Rail Connectivity – The Backbone of Long-Term Access

Road access remains Pärnu's primary mode of inbound travel, particularly from neighbouring countries such as Latvia and Finland. The Via Baltica (E67) and national road network ensure reliable mobility for independent travellers and group tours alike. These links are fundamental to regional tourism resilience — and will remain so in the coming years.

Looking ahead, the single most transformative development will be Rail Baltica, due to connect Pärnu to Tallinn, Riga and beyond in the early 2030s. With high-speed rail reducing travel times to under one hour from each capital, this project will redefine regional accessibility — especially for environmentally conscious and car-free travellers.

Rail Baltica will not only connect Pärnu with metropolitan gateways and airports but also open up new short-stay and off-season travel flows, supporting a more sustainable tourism economy. Its integration with city-level mobility will be key: local shuttles, station-area development and intermodal services must be planned in tandem.

Summary

Pärnu's connectivity strategy must be selective, integrated and future-focused:

- Air travel should serve specialist and seasonal demand, not attempt to scale beyond infrastructural or market realities.
- Cruise tourism can grow within its operational niche, supporting quality over volume.
- Road access remains vital, while rail infrastructure will provide the next major leap in domestic and international accessibility.

This layered approach aligns with Pärnu's identity as a compact, high-quality destination — one that values sustainability, experience and long-term balance over mass tourism.

However, none of these developments can succeed without one critical factor: the perceived attractiveness and awareness of the destination itself. In a competitive travel market, even the best infrastructure requires compelling reasons for visitors to come. Strengthening Pärnu's international visibility, brand clarity and experiential appeal is essential — not only for tourism, but for the viability of the transport connections that depend on it.

Ultimately, connectivity and attractiveness must grow together — and reinforce one another — for Pärnu to reach its full potential as a modern, meaningful destination.

SUMMARY AND RECOMMENDATIONS



SUMMARY AND RECOMMENDATIONS

Pärnu's position as Estonia's Summer Capital is a powerful asset — but year-round vitality requires new, off-season attractions that expand the destination's relevance and appeal. This study presents three alternative concepts, each offering a different strategic pathway to strengthen Pärnu's tourism ecosystem beyond summer.

Concept Alternatives

1. Pärnu Beach Hall

A flagship-level indoor beach and wellness world that recreates summer sensations all year. Offers strong visual identity and wide appeal for wellness, leisure, and events.

2. Pärnu FlowPark

A modular indoor-outdoor arena designed for events, youth culture, e-sports, and hybrid community use. Activates off-season months through adaptable, high-frequency programming.

3. Pärnu PlayScape

A flexible, long-term development model based on a network of micro-attractions across the city. Emphasizes adaptability, local identity, and integration with Pärnu's fabric.

Each alternative represents a different scale, investment profile, and development logic — from iconic single-site venues to distributed, incremental ecosystems.

Key Observations

- All options support seasonality mitigation, but with varying focus (e.g. wellness, events, family, urban placemaking).
- Implementation can be staged, allowing for controlled risk, funding flexibility, and partnership development.
- Integration with Pärnu's tourism and urban strategies is essential — all concepts leverage location, connectivity, and existing identity in unique ways.
- Market dynamics support diversified development, with demand from domestic, regional, and international visitors for immersive and off-season experiences.

SUMMARY AND RECOMMENDATIONS

Strategic Guidance for Development

1. Choose a clear development pathway — but allow modularity.

Select one lead concept (Beach Hall, FlowPark, or PlayScape) based on strategic fit, ambition, and investment logic. Plan for phased growth, but commit early to a shared vision.

2. Align with long-term urban and tourism strategies.

Ensure that the selected concept strengthens Pärnu's identity as a sustainable, year-round destination. Link to wider themes such as wellness, culture, smart mobility, and climate goals.

3. Launch a systemised “Invest in Pärnu” programme.

Create a structured investment development process, combining concept packaging, prospecting, investor outreach, and financing strategy. Position Pärnu as a forward-looking tourism investment opportunity.

4. Prioritise sales, marketing, and brand development from day one.

Early-stage concept success depends on powerful storytelling, brand clarity, and market activation. Invest in concept-level marketing tools, visual identity, and content to build demand even before opening.

5. Ensure public sector leadership and long-term support.

Secure political, administrative, and national-level commitment to co-invest in infrastructure, land use, promotion, and destination competitiveness. A strong public mandate is critical for private confidence.

