

Pärnu – Connectivity Development

FlowHouse value proposition – Transport

2025



PORT
EXPERIENCE

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

Enhancing Pärnu's Regional Accessibility through Multimodal Connectivity

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 such, this report presents not just a transport strategy — but a roadmap for aligning mobility with long-term tourism development, investment and brand positioning.

The following chapters explore how each mode of transport can contribute to improved accessibility and sustainable growth — and how this supports the realisation of Pärnu's wider development vision.



1. Air Connectivity



Pärnu Airport – General Information

ICAO: EEPU; IATA: EPU

Pärnu Airport (EPU/EEPU) is a regional airport located just minutes from the city centre of Pärnu, Estonia's popular summer capital. With a recently upgraded 1,970-metre asphalt runway and ICAO 3C classification, the airport is capable of handling small to medium-sized aircraft, including regional jets and turboprops.

Operated by Tallinn Airport Ltd, Pärnu Airport offers charter, private and seasonal flights, as well as regular connections to Estonia's islands. Its compact terminal, quick access to the city, and customs services (available on request) make it ideal for tourism-driven and business aviation growth.



Location & Operator

Approximately 4–7 km northeast of Pärnu city centre, Estonia. Operator: Tallinn Airport Ltd (AS Tallinna Lennujaam)

Runway & Technical Specifications

- Length & Surface: 1,970 metres × 30 metres, asphalt
- ICAO Aerodrome Reference Code: 3C

Passenger & Traffic operations

- Passenger Volume (2024): 1,097 passengers (+27.8% from 2023)
- Flight Types:
- Charter and private aviation
- Scheduled domestic island routes (e.g. Ruhnu, Kihnu)

Terminal & Border Services

- Terminal: One small terminal handling private, seasonal, and charter operations
- Border Control: Available by prior arrangement (enables limited international arrivals/departures)
- Ground Handling: Basic services (parking, refuelling, crew lounge, ground transport coordination)

Tourism Development in Pärnu Drives Demand for Improved Connectivity

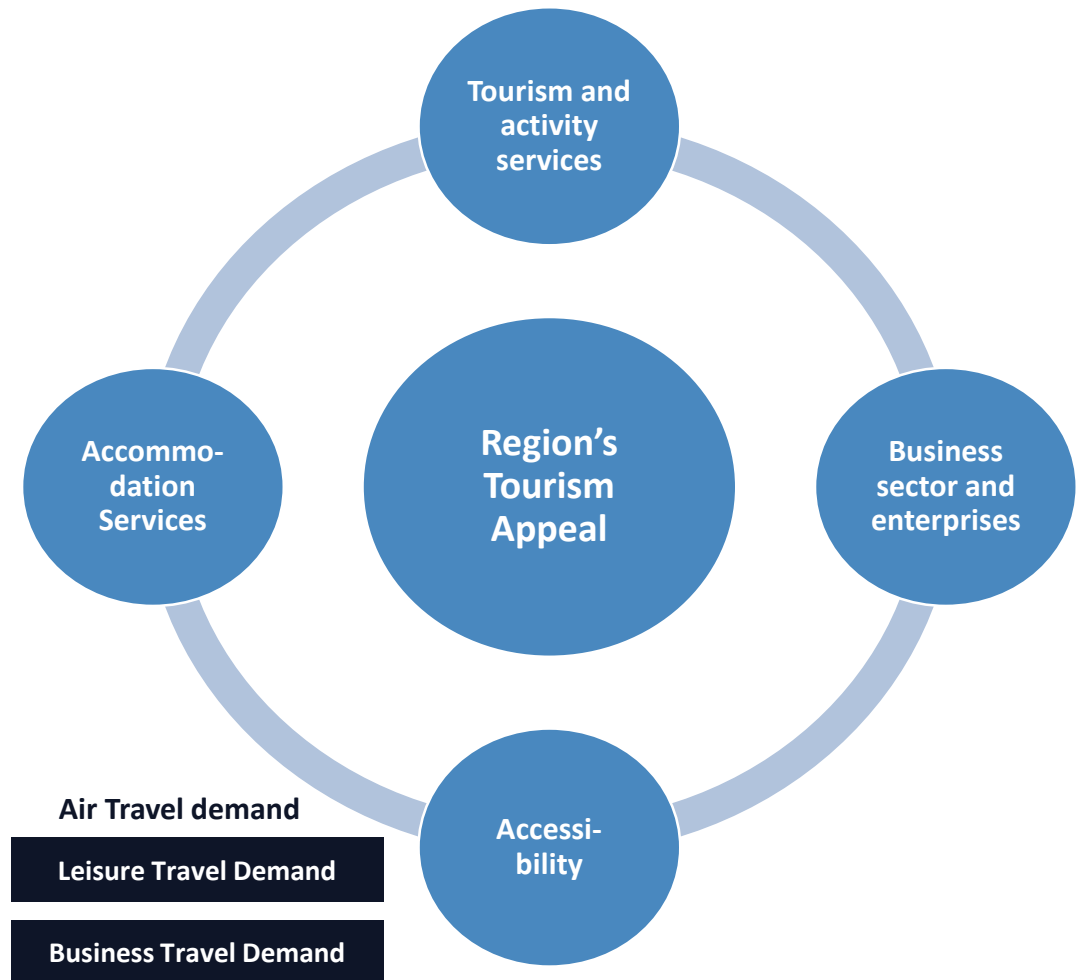
As tourism in Pärnu continues to grow and diversify, so too does the need for enhanced transport connections to support increasing visitor flows. The development of the destination — through expanded accommodation capacity, enriched tourism experiences, improved infrastructure and a dynamic business environment — directly fuels the demand for more frequent and accessible transport links, particularly by air.

In this context, the appeal of the destination itself becomes the most important driver of accessibility and connectivity. A compelling and competitive destination creates reasons for travel — for leisure, events, business or extended stays — which in turn generates passenger volumes that support the launch and growth of air routes and other transport services.

However, a certain baseline level of connectivity must already be in place to ensure that potential visitors can access the destination today. For Pärnu, this means relying on well-functioning international gateways such as Tallinn and Riga airports, both of which are within a 2–2.5-hour transfer range and provide year-round global air access. In addition, road and coach networks, as well as future rail connections through Rail Baltica, enable land-based travel to the region from neighbouring countries and major Baltic cities.

Quality accommodation, engaging activities and dependable services form the foundation of Pärnu's tourism product, while its natural appeal — from seaside leisure to cultural events and wellness tourism — strengthens its position in domestic and international markets. To fully realise this potential, seamless and scalable accessibility must evolve alongside tourism growth.

In short, as Pärnu becomes more attractive, it also needs to become more reachable. This mutual reinforcement between destination appeal and transport accessibility will be central to unlocking long-term, sustainable growth — both for tourism and the wider regional economy.



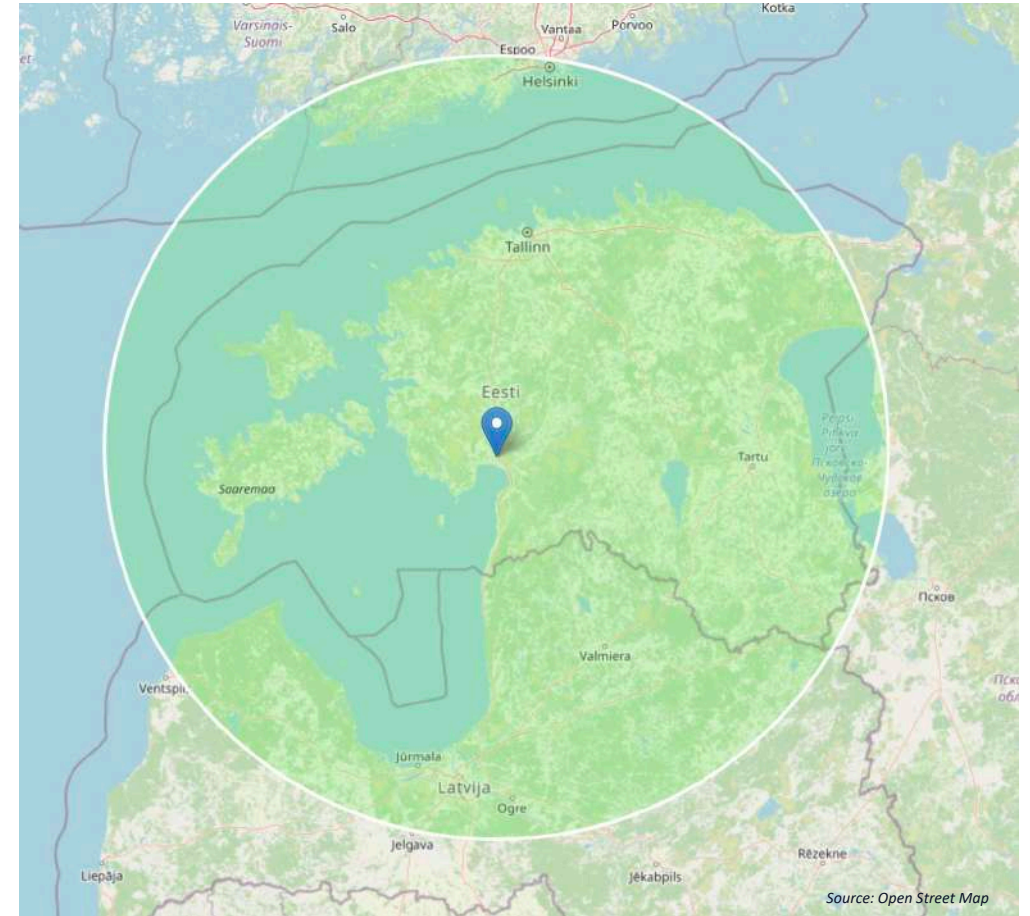
Pärnu Airport's Role Within a Strategic Air Travel Catchment

The 200 km catchment area surrounding Pärnu Airport encompasses a significant part of southern and western Estonia, as well as northern Latvia — including two major international air hubs: Tallinn Airport (TLL) and Riga Airport (RIX). This geographic advantage means that Pärnu lies within easy reach of a wide range of international air connections, which currently provide the backbone of accessibility to and from the region.

Given the close proximity to these larger airports, it is strategically sensible to leverage existing flight networks from Tallinn and Riga in the early phases of regional air service development. This approach ensures immediate international accessibility for inbound tourism and business travel, while laying the groundwork for future, more localised services.

As Pärnu continues to strengthen its position as a year-round destination and visitor numbers grow, the case for launching seasonal charter flights directly from Pärnu Airport becomes stronger — particularly to key leisure markets such as Germany, Finland, or southern Europe. In time, regular regional air services may also become feasible, with potential scheduled routes to destinations such as Stockholm or Copenhagen, operated by smaller regional aircraft.

This step-by-step development model allows for scalable growth in air services aligned with actual demand, while maximising the benefits of existing regional infrastructure. It also positions Pärnu Airport as a flexible, complementary gateway within the broader Baltic air travel network.



Forecasted Growth in Air Passenger Numbers

Pärnu Airport 2027–2030

The table below outlines a possible growth scenario for air passenger numbers at Pärnu Airport between 2027 and 2030. These figures represent an optimistic but realistic trajectory, provided that sufficient resources — both human and financial — are allocated to route development, coordination, and destination marketing. In parallel, the continued development of the destination itself, including tourism products, service capacity, and seasonality management, will play a key role in reaching these targets.

Passenger forecasts for charter flights are based on the assumption of using aircraft with approximately 150 seats, reflecting the operational limits imposed by the current runway length. The figures for scheduled flights assume a 70-seat regional aircraft operating at an average 80% load factor.

In this scenario, charter traffic could gradually increase from 2–8 flights in 2027 (carrying 300–1,200 passengers) to 16–20 flights in 2030 (2,400–3,000 passengers). The introduction of scheduled flights is projected from 2029 onward, initially as a seasonal summer service, with one route estimated to carry 3,360 passengers. By 2030, this service could expand into a year-round scheduled connection, with 1–2 routes generating an estimated 5,600–11,200 passengers annually.

By 2030, the total number of annual flights could reach 17–22, with a cumulative passenger volume of approximately 8,000–14,200. Achieving this level of traffic will require dedicated coordination, stakeholder collaboration, and consistent investment in route promotion and destination appeal.

Flights	2027		2028		2029		2030	
	No of flights	No of passengers	No of flights	No of passengers	No of flights	No of passengers	No of flights	No of passengers
Charter flights	2-8	300-1200	8-10	1200-1500	10-16	1500-2400	16-20	2400-3000
Schedule flights	-	-	-	-	1 (summer season only)	3360	1-2 (year around)	5600-11200
TOTAL	2-8	300-1200	8-10	1200-1500	11-17	4860-5760	17-22	8000-14200

Note: The number of passengers has been calculated as individual visitors for the purpose of assessing regional economic impact. In airport statistics, this figure would typically be counted twice — once as an arrival and once as a departure.

Estimated Economic Impact of Air Traffic in the Pärnu Region (2027–2030)

The table below illustrates the estimated economic impact of air travel to the Pärnu region between 2027 and 2030. The figures are based on earlier passenger forecasts and calculated using the assumption that each visitor stays an average of four days in the region, spending approximately €50 per day. This results in an average total spend of €200 per passenger per trip.

In this calculation, regional economic impact refers to the direct spending of air passengers on local goods and services. This includes accommodation, food and drink, local activities and excursions, shopping, and other on-site expenses such as transport and wellness services. These streams of visitor expenditure directly support local businesses, generate employment, and contribute to the wider regional economy.

According to these projections, the economic impact in 2027 would range between €60,000 and €240,000, increasing steadily as passenger numbers grow. By 2028, the regional benefit is expected to rise to €240,000–€300,000. In 2029, with the introduction of the first scheduled summer route, the impact is projected to reach €972,000–€1,152,000. By 2030, with the addition of year-round scheduled service and expanded charter activity, the total economic impact could reach between €1.6 million and €2.84 million annually.

These estimates underscore the broader value of air connectivity beyond transport itself. As visitor numbers increase, so too does the scale of economic benefit to the region. With each additional flight, accessibility improves, new markets open up, and Pärnu becomes increasingly attractive as a destination for international travellers.

	2027	2028	2029	2030
No of passengers	300-1200	1200-1500	1500-2400	2400-3000
Economic impact to Pärnu region	60 000€-240 000€	240 000€-300 000€	972 000€-1 152 000€	1 600 000€-2 840 000€

Marketing Support as a Tool for Developing Air Connectivity

The launch and development of new air services often requires targeted financial support, particularly in regions where commercial viability is not immediately guaranteed. One of the most commonly used instruments to stimulate new air routes is performance-based marketing support, also known as reciprocal marketing funding. This model is especially relevant when working with airlines or tour operators to initiate charter services or scheduled flights to emerging destinations.

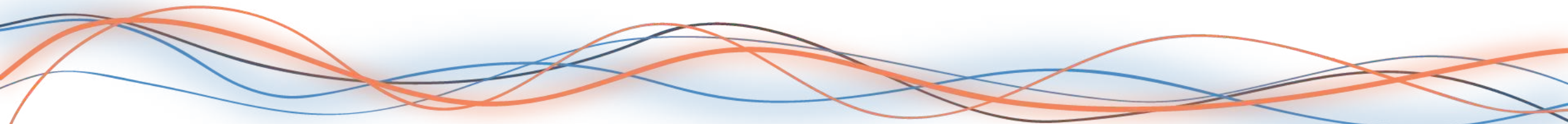
Reciprocal marketing support refers to an arrangement in which the airline or tour operator commits to investing in marketing activities equivalent in value to the support received from the destination. These activities typically promote the destination in relevant source markets and are carried out under a jointly developed marketing plan. The approach lowers the risk for the route operator while increasing visibility and awareness of the destination in key international markets.

Several types of stakeholders can provide such marketing support. Public regional organisations such as development agencies, municipalities, and local business alliances may contribute based on expected economic impact. National tourism boards can also play a role, especially when the new air link aligns with broader tourism strategies or opens access to key markets. In some cases, airport operators may incentivise new routes by offering temporary discounts on airport charges to reduce the operator's fixed costs during the start-up phase.

Additionally, marketing support can be embedded in wider destination development projects, where part of the project budget is reserved for route promotion in cooperation with airline partners. In such cases, it is important that the marketing activities are aligned with the overall project objectives, and that all parties involved formalise their commitments through signed agreements.