CONCEPT-SPECIFIC PRIORITIES

	Key Strength	Priority Recommendation
Pärnu Beach Hall	High-impact flagship concept with strong brand fit	Launch feasibility studies, site analysis, and anchor planning
Pärnu FlowPark	Adaptable venue concept aligned with urban life	Define phasing, anchor uses, and operational model
Pärnu PlayScape	Integrated, incremental citywide ecosystem	Create spatial plan and stakeholder roadmap for activation

Cross-cutting Priorities:

- Build sales and marketing strategy early, with narrative, naming, and channel planning.
- Initiate a dedicated tourism investment programme to attract private and institutional capital.
- Engage public authorities at city and national levels to ensure long-term co-financing and political alignment.

Each concept is viable — but long-term success depends on strategic clarity, resourcing, and shared commitment to Pärnu's tourism future.

BENCHMARKING CASES





1

Benchmarking process

The benchmarking process began with a broad review of over 40 potential cases from Europe and internationally, sourced from previous studies, trend reports, destination databases, and curated searches on platforms like TrendHunter, IAKS, and design and tourism innovation portals.

Initial selection emphasized:

- Year-round operation models
- Strong visitor volumes and proven economic performance
- Relevance to Pärnu's context, especially in wellness, indoor leisure, event hosting, and adaptable infrastructure
- Innovative integration with nature, community, or digital experience
- Scalability and lessons applicable to Pärnu's size and strategic position

From this wide set, five core benchmarking cases were selected for in-depth comparative analysis.



2

Benchmarking methods

Each case will be examined based on the following comparative criteria:

General Concept

What is the main idea, target audience, and positioning? Is it more entertainment-driven, wellness-focused, family-oriented, etc.?

Economic Model

What are the revenue streams (ticketing, food and beverage, rentals, events, sponsorships)? What type of ownership or funding model is in use (public, private, PPP)?

Visitor Flows & Numbers

Total annual visitors, peak vs off-peak season flows, capacity management, and length of visit.

Seasonality Management

How is the attraction made appealing year-round? What type of programming or climate solutions are used?

Location & "Spirit of Place"

How does the location (urban/peripheral/natural area) affect the visitor experience? Is it tied to regional identity or existing tourism assets?

Mobility & Infrastructure

Accessibility: connections to airports, rail, roads, parking. Integration with public transport or local mobility networks.

Relevance for Pärnu

What lessons or inspiring elements does this case offer for a potential year-round attraction in Pärnu?



1

Tropical Islands (Germany)

Scale and Variety: Europe's largest indoor resorts with multiple themed zones including tropical lagoons, sandy beaches, saunas, water slides, and rainforest trails. Offers options from indoor tents to hotel rooms and a nearby holiday home park—appealing to families, couples, and groups.

Consistent Off-Season Business: Operates year-round in a climate-controlled dome, attracting visitors even in winter months. Strong performance during school holidays and shoulder seasons supports economic viability beyond summer.

Integration with Local Market: Located just 60 km from Berlin and easily accessible by train, making it a popular destination for both day visitors and overnight guests from Germany and neighboring countries.



2

Therme Erding (Germany)

Scale and Variety: Europe's largest thermal spa with multiple pools, saunas, slides, and relaxation areas appeals to a wide range of visitor segments.

Consistent Off-Season Business: Indoor climate-controlled environment ensures year-round visitation, including in colder months.

Integration with Local Market: Close to Munich, accessible by public transport and local airports.



3

Tatralandia (Slovakia)

Scale and Variety: One of Central Europe's largest year-round water parks, Tatralandia offers 14 pools, 26 slides, themed saunas, wellness zones, and surfing simulators. Its holiday village with cabins and leisure activities attracts a wide mix, from families to wellness seekers.

Consistent Off-Season Business: Open year-round with extensive indoor areas and thermal water, ensuring steady winter traffic. Nearby Tatra Mountains enable synergies with nature, ski, and spa tourism.

Integration with Local Market: Located in Liptov, the park benefits from regional tourism networks and easy access from Slovakia, Czech Republic, and Poland. Its proximity to major routes and local attractions fuels strong domestic and cross-border demand.