Local businesses, such as hotels, attractions and tourism service providers, may also participate in co-funding efforts, especially when the route is expected to bring measurable benefits to specific sectors. Their contributions may be structured proportionally based on size, expected gains or negotiated shares within the local tourism economy. While it can be challenging to coordinate private-sector contributions, such involvement strengthens local ownership and enhances the likelihood of long-term success.

In summary, marketing support is a strategic tool that can help unlock new air connections and increase accessibility for destinations with growth potential. When designed as a shared responsibility between public and private stakeholders, and clearly aligned with market needs, it creates a path toward sustainable route development and stronger international visibility.



Positioning Pärnu for Sustainable Air Connectivity Growth

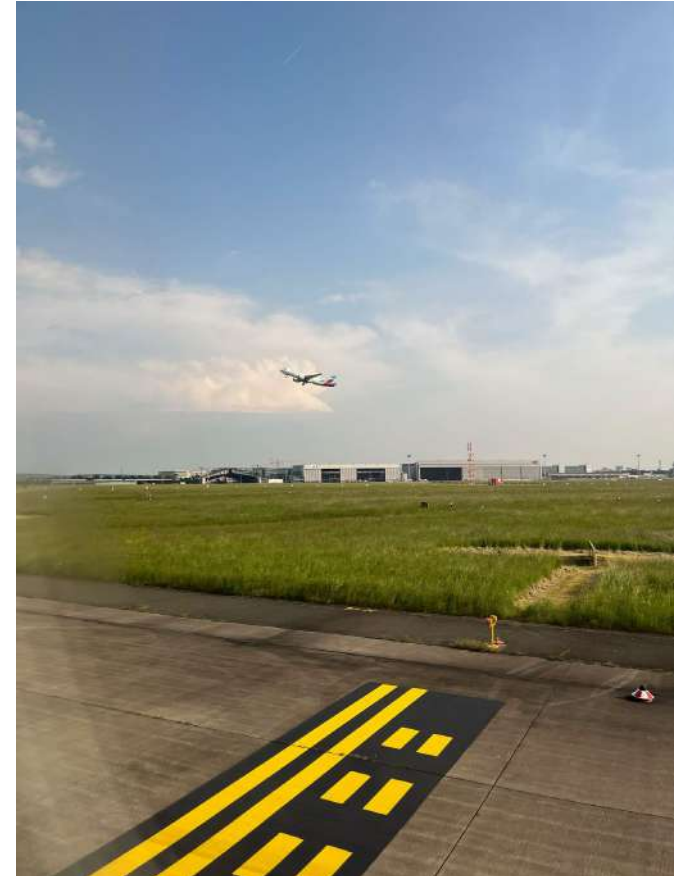
Pärnu's air connectivity development is guided by a strategic framework that aims to improve the region's accessibility, visibility, and long-term competitiveness through carefully phased measures. The goal is to enable the gradual introduction of charter flights and, in the longer term, scheduled air services that are aligned with tourism demand and regional readiness.

At the heart of this effort is the need to build and maintain a strong destination appeal. The attractiveness of Pärnu — as perceived by international travellers, airlines and tour operators — plays a decisive role in whether air services are established and sustained. Therefore, destination development must take place on two levels: effective international marketing to raise awareness, and continuous physical and experiential development of the destination itself. This includes improving accommodation, refining visitor experiences, and enhancing the overall atmosphere and service quality in the region.

The strategy also focuses on establishing and maintaining a strong network of airline and tour operator partners. Active participation in key industry events such as Routes Europe and Connect, as well as close cooperation with Visit Estonia and local entrepreneurs, will be essential in driving interest and concrete route negotiations. Furthermore, the appointment of a dedicated regional contact person for air service development is considered vital for long-term continuity and trust-building with aviation partners.

Ultimately, the success of air connectivity depends not only on flight schedules but on the destination's ability to inspire, deliver and differentiate. Pärnu's unique selling points, seasonal strengths and tourism potential form the foundation for attracting and retaining air links.

The detailed measures and timelines for each focus area are summarised in the action tables on the following page.

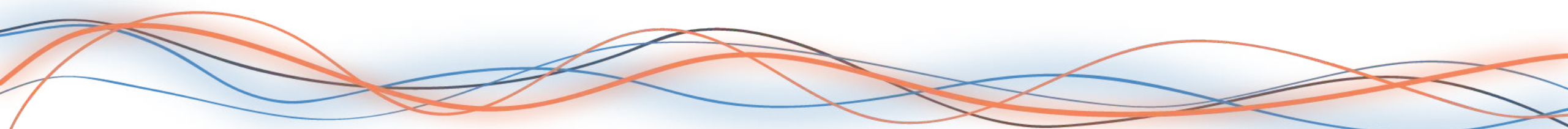


Recommended actions to develop the air connectivity in Pärnu region (1/2)

Category	Actions	High-level timeline
Destination Appeal	Increasing destination awareness <ul style="list-style-type: none"> • Participate in key travel trade and route development events, ie. Routes Europe, Connect Europe • Conduct targeted B2B marketing towards tour operators and travel agents, positioning Pärnu as a potential charter destination (market-specific channel selection required) • Conduct B2C marketing in selected priority markets based on resource availability and demand potential for charter traffic, market ie. DACH markets (Germany) 	Continuous work, trade events from 2026 →
Network Building & Strengthening	Strengthening airline and tour operator cooperation <ul style="list-style-type: none"> • Participate in direct and hosted sales events and workshops (e.g. organised by Visit Estonia or other regional partners) • Maintain direct contact with selected airlines and tour operators • Co-develop travel products with key operators to support charter demand (tour operators) • Create example travel packages for 3-7-night holidays for especially for summer season in the beginning (tour operators) 	From 2025 onwards (after strategy is clarified)
	Building a diverse network of airlines and tour operators <ul style="list-style-type: none"> • Prepare a strategic plan on how to build a network of potential airline and tour operator partners in key source markets • Maintain relationships with existing airline and tour operator contacts according to the strategic plan • Identify potential opportunities and key risks to guide network-building efforts <p>Note. Establishing strong cooperation depends heavily on long-term contact continuity. To ensure this, the region should aim to appoint a dedicated accessibility or air service contact person for consistent follow-up, beyond project-based resourcing.</p>	2025-2026 (after strategy is clarified)

Recommended actions to develop the air connectivity in Pärnu region (2/2)

Category	Actions	High-level timeline
Local Destination & Service Development	Strengthening the destination's overall appeal and highlights <ul style="list-style-type: none">• Identify and further develop Pärnu's key attractions and experiences (e.g. beach, spa, events, nature, culture) that serve as main reasons to travel• Highlight seasonal anchors (e.g. summer events, winter wellness) in route promotion• Ensure alignment of regional development plans with tourism growth goals	2025
	Developing a diverse and high-quality service offering <ul style="list-style-type: none">• Ensure the relevance and development of the region's tourism services in cooperation with local businesses• Provide local companies with insights into international visitor expectations and preferred services	Continuous work
	Improving services required by charter operations <ul style="list-style-type: none">• Involve local entrepreneurs in the co-development of services linked to charter flights• Identify and support key "driver businesses" that can play a leading role in service readiness• Ensure sufficient service capacity and identify future investment needs related to incoming traffic and seasonal peaks	2026 →



2. Road & Rail Connectivity



The Importance of Land-Based Connectivity for Tourism in Pärnu

Land-based transport connections form the backbone of Pärnu's accessibility and are a key enabler of the city's tourism economy. Strategically located along the Via Baltica (E67), Pärnu benefits from its direct position on one of the most important North–South corridors in the Baltic region, linking Finland to Central Europe through Estonia, Latvia, and Poland. This route enables smooth road access from both Tallinn in the north and Riga in the south, making it especially convenient for visitors arriving by car or coach.

In addition to Via Baltica, Pärnu is served by key national roads such as Route 5 and Route 6, which connect the city to northeastern and southern Estonia respectively. These routes also facilitate cross-border travel and domestic tourism from other parts of the country. Local connector roads ensure access to air and sea transport hubs in Tallinn, supporting international visitor flows that arrive via ferry or plane.

For a destination like Pärnu, known for its beaches, spa culture, events, and seasonal tourism, reliable and high-quality land transport is essential. A significant share of tourists—particularly those from neighbouring countries such as Finland, Latvia, and Lithuania—prefer to travel independently by road. Road accessibility enables flexible itineraries, supports day-trips and weekend travel, and makes Pärnu an attractive stop on multi-city Baltic routes.

The future arrival of Rail Baltica will further strengthen land-based access, with high-speed connections to Tallinn and Riga reducing travel times significantly. This will not only support car-free tourism but also create new opportunities for short-stay and international visitors arriving by train.

Investments in roads, signage, mobility services, and station integration will be critical in ensuring that land-based accessibility continues to support tourism growth. For Pärnu, maintaining and improving these connections is not only a transport priority – it is a strategic foundation for developing the destination's competitiveness and sustainability in the years ahead.



Road Networks Enabling Tourism Growth in Pärnu

Pärnu is strategically positioned on Estonia's southwestern coast and enjoys a well-developed road network that connects it effectively with both domestic and international destinations.

The most critical connection is the Via Baltica (E67), route 4, a trans-European transport corridor linking Finland to Central Europe via the Baltics and Poland. This route runs directly through Pärnu, linking it to Tallinn in the north and Riga in the south.

In addition to Via Baltica, several national roads contribute to Pärnu's connectivity:

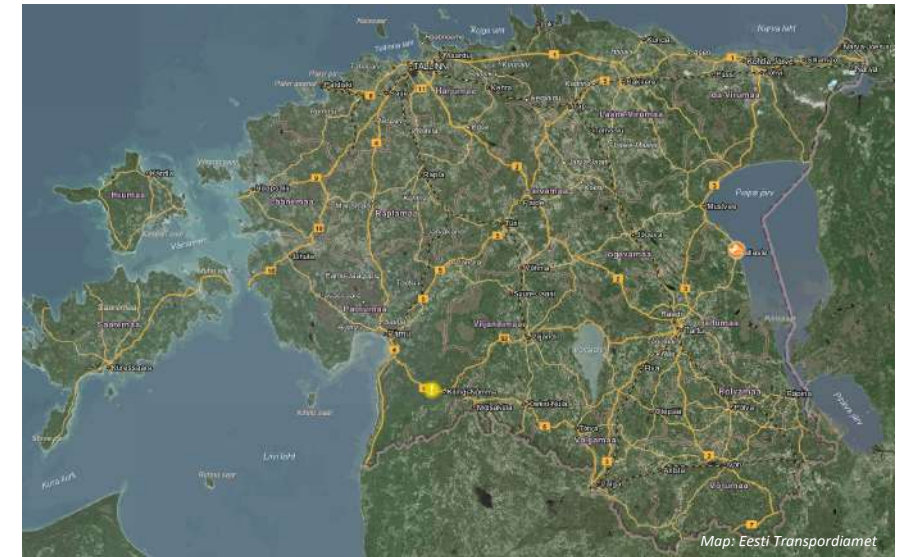
- Route 5 (Pärnu–Rakvere): This route heads northeast from Pärnu through towns such as Vändra, Türi and Paide, ending near Rakvere. It plays a role in linking western and northeastern Estonia, including city of Narva.
- Route 6 (Pärnu–Valga) provides additional connectivity to southern Estonia and the Latvian border.

Local connector roads link Pärnu to ferry terminals and airports in Tallinn, ensuring access to air and sea transport networks.

Road accessibility plays a foundational role in supporting Pärnu's position as one of Estonia's top tourism destinations. A large share of visitors – particularly those from neighbouring countries such as Finland, Latvia, and Lithuania – arrive by car or bus via the Via Baltica corridor. This makes road travel the primary mode of access for independent travellers, family holidaymakers, and tour groups alike.

The ease of access via high-quality road infrastructure supports not only seasonal leisure tourism but also cruise-related excursions, cultural events, and conferences. Direct road access from Tallinn and Riga allows tour operators to include Pärnu in multi-city packages, increasing overnight stays and local economic impact.

In addition, the proximity to the Latvian border facilitates cross-border travel and day-trips, boosting short-stay tourism.



Enhancing Regional Access: Road Infrastructure Upgrades Supporting Pärnu's Growth

Several road infrastructure improvement projects are underway or in planning stages that will enhance Pärnu's connectivity further. The Tallinn–Pärnu section of Via Baltica (E67) is currently being upgraded, with selected segments expanded into a four-lane highway.

These improvements aim to increase traffic safety and reduce congestion, particularly during peak travel periods. In parallel, work on improving the Pärnu bypass is progressing to divert heavy traffic away from the city centre. This will significantly enhance the experience for visitors and residents alike, reducing noise and emissions in popular tourist areas.

Planning is also advancing on intermodal transport connectivity, particularly in preparation for Rail Baltica, which is set to bring high-speed rail service to Pärnu in the coming years. Beyond Estonia, Latvia has recently announced the adoption of private funding mechanisms, including public-private partnerships, to accelerate the southern development of Via Baltica. This cross-border initiative underscores the strategic importance of the E67 corridor as a unified regional artery.

The improved road links will make it easier for tourists to reach Pärnu from multiple directions, including Helsinki via ferry and car through Tallinn, as well as from Riga and other parts of Latvia. In particular, faster and more reliable access to Tallinn and Riga international airports will enable smoother onward travel for international visitors arriving by air.

These enhancements are expected to improve travel efficiency, expand tourism capacity, and reinforce Pärnu's role as a well-connected, accessible coastal destination at the heart of the North–South European transport corridor.



Rail Baltica: A High-Speed Gateway to Pärnu

Pärnu currently lacks direct long-distance passenger rail connections. Until 2018, Pärnu was connected to the Estonian national railway network via a narrow-gauge line, but this service was discontinued due to outdated infrastructure and limited demand. At present, there are no active train services operating to or from Pärnu, and residents and visitors rely primarily on road transport or buses to reach other major Estonian cities or international destinations. The closest operational rail services are available from Tallinn, Tartu, and Riga, which means tourists and business travellers must plan additional transfers to reach the city. This lack of modern rail access has constrained the growth potential of sustainable and high-capacity public transport in the region.

Rail Baltica will reintroduce Pärnu to the international rail network as a key node on the new 1435 mm standard-gauge high-speed railway corridor connecting Tallinn, Riga, Kaunas, Vilnius, and Warsaw. The Pärnu station will be an international stop for high-speed trains and the terminus for regional trains from Tallinn. It is expected to feature up to four platform edges and regional train stabling facilities.

Travel times on Rail Baltica will mark a significant improvement over current possibilities. The projected minimum travel time between Tallinn and Pärnu is approximately 42 minutes, and around 1 hour and 6 minutes from Pärnu to Riga, according to operational modelling. Further optimisation could reduce these times even more, to 40 minutes and 1 hour respectively. In comparison, current road travel times are approximately 1 hour 45 minutes to Tallinn and over 2.5 hours to Riga, depending on traffic.

With Rail Baltica, Pärnu will also gain improved access to major airports, especially Riga International Airport, which is planned to be connected via a dedicated shuttle link. This opens opportunities for international visitors to fly into either Riga or Tallinn and continue to Pärnu via a direct high-speed train.

The current target for completion of the Rail Baltica connection to Pärnu is by the year 2030, in line with the broader Rail Baltica timeline.

As part of the project's success, it is essential to ensure that the new Pärnu railway station is seamlessly connected to the city centre. Convenient and sustainable shuttle transport from the station to central Pärnu must be in place so that arriving travellers can reach hotels, the beach area, or events without the need for a private car—or even a taxi. Ensuring easy local access will play a key role in maximising the benefits of Rail Baltica for tourism and public transport development, supporting Pärnu's shift toward car-free travel experiences.