4

Sandcastle Waterpark (UK)

Scale and Variety: The UK's largest indoor waterpark, Sandcastle in Blackpool features over 18 slides and attractions, including wave machines, lazy rivers, and zones for families and thrill-seekers. It also includes on-site cafes, retail, and is fully accessible.

Consistent Off-Season Business: With tropical climate control, the fully indoor facility operates year-round, attracting local and regional visitors, especially during school holidays and weekends.

Integration with Local Market: Located on Blackpool's promenade, it complements the city's seaside tourism and benefits from public transport access and high tourist footfall, making it a key part of the local leisure offering.



1



2



3



4

Fabrikken for Kunst og Design (Denmark)

Scale and Variety: Creative hub and event space located in a repurposed factory building. Hosts art exhibitions, design markets, workshops, community events, and small-scale performances. Designed for flexibility and modular use.

Consistent Off-Season Business: The space serves local creative professionals daily, while seasonal highlights such as open studios, design festivals, and temporary installations keep visitor flow steady throughout the year.

Integration with Local Market: Embedded in Copenhagen's design and innovation culture. Serves as a platform for local creators while offering authentic, small-scale experiences for visitors interested in creativity, urban culture, and sustainability.

Ballerup Super Arena (Sweden)

Cycling Hub: Leverages Denmark's strong cycling culture and infrastructure to host international cycling events, including UCI Track Cycling World Cups. Also supports community-level cycling activities and training.

Event Versatility: The arena's flexible layout allows for concerts, fairs, conferences, and sports beyond cycling —enabling year-round utilization and diversified revenue streams.

Excellent Connectivity: Located near Copenhagen, with easy access by public transport and highways. Part of the Greater Copenhagen area's event and sports infrastructure.

Partille Arena (Sweden)

Scale and Variety: A modern, mid-sized venue with capacity for up to 5,500 spectators, hosting concerts, sports (especially handball), exhibitions, and corporate events. Includes a restaurant, gym, and adaptable meeting spaces.

Consistent Off-Season Business: Operates year-round with a focus on sports seasons, entertainment, and business events. Its flexible setup supports quick transitions between event types for continuous use.

Integration with Local Market: Located in Partille near Gothenburg, the arena offers excellent access by car and public transport. It serves the local community while drawing regional and international events.

Hype (Finland)

Scale and Variety: A multi-functional arena combining esports, physical gaming, VR, themed events, and modular spaces. Hosts competitions, concerts, private group activities, and youth events.

Consistent Off-Season Business: Open year-round with flexible indoor programming and regularly updated content. Appeals especially to youth, school groups, and corporate clients.

Integration with Local Market: Located in Espoo, Hype Areena attracts strong local and regional traffic. It fills a gap in urban leisure and partners with schools and community actors to boost engagement.



DoTheBeach (USA)

Scale and Variety: A modular, franchise-based indoor beach concept with real sand, beach volleyball courts, event spaces, and wellness areas. Adaptable for leisure, sports training, private events, and themed gatherings.

Consistent Off-Season Business: Recreates the summer beach experience indoors to drive year-round demand. Popular for group bookings, community events, and regular use by sports teams and hobbyists.

Integration with Local Market: Centered on community involvement and flexible use. Typically located in urban or suburban areas with engaged local networks—sports clubs, youth groups, fitness communities—supported by strong digital marketing and outreach.



Moomin world (Finland)

Scale and Variety: A story-driven theme park based on the Moomin characters, featuring immersive outdoor areas, character houses, nature trails, performances, and interactive zones. Designed for young children and families, with a strong focus on storytelling and emotional connection.

Consistent Off-Season Business: Primarily seasonal with summer and themed winter openings, but year-round engagement continues through off-site events, digital content, merchandise, and seasonal themes.

Integration with Local Market: Located on an island linked to Naantali's historic center, the park supports local tourism—hotels, restaurants, harbor. Easily accessible from Turku and aligned with Finland's domestic travel culture. The strong brand identity boosts Naantali's appeal as a family destination.



Lalandia Billund (Denmark)

Scale and Variety: One of Northern Europe's largest indoor holiday and leisure resorts. Combines a vast tropical waterpark (Aquadome™) with indoor sports facilities, restaurants, shopping, holiday homes, and year-round family entertainment. Appeals to multi-generational visitors and long-stays.

Consistent Off-Season Business: The indoor, weather-proof nature of the resort allows for strong year-round visitation. School holidays, weekend packages, and bundled experiences (e.g. Legoland) help maintain steady demand even outside peak seasons.

Integration with Local Market: Located in Billund, a family tourism hub also home to LEGOLAND and an international airport. Lalandia's accommodation, F&B, and services extend visitor stays in the region, making it a central part of the destination's ecosystem.

TATRALANDIA (SLOVAKIA)

General Concept

Tatralandia is a large-scale year-round water park and wellness resort located in the Liptov region of Slovakia, near the Low Tatras.

The concept combines indoor tropical experiences with outdoor pools (in summer), wellness zones, saunas, lodging, and seasonal activities.

It is positioned as a family-friendly adventure and relaxation destination with multi-day appeal.

Key elements:

- Indoor water park with wave pools, slides, and thermal waters.
- “Tropical Paradise” with palm trees and 30°C temperature year-round.
- Wellness & Spa zone (Celtic Sauna World) with themed experiences.
- Holiday Village Tatralandia with 155 cottages and apartments.
- Close cooperation with the adjacent ski resort (Jasná) and Liptov region attractions

Economic Model

- Ownership: Operated by TMR (Tatry Mountain Resorts), a publicly listed company that owns ski resorts, hotels, and attractions in Central Europe.
- Revenue streams: Entry tickets, spa/wellness treatments, lodging packages, F&B, merchandise, and regional tourism partnerships.
- Package model: Strong integration with ski/winter sports, lodging, and wellness experiences – enables bundling of multi-day stay.



TATRALANDIA (SLOVAKIA)

Visitor Flows

- Visitor volume: Approx. 600,000–750,000 annual visitors.
- Length of visit: Day visitors (4–6 hrs) and overnight guests (1–2 nights).
- Visitor groups: Families with children, domestic tourists, Czech, Polish, German visitors.
- Strong in summer and winter seasons; shoulder seasons supported by spa and promotions.
- Uses indoor tropical zone to provide weather-independent appeal year-round.
- Collaborates with nearby ski resorts and thermal spa zones to attract winter guests.
- Off-season wellness promotions and themed events (e.g. sauna nights, family days).
- Continuous product updates (e.g. new slides, themed zones) to maintain interest

Location & “Spirit of Place”

- Set in a mountain-lake region known for outdoor sports and thermal waters.
- Utilizes regional identity: wellness, nature, active lifestyle, family holidays.
- Built with respect to local environment (uses thermal water sources).
- Promotes itself as part of the broader “Liptov” regional destination brand.

Mobility & Infrastructure

- Located ~60 km from Poprad–Tatry Airport and 2 hours from Kraków.
- Easily accessible by car, bus, and regional trains.
- On-site parking and shuttle services to ski resorts.
- Well-connected to other TMR-owned assets, facilitating joint tourism flows.

Relevance for Pärnu

- Strong year-round model through weather-proof tropical concept.
- Family-oriented, combines wellness and fun.
- Good example of integrating regional assets (skiing, nature) and multi-service ecosystem.
- Shows how investing in thermal water infrastructure and smart programming can stretch seasons.
- Demonstrates how a large attraction can anchor a broader destination brand.

SANDCASTLE WATERPARK (UK)

General Concept

Sandcastle Waterpark is the UK's largest indoor waterpark, located in the seaside resort town of Blackpool. It offers a tropical climate year-round and features over 18 water slides and attractions for all age groups, creating a high-capacity, weather-independent leisure experience.

Key elements:

- Indoor tropical-themed environment with controlled temperature (~28–30°C).
- Mix of thrill slides (e.g. Master Blaster), lazy rivers, wave pools, and toddler splash zones.
- Tiered visitor zones to appeal to both families with small children and teens/adults seeking more excitement.
- Offers accessible facilities and specialized services for visitors with disabilities (awarded for inclusivity).

Economic Model

- Ownership: Operated by Blackpool Council via a wholly-owned company.
- Revenue streams: Entry tickets (time-based + day passes), VIP packages, café/restaurant income, merchandise, group bookings, accessible services.
- Premium "Gold Packages" and private cabana rentals offer higher-margin options.
- Partnerships with hotels, visitor passes, and resort-wide campaigns.