Recommended actions to develop the road and rail connectivity in Pärnu region

Category	Actions	High-level timeline
Infrastructure Readiness for Tourist Access	Enhance Physical Access and Visitor Mobility <ul style="list-style-type: none"> Improve key access roads from Via Baltica (E67), Route 5, and Route 6 to ensure smooth, safe, and well-signed arrival into Pärnu's central and tourism areas. Upgrade last-mile road infrastructure and pedestrian routes leading to hotels, the beach, and major attractions. Plan for traffic-calmed zones and smart parking solutions during seasonal peaks and events 	2026-2027
	Integrate Rail Baltica into Local Mobility Ecosystem <ul style="list-style-type: none"> Ensure seamless public transport connections from the future Rail Baltica station to Pärnu city centre, beach area, and accommodation zones. Establish a reliable shuttle service and integrate it with long-distance train timetables to avoid the need for taxis or private cars. Provide digital travel information and real-time routing through travel apps and station displays. 	2029 → (once Rail Baltica prepares to be operational)
Strategic Marketing of Pärnu's New Accessibility & Partnerships	Marketing and Communication Activities <ul style="list-style-type: none"> Launch targeted campaigns in Finland, Latvia, and Central Europe highlighting Pärnu's improved accessibility by rail and road. Incorporate travel time comparisons (e.g. Rail Baltica vs. car) into visitor-facing content. Ensure all transport and visitor information is available in multiple languages and integrated into travel planning platforms. 	2026 → (Rail Baltica marketing 2029 →)
	Position Pärnu in Regional and Cross-Border Travel Networks <ul style="list-style-type: none"> Collaborate with national tourism organisations and neighbouring cities to promote Pärnu as a stop on multi-city Baltic travel routes. Create bundled travel and accommodation packages linked to Rail Baltica and long-distance bus routes (e.g. Tallinn–Pärnu–Riga). 	2026 → (Rail Baltica products 2030 →)

3. Cruise Connectivity



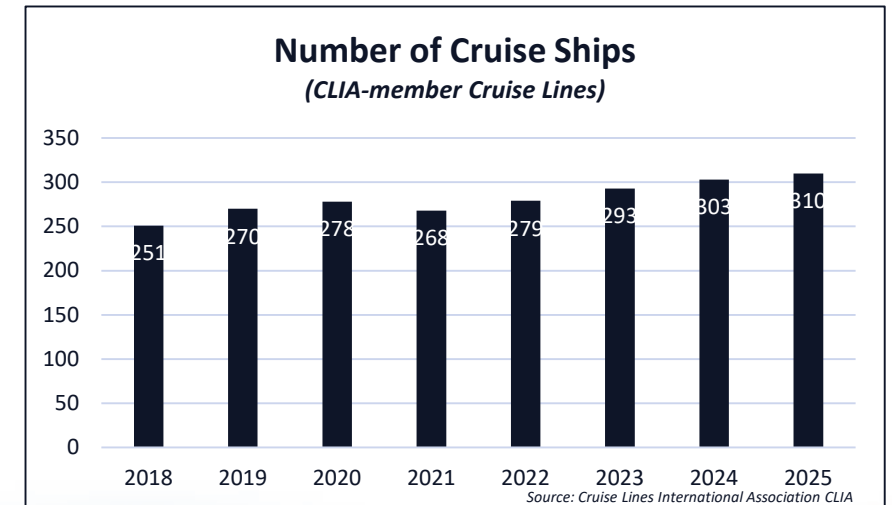
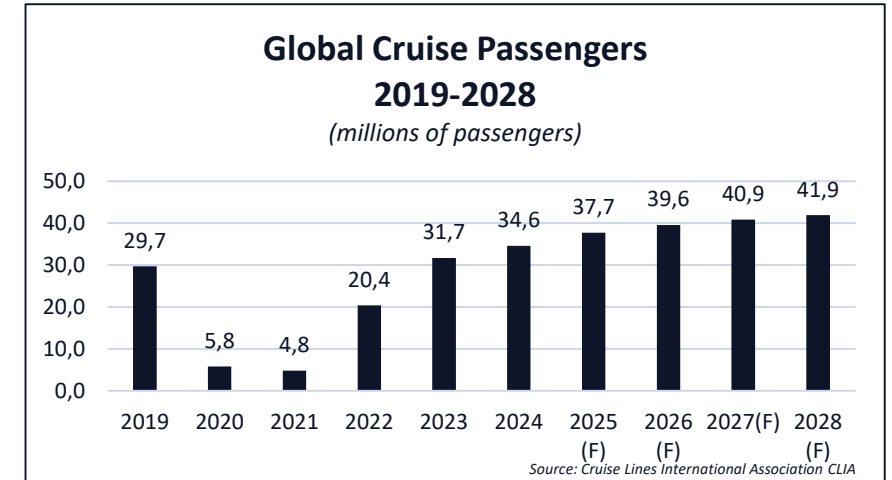
Cruise Tourism Outlook: Global Growth

Cruise tourism has entered a period of sustained global growth, following a strong post-pandemic recovery. According to the **Cruise Lines International Association (CLIA)**, a record **34.6 million cruise passengers** travelled globally in **2024**, surpassing the previous high of 29.7 million recorded in 2019. This upward trajectory is expected to continue, with projections indicating that global passenger numbers could approach **40 million by 2027**. The industry's resilience and renewed popularity reflect a broader shift in traveller preferences toward holidays that combine comfort, safety, and culturally rich experiences.

To meet this growing demand, cruise lines are investing heavily in fleet renewal and expansion. As of early 2024, there are **56 new cruise ships on order** globally, with scheduled deliveries extending through to 2028. These vessels reflect a diversification strategy within the industry: a significant share of the newbuilds are not only large ocean-going ships but also river vessels and expedition-class ships, highlighting the increasing importance of smaller, more destination-focused cruising. Many of these upcoming vessels will incorporate environmentally sustainable technologies, including liquefied natural gas (LNG) propulsion systems and energy-efficient design. This indicates that the cruise industry is not only scaling up, but also shifting towards more responsible and specialised operations.

According to CLIA, **Asia and Oceania** are currently among the fastest-growing cruise markets, driven by increased port infrastructure investment, rising regional wealth, and growing demand for short and mid-length itineraries among first-time cruisers. The **South Pacific** and **Southeast Asia** in particular have shown strong momentum, with new homeport development and market re-entry by global cruise brands. Meanwhile, **South America** and select parts of **Africa** are also seeing renewed deployment, supported by demand for unique destinations and warmer-weather cruising outside traditional peak seasons.

CLIA, which represents over **95% of global ocean-going cruise capacity**, serves as the primary source of cruise industry data and insights. It publishes comprehensive information on passenger trends, fleet developments, economic impact, and sustainability performance—providing strategic intelligence for ports, destinations, policymakers, and operators across the globe.



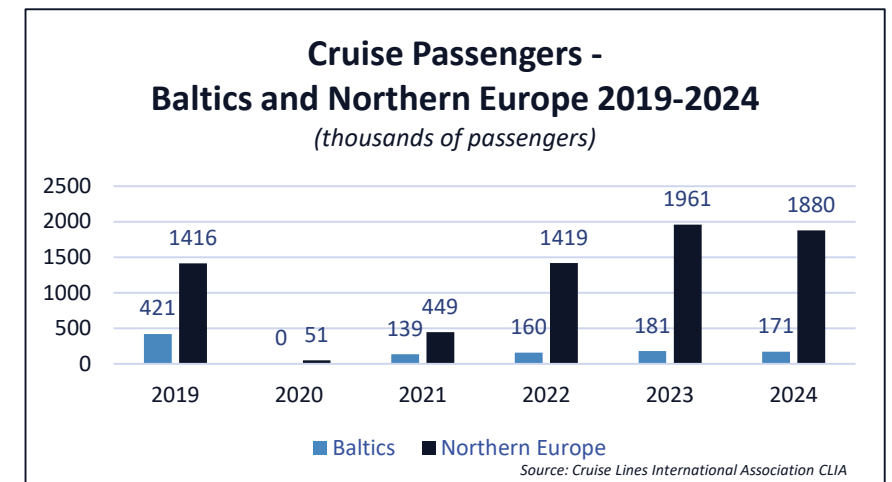
Cruise Industry Growth and the Role of the Baltic Region and Northern Europe

In the **Baltic Sea and Northern European regions**, the cruise market has also shown strong recovery, albeit shaped by regional particularities. In 2023, approximately **1.9 million cruise passengers** visited ports across these areas, an increase of **36% compared to 2022**, when the total was around 1.4 million. Although not yet fully back to pre-pandemic levels, this growth reflects the region's established appeal as a summer cruise destination, characterised by its compact cities, cultural richness, and ease of navigation. The relatively short sailing distances between major ports make the Baltic ideal for one-week itineraries, which remain a popular format among mainstream cruise lines.

Most cruise traffic in the Baltic and Northern Europe consists of **transit calls**, with turnaround operations primarily concentrated in a few larger ports such as Copenhagen, Stockholm, and Helsinki. The ships deployed in the region are mainly from the contemporary and premium segments, offering reliable volume, but there is a notable increase in calls by smaller luxury and expedition vessels, particularly to less frequently visited ports. These segments often cater to high-value passengers seeking authenticity and quieter, less commercial destinations.