SANDCASTLE WATERPARK (UK)

Visitor flows

- Annual visitor numbers: Pre-COVID ~400,000–500,000 visitors/year.
- Length of visit: 3–5 hours typical; full-day packages popular.
- Target audiences: Primarily families (both local and tourists), school groups, short-stay resort visitors.
- Strong peak-season attendance (summer, holidays), but high off-season usage as well due to indoor design.
- Entirely climate-controlled indoor venue, enabling year-round operation.
- Works as a rainy-day fallback attraction in a weather-dependent resort.
- Heavy focus on holiday calendars: school breaks, long weekends, and themed seasonal promotions (e.g. Halloween, Christmas).
- Collaborations with accommodations and Blackpool tourism boost low-season numbers.

Location & “Spirit of Place”

- Located on Blackpool's iconic promenade — integrates with the town's seaside brand and entertainment heritage.
- Has become a central indoor anchor in a town known for seasonal tourism and unpredictability of UK weather.
- The tropical atmosphere contrasts with the typical local climate — adding exotic appeal.

Mobility & Infrastructure

- Excellent connectivity by rail, car, and regional coach lines.
- Located near central Blackpool transport hubs and major accommodations.
- Well-signposted and integrated with other local attractions like Pleasure Beach and Blackpool Tower.

Relevance for Pärnu

- Shows how an indoor water attraction can operate year-round in a seasonal beach destination.
- Demonstrates integration with city-wide branding and accommodation partners.
- Accessibility, inclusivity, and tiered experience levels are valuable benchmarks.
- Focus on maximizing local weather limitations through immersive design.
- Public-private operational model could inspire stakeholder involvement in Pärnu.

LALANDIA BILLUND (DENMARK)

General concept

Lalandia Billund is a year-round indoor holiday resort centered around Scandinavia's largest indoor water park. It functions as a family destination combining accommodation, leisure, and wellness in one ecosystem.

Key elements:

- Aquadome™: Large tropical indoor waterpark with slides, wave pools, saunas, and kids' areas.
- Holiday homes: Over 800 rental cottages, creating an on-site accommodation ecosystem.
- Indoor plaza: Italian-style streetscape with restaurants, shopping, and activities.
- Additional attractions: Ice skating rink, fitness, bowling, mini-golf, climbing wall, indoor playground.
- Integration with nearby LEGOLAND and Billund Airport.

Economic model

- Privately operated by Parken Sport & Entertainment.
- Revenue streams:
- Accommodation bookings (core business model)
- Waterpark day tickets (external visitors)
- F&B, retail, activity fees
- Year-round package deals
- Efficient cross-selling: guests often stay multiple nights and purchase full access to facilities.



LALANDIA BILLUND (DENMARK)

Visitor flows

- Estimated annual visits: 600,000+
- Primarily family groups (Denmark, Sweden, Germany) with children under 14.
- Average stay: 2–4 nights; longer during holiday periods.
- Visitors often combine Lalandia with LEGOLAND (shared marketing and destination appeal).
- Indoor structure allows stable, year-round visitor flow.
- High peak in summer and school holidays, but strong winter and off-season bookings due to heated facilities and packages.
- Dynamic pricing and event-based programming (e.g. seasonal festivals, themed weekends).

Location & “Spirit of Place”

- Positioned in Billund – Denmark’s “family fun capital”, known for child-friendly innovation and hospitality.
- Lalandia has shaped the town’s identity alongside LEGOLAND and LEGO House.
- Blends local Danish design with a pan-European resort experience.
- The Mediterranean-style indoor plaza creates an immersive “holiday bubble.”

Mobility & Infrastructure

- Walking distance from Billund Airport, a major benefit for international guests.
- Good road access and bus services from Danish cities and German border.
- Seamless connections to LEGOLAND and other family attractions.

Relevance for Pärnu

- Showcases how to create a complete indoor holiday destination that supports overnight stays and local integration.
- Demonstrates synergy between accommodation, water-based activities, and secondary entertainment.
- Offers insight into operational scale and family-focused service design.
- Highlights strong branding and partnerships (e.g. with LEGOLAND).
- Emphasizes destination clustering and building an “ecosystem” of attractions.

PARTILLE ARENA (SWEDEN)

General concept

Partille Arena is a multi-functional event venue located in the Gothenburg metropolitan area. It combines a mid-sized indoor arena (approx. 5,500 capacity) with sports, concerts, community services, and flexible events programming.