Cruise operations in the region are highly **seasonal**, typically limited to the May–September period. This seasonal nature, combined with growing interest in environmental responsibility and quality tourism, presents both challenges and new opportunities. Ports and destinations around the **Gulf of Bothnia**, for instance, may be well positioned to serve the needs of expedition and premium cruise segments. These travellers tend to prefer smaller ships and are attracted to distinctive natural and cultural experiences. Additionally, they typically generate higher per capita spending, making them attractive from a regional economic development perspective—especially for secondary ports with limited capacity.

Looking ahead, continued success in this region will depend on how well destinations align with cruise segment needs. Developing appropriate shore experiences, ensuring logistical readiness, and maintaining sustainability standards will be key in capturing long-term value from this evolving cruise market.



Cruise Passenger Trends: What Travellers Want



Cruise travellers in 2025 are showing a clear and sustained shift in expectations, preferences, and behaviour—shaping how the industry designs its future. According to the Cruise Lines International Association (CLIA), the demand for cruise holidays continues to rise across all demographics, but especially among younger generations and first-time cruisers.

A growing share of passengers seek longer and more meaningful itineraries: nearly half of all cruisers (49%) intend to take a longer voyage than the one they took the previous year. While the average cruise duration stands at 7.1 days, travellers from Europe and Australasia are leading the trend toward extended sailings.

There is a strong appetite for experiential and destination-rich travel. Passengers value the ability to visit multiple locations on one trip, and expect immersive, culturally engaging shore experiences. This is particularly evident in the rise of expedition and exploration cruising, which grew by 22% in 2024 alone, fuelled by demand for remote, nature-based destinations and small-ship formats.

Cruise holidays are also evolving to reflect modern lifestyles. Solo travel is rapidly increasing, with 12% of cruise passengers sailing alone in 2024, double the figure from the previous year. At the same time, multi-generational travel is thriving—28% of passengers report cruising with three to five generations, with Baby Boomers often paying for the entire family experience.

A notable generational shift is taking place: 67% of cruise travellers are Gen X or younger, and 36% are under 40. These younger travellers are particularly enthusiastic about cruising, with strong repeat intent and a growing preference for premium, luxury, and adventure-oriented options. Gen Z and Millennials are also drawn to the cruise format for its combination of structure, flexibility, and perceived value.

As cruise traveller profiles diversify and expectations become more nuanced, the industry is adapting by expanding itinerary options, investing in more personalised experiences, and rethinking ship design to better reflect the needs of tomorrow's passengers. Destinations that can offer cultural depth, natural beauty, and flexible experiences—while supporting sustainable visitor flows—are likely to benefit most in the coming years.

Port of Pärnu – General Information

Port of Pärnu is a historic river-port located in southwest Estonia, operated by AS Pärnu Sadam. Originally a timber and flax export hub, it has transitioned into a modern cargo port with the capacity to accommodate small cruise vessels.

Its cruise infrastructure supports small ships (up to 200 m and 6 m draft), with berths strategically placed near the city centre for convenient shore access. Although ocean cruise visits remain infrequent, the port hosts local excursion vessels and features a well-equipped yacht marina.



- **Location & Operator**
The port spans both sides of the Pärnu River and is operated by AS Pärnu Sadam
- **Cruise Facilities**
Pärnu hosts a small cruise terminal suitable for “Small Cruise Ship” operations, with maximum vessel size limits of 200 m length and 6 m draft. Berths offer direct access close to the city centre—ideal for short calls.
- **Passenger Vessels & Connections**
Regular river and bay boat excursions are available (e.g. to Reiu Bridge), though ocean-going cruise visits remain limited
- **Yacht Marina Features**
The marina offers around 140 berths, including 34 visitor slots for boats up to 16 m long and 3 m draft, with full services like water, power, shower, sauna, repairs and restaurant

Matching Cruise Segments with Destination Readiness

Cruise lines operating globally can be categorised in various ways, depending on their market segment, ship size, and target clientele. A four-tier model—contemporary, premium, luxury, and expedition—can help determine which cruise types are best suited for specific ports and destinations, especially when planning port development or cruise tourism strategy.

Cruise itinerary planning typically takes place two to three years in advance, with large cruise lines publishing deployment schedules and opening bookings up to 24 months before departure. These long planning horizons reflect the strategic complexity involved: cruise lines must consider fleet availability, seasonal sailing windows, homeport logistics, and passenger source markets.

Equally important—particularly in regions like the Baltic Sea—is the strength and appeal of the shore excursion offering. Destinations that are able to provide compelling land-based experiences, including cultural landmarks, natural attractions, and immersive activities, are far more likely to be included in cruise itineraries. For many cruise guests, the value of the cruise is strongly tied to the quality of the destinations visited, making onshore programming a decisive factor in port selection. This is especially true for premium, luxury, and expedition segments, which prioritise enrichment, authenticity, and deeper engagement with local culture.

Ports aiming to attract or retain cruise traffic must therefore not only meet technical and logistical requirements—such as berth capacity, navigational depth, and anchorage options—but also demonstrate that their shore experiences match the expectations of targeted cruise segments.



Cruise Line Segments and Market Positioning

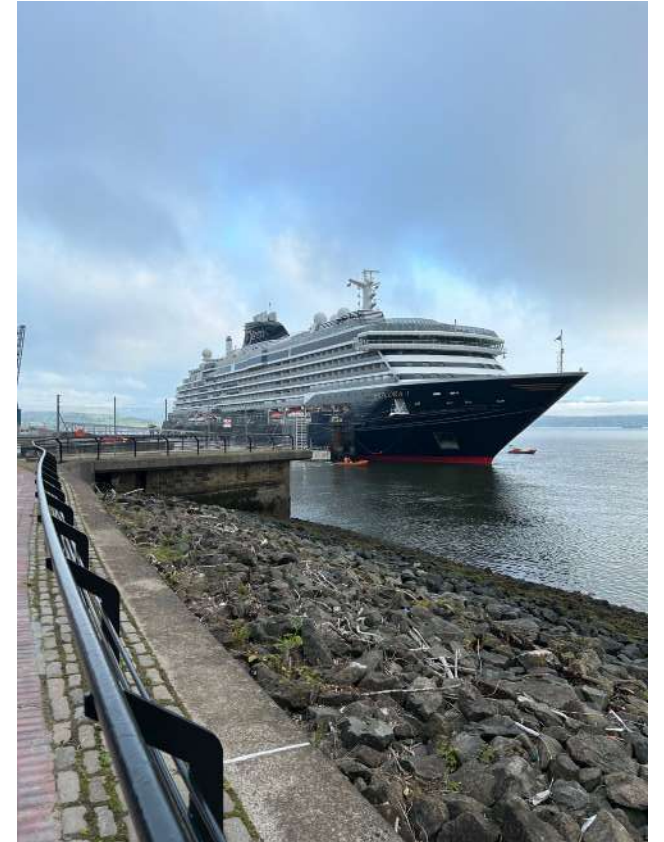
Contemporary cruise lines – This segment includes the world’s largest and most mainstream cruise brands. Their vessels typically carry 2,000 to over 6,000 passengers and focus on high-capacity, family-oriented vacations. These ships are equipped with a wide range of amenities such as theatres, water parks, shopping promenades, and multiple dining options. Contemporary cruises are especially prevalent in the Caribbean, Mediterranean, and Alaskan regions, and they frequently call at large, established ports with robust shore excursion infrastructure.

Premium cruise lines – Premium operators offer a more refined experience with higher service standards, better cuisine, and more spacious accommodations. These ships usually carry between 500 and 1,500 passengers and appeal to couples, retirees, and experienced travellers. Their itineraries include Northern Europe, the Panama Canal, and longer transoceanic crossings, with stops in destinations that may be inaccessible to larger vessels. Guests expect a comfortable and enriching experience, often featuring cultural programming and extended port stays.

Luxury cruise lines – Luxury vessels are generally small to mid-sized and cater to affluent guests seeking exclusivity and all-inclusive services. Passenger counts typically range from 150 to 1,000, and crew-to-guest ratios are often near 1:1. These cruises feature gourmet dining, private excursions, and top-tier accommodations. Routes include world cruises, the South Pacific, Indian Ocean islands, and Antarctica, with a focus on both iconic and remote destinations. Guests expect personalised service, privacy, and unique experiences with minimal crowds.

Expedition cruise lines – These lines combine the high service standards of luxury cruising with a focus on adventure and environmental awareness. Expedition ships are small (usually 50–200 passengers) and ice-rated for travel to remote regions such as the Arctic, Antarctic, and Galápagos Islands. Itineraries feature expert-led excursions, wildlife viewing, and landings by zodiac boats. This segment is expanding beyond polar routes into warmer climates with interest in destinations of historical, geological, or cultural significance. While still niche in terms of volume, it is growing rapidly and appeals to high-value, experience-driven travellers.

Niche cruise lines – These operators serve specific markets or themes, such as sailing ships, cultural immersion, LGBTQ+ travel, or river cruising. Ships are typically small and destinations highly curated. While passenger numbers are limited, niche cruises can offer strong alignment with regional identity or specialized tourism products.



Cruise Line Categories: Key Characteristics, Regions, and Operators

Cruise line type	Description	Key Features	Typical Cruise Regions	Example Cruise Lines
Contemporary Cruise Lines	Contemporary cruise lines offer mainstream, family-friendly vacations with a wide range of activities, entertainment, and large ships. They cater to a broad market, often focusing on affordability and high-capacity travel	<ul style="list-style-type: none">Large ships with thousands of passengers, usually 2,000-7,000 passengersCasual dining with many different options, Broadway-style shows, water parksGeared towards families, couples, and first-time cruisers	<ul style="list-style-type: none">Caribbean (Eastern, Western, Southern)BahamasMediterraneanAlaska (Summer)Mexican RivieraBermuda	<ul style="list-style-type: none">Royal Caribbean InternationalCarnival Cruise LineNorwegian Cruise LineMSC Cruises
Premium Cruise Lines	Premium cruise lines provide a step up in service, dining, and accommodations. They offer more refined experiences, longer itineraries, and typically attract a slightly older or more seasoned traveller.	<ul style="list-style-type: none">Smaller ships, typically for 500-1,500 passengersMore spacious cabins, better cuisine, fewer crowdsSophisticated entertainment and enrichment programsMore varied itineraries and destinations	<ul style="list-style-type: none">Mediterranean (Greece, Italy, Spain)Caribbean destinationsNorthern Europe (Norwegian fjords, Baltic capitals)AlaskaPanama CanalSouth AmericaTransatlantic voyages	<ul style="list-style-type: none">Oceania CruisesAzamaraViking Ocean Cruises
Luxury Cruise Lines	Luxury cruise lines offer high-end, all-inclusive experiences with top-tier service, fine dining, and elegant accommodations. Ships are smaller and cater to affluent travellers seeking exclusivity and comfort.	<ul style="list-style-type: none">Ships typically carry 500-1,000 passengersGourmet dining, spacious suites, butler servicePersonalized experiences and shore excursionsFewer passengers, more crew per guest	<ul style="list-style-type: none">World Cruises (multi-month itineraries)South Pacific (Tahiti, Fiji)Indian Ocean & SeychellesMediterranean & AdriaticCaribbeanAntarctica & Arctic (luxury expedition)Southeast Asia	<ul style="list-style-type: none">Regent Seven Seas CruisesSeabournSilversea CruisesExplora Journeys
Expedition & Niche Cruise Lines	<p>Expedition cruises focus on adventure and exploration, sailing to remote and environmentally sensitive areas with expert-led excursions and a strong emphasis on ecological responsibility.</p> <p>Niche cruise lines focus on unique themes, specific passenger demographics, or highly specialized destinations. They often provide unusual experiences or culturally immersive itineraries.</p>	<ul style="list-style-type: none">Small ships, usually between 50-200 passengersEducational programs, naturalist guidesZodiac landings, wildlife viewingDestinations unreachable by larger shipsSmall ships or riverboatsThemed cruises (e.g., wine, music, LGBTQ+, wellness)Focus on specific interests or regions	<ul style="list-style-type: none">AntarcticaArctic (Greenland, Svalbard, Northwest Passage)Galápagos IslandsAmazon RiverPatagonia & Chilean fjordsSouth Georgia & Falklands	<ul style="list-style-type: none">Lindblad ExpeditionsHurtigruten ExpeditionsAurora ExpeditionsSwan HellenicPonantViking Cruises (river & ocean, cultural focus)Star Clippers (tall sailing ships)

Positioning Pärnu for Premium, Luxury and Expedition Cruises

When planning cruise line engagement and negotiations, it is important to take into account the operator's product offering, geographical scope, and vessel size. From the destination's perspective, a key consideration is the type of cruise tourism one aims to attract. This includes technical factors such as the dimensions and depth of port channels and berths, the location and feasibility of anchorage zones, and the capacity of the local tourism infrastructure. Equally important is an assessment of which tourism products already exist—or are under development—that could appeal to cruise passengers.

In the case of Pärnu, one physical constraint is the port's vessel size limit, which restricts maximum ship length to 200 metres. This reduces the number of potential cruise lines and ships able to dock directly. However, should formal anchorage possibilities be established in nearby waters, this limitation could be partially overcome. Beyond technical specifications, it is crucial to assess the quality, readiness, and scalability of local tourism services. While this can be evaluated in various ways, a stopover by a vessel carrying 3,000–5,000 passengers could present capacity challenges, which merit further assessment. Additionally, Pärnu's current tourism offering is geared more towards small-group, experiential travel, which may not be easily scalable to meet high-volume demand.

It appears that Pärnu and its port are best suited to welcoming premium, luxury, and expedition cruise segments. These vessels are smaller in size, and their passengers typically seek the type of authentic and nature-based experiences that Pärnu is well placed to deliver. It is also worth noting that most cruise itineraries feature four to six destinations across a week. Therefore, the Visit Arctic Coast region, areas along the Swedish coast, and select Finnish ports could together create an attractive and marketable route for cruise lines.

From a sustainability perspective, smaller vessels better support long-term tourism development, both environmentally and socially—especially in destinations closely tied to natural surroundings. They are also more likely to be accepted by local communities than mega-ships. While smaller vessels do not bring the same passenger volumes, they often generate higher per-guest revenues for local service providers, making them economically attractive despite lower footfall.



Optimising Pärnu's Appeal as a Day-Call Port in Northern Europe

Pärnu currently functions as a day-call port, with cruise berths capable of accommodating vessels up to 200 metres in length. While this restricts access for large contemporary cruise ships, it makes Pärnu a suitable stop for smaller and mid-sized vessels operated by premium, luxury, and expedition cruise lines. These segments are growing steadily in the Baltic region and are known to favour culturally rich, compact destinations that offer distinctive shore experiences.

Becoming a turnaround port would require significant international air connectivity, which at present is not feasible. Ports such as Tallinn, Helsinki, Stockholm, and Copenhagen continue to serve this function, with well-developed airport infrastructure and frequent international flights. Although small-scale, charter-based operations through Pärnu airport may occasionally be possible for boutique or expedition cruises, this is not a strategic focus recommended at this stage.

The broader Baltic Sea region—defined here as encompassing cruise ports from northern Sweden to southern Norway and Denmark—is projected to see strong growth in 2025. According to Cruise Baltic, the number of cruise calls is expected to increase by 10.1% year-on-year, following a 2.8% decline in 2024. Similarly, cruise passenger numbers are forecast to rise by 8.5% in 2025, reaching approximately 4.8 million passengers across the region. These figures reflect a healthy rebound and underline the importance of positioning ports like Pärnu to benefit from this trend.

Success in attracting day-call visits depends heavily on the quality and uniqueness of onshore offerings. Cruise guests, particularly those travelling on premium and expedition vessels, place high value on authentic, engaging experiences. For Pärnu, this includes everything from guided tours through the historic town centre and visits to nearby wineries, to wellness-focused spa sessions and access to coastal nature. Because many Baltic cruise itineraries include multiple destinations, the perceived value of each stop is strongly tied to the strength of the local excursion product.

For itinerary planners, Pärnu's distinctive cultural identity, relaxed atmosphere, and potential for curated shore programmes make it a compelling day-call option—especially as demand grows for small-port experiences and sustainable cruise tourism in Northern Europe.