Key elements:

- Arena hall: Concerts, elite handball matches, exhibitions, and large public events.
- Sports center: Additional spaces for public sports and fitness activities.
- Culture and meeting hub: Hosts fairs, dance shows, school events, and lectures.
- Located adjacent to Partille shopping and transport center, acting as a local attractor.

Economic model

- Publicly owned by Partille Municipality.
- Operated with a hybrid model combining:
- Commercial rentals (concerts, exhibitions, large-scale events)
- Community and public use (sports clubs, schools)
- Food & beverage during events
- Focus on economic sustainability and civic value, not just profit.



PARTILLE ARENA (SWEDEN)

Visitor flows

- Annual visitation around 200,000–250,000 (varies depending on event calendar).
- Draws both regional day visitors and national event travelers.
- Strong repeat use from local clubs, schools, and organizations.
- Concerts and large events bring spikes of 3,000–5,500 visitors per evening.
- Highly calendar-dependent, but flexible use ensures round-year programming:
- Sports season runs autumn to spring.
- Concerts and fairs fill gaps.
- Community programming adds stability.
- Stronger performance in shoulder and winter seasons, which is rare for event venues.

Location & “Spirit of Place”

- Positioned in central Partille, connected to Gothenburg by public transit.
- Arena is part of the urban development identity, helping define the municipality as a cultural and event city.
- Uses Scandinavian minimalism in design, fitting local values of accessibility and community utility.
- The arena is open to all, from elite sport to school rehearsals.

Mobility & Infrastructure

- Excellent access via commuter trains and buses (15–20 min from Gothenburg).
- Proximity to shopping centers and hotels.
- Easily walkable and integrated into the urban fabric.
- Good parking, but majority of visitors use public transit.

Relevance for Pärnu

- Provides a scalable model of a flexible, mid-sized arena that blends event tourism with local use.
- Demonstrates how to combine public and commercial functions effectively.
- Highlights importance of transportation connectivity for audience flows.
- Could inspire Pärnu to develop multi-use infrastructure that complements seasonality and builds identity.
- Reinforces idea of anchoring an attraction in local culture and everyday life while appealing to broader markets.

HYPE AREENA (FINLAND)

General concept

Hype Areena is a digital entertainment and activity center located in Espoo, Finland. It blends physical sports with digital experiences, gaming, e-sports, and immersive technologies. The concept targets active youth, families, and tech-savvy consumers seeking new-generation entertainment.

Key elements:

- Indoor games combining physical action and digital interfaces (e.g. augmented climbing, interactive trampolines).
- Large e-sports arena and VR/XR gaming zones.
- Spaces for events, parties, and school/youth groups.
- Strong integration of Finnish digital innovation and tech industry partnerships.

Economic model

- Ownership: Privately operated concept backed by Finnish tech and experience industry investors.
- Revenue streams: Entry tickets (time-based), e-sports events, F&B, party & group bookings, sponsorships.
- Experience economy: Pay-per-time use and added value through digital services (e.g. performance data, social sharing).



HYPE AREENA (FINLAND)

Visitor flows

- Visitor volume: No exact public numbers yet; estimated tens of thousands annually during early growth.
- Length of visit: 1–3 hours typical; longer for groups and events.
- Visitor groups: Youth (10–25), families, school groups, companies (team building), e-sports fans.
- Regular traffic enhanced by school holidays, weekends, and e-sports tournaments.
- Fully indoor and weather-independent.
- Seasonal promotions and game updates maintain relevance.
- E-sports and events calendar helps bring repeat visitors and media attention year-round.
- Collaborations with schools and youth services during off-peak periods.

Location & “Spirit of Place”

- Located in Espoo, 30 minutes from Helsinki.
- Leverages Finland's digital identity and youth-friendly innovation brand.
- Built in a converted retail property – adaptive reuse of commercial infrastructure.
- Promotes Finnish values: tech, wellbeing, active lifestyle, family inclusiveness.

Mobility & Infrastructure

- Easily accessible by train from Helsinki and southern Finland (within ~1 hour).
- Located next to a shopping center, with good local services and visibility.
- Regional and national bus/train connections support family and group visits.

Relevance for Pärnu

- Offers a modular, scalable indoor concept suitable for smaller cities.
- Combines tech-forward identity with family and youth experiences.
- Could anchor off-season visitation and fill gaps in indoor offerings.
- Inspiring in terms of brand positioning, partnership with tech/startups, and space reuse.
- Shows potential for low-season programming via events and schools.