Strengthening Pärnu's Visibility and Integration in the Baltic Cruise Market

To maximise its visibility and reach within the cruise sector, Pärnu should consider joining the Cruise Baltic marketing community—a regional collaboration platform uniting ports across the Baltic Sea. Membership would allow Pärnu to cooperate with other small and mid-sized destinations to develop attractive multi-port itineraries, such as seven-night cruise programmes tailored for niche markets. This coordinated approach would support cruise lines in their itinerary planning and provide a clearer overview of the region's diverse offerings.

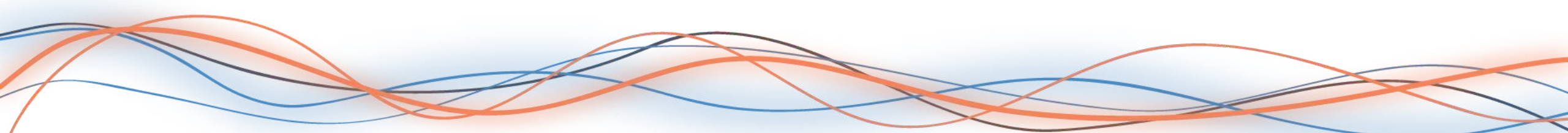
In order to capitalise on this potential, targeted marketing and outreach activities are essential. Pärnu should position itself as a niche, culturally distinctive day-call destination, particularly appealing to cruise lines already operating in the Baltic Sea, as well as those seeking new, less conventional ports of call for vessels under 200 metres in length. Relevant operators include:

- Ponant – luxury expedition-style cruises with small ships
- Seabourn and Silversea – high-end cruise brands offering culturally rich itineraries
- Hurtigruten Expeditions and Lindblad Expeditions – small expedition cruise operators focused on sustainability and discovery
- Swan Hellenic – boutique cultural voyages across Northern Europe

These lines are known for serving high-value passengers who prioritise authenticity, intimacy, and meaningful engagement with destinations. Their fleet sizes are also well-suited to Pärnu's current port infrastructure. Several of these operators have already called in Pärnu in previous seasons, making them strong candidates for renewed engagement—particularly through participation in cruise industry events, direct outreach, and regular updates on new shore excursion development or port enhancements.

In addition, should Pärnu wish to attract larger cruise vessels beyond the current port capacity, the potential for anchoring offshore and tendering passengers ashore should be further explored. This would require identifying suitable anchorage zones along the coastline and ensuring the availability of safe and efficient tender boat operations—either via the cruise line's own boats or local service providers. In such cases, destination appeal becomes even more important. Beyond excursions, Pärnu's extensive beach and developing service infrastructure could be positioned as a key draw—offering a Northern European "Golden Beach" experience.

In conclusion, Pärnu's strategic opportunity lies in consolidating its role as a sustainable, high-quality day-call destination within the Northern European cruise circuit. By aligning local offerings with the operational requirements and guest expectations of targeted cruise lines—and by actively participating in regional cooperation initiatives such as Cruise Baltic—Pärnu can significantly improve its visibility in itinerary planning, grow its cruise call volume, and strengthen its position as a valuable coastal destination in the Baltic Sea.



Economic Impact of Cruise Visits

Cruise tourism contributes significantly to local economies, with passenger spending varying notably depending on whether the port is a regular port call or a turnaround port. According to CLIA data, passengers visiting during a standard port call spend on average €90–110 per person, primarily on guided excursions, food and beverages, shopping, and local transportation. This level of spending is typical for destinations such as Pärnu, which currently operates as a day-call port.

In contrast, turnaround ports—where cruise itineraries begin or end—generate considerably higher spending per passenger, averaging between €320–370 per person due to the need for accommodation, transfers, and extended stays. However, due to Pärnu’s limited air connectivity, its focus should remain on maximising revenue from day-call visits. This can be achieved by enhancing shore excursion offerings, encouraging local spending, and promoting distinctive, culturally immersive experiences for premium and expedition cruise guests.

Based on a projected average spend of €90 per passenger, Pärnu’s annual cruise-related income could start at approximately €160,000 in the early stages and grow to nearly €500,000 by 2030. These estimates are based on a moderate increase in cruise calls—rising from just a few per season to as many as two per week during peak summer months. The potential for off-season visits, such as winter cruises, will depend on the development of appealing year-round tourism products.

While individual passenger spending is lower at port-of-call destinations, the cumulative impact—especially when scaled with growing cruise volumes—offers a significant opportunity for sustainable local economic benefit. Strengthening Pärnu’s role in Baltic cruise itineraries could thus provide steady revenue growth through targeted, experience-based tourism.

Pärnu’s port estimated growth potential

	2027	2028	2029	2030
No of port of calls	6	10	14	18
No of passengers	1800	3000	4200	5400
Local income estimation	162 000 €	270 000 €	378 000 €	486 000 €

The calculations are based on an average of 300 cruise guests disembarking in Pärnu during each port call, acknowledging that while ships may carry a higher number of passengers, not all guests go ashore.

Development Path for Cruise Tourism in Pärnu

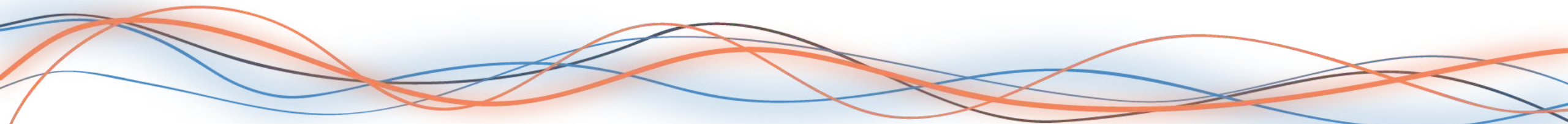
The development of cruise tourism in Pärnu is based on long-term, coordinated work that supports sustainable growth, regional cooperation, and positive local impact. Recognising its potential as a culturally distinctive and compact destination, Pärnu is aiming to strengthen its position as a niche day-call port, particularly for premium, luxury, and expedition cruise lines operating vessels under 200 metres in length.

Initial focus is placed on enhancing the visitor experience through high-quality shore excursions, authentic cultural and nature-based activities, and the promotion of Pärnu's unique assets such as its historic centre, coastal landscapes, and wellness services. Close collaboration with cruise lines, local operators, and neighbouring ports will be essential to secure inclusion in itineraries and build lasting partnerships.

Infrastructure improvements, including safe and efficient passenger flows, support for tender operations, and sustainable port services, are a key part of ongoing work. At the same time, efforts will be made to ensure that environmental and social responsibility is embedded in all aspects of the cruise offering—from low-emission operations and nature conservation to local sourcing and fair employment practices.

Developing cruise tourism in Pärnu is not a one-off project, but a continuous process of investment, cooperation, and communication. Strengthening connections with international networks such as Cruise Baltic and maintaining dialogue with cruise lines already familiar with the destination will support Pärnu's visibility and competitiveness in the Baltic Sea region.

The tables on the following pages outline the key actions and proposed timelines that guide this long-term development.

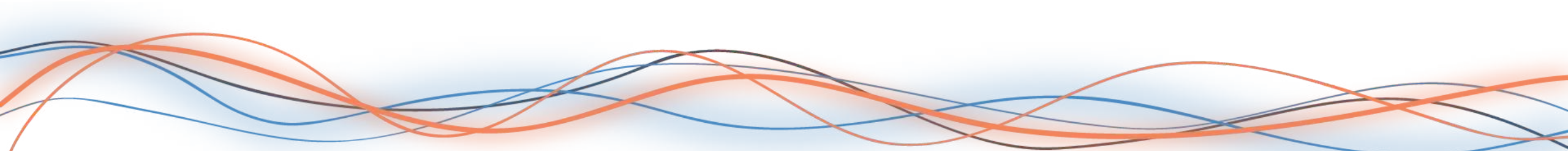


Recommended actions to develop the cruise business in Pärnu region (1/2)

Category	Actions	High-level timeline
Strategic Positioning as a Niche Day-Call Destination	Focus on small and mid-sized cruise ships (max. 200 m in length), particularly in the premium, luxury, and expedition segments. At the same time study and review, if larger ships can be handled in the future.	2025-2026
	Emphasise authentic, culturally rich visitor experiences to stand out among Baltic destinations.	Continuous work
	Highlight strengths such as Pärnu's historic centre, natural coastline, wellness offerings, and relaxed atmosphere.	
Enhancing Shore Excursion Offerings	Develop high-quality, small-group excursions tailored to the interests of premium and expedition guests.	Continuous work, start in 2025
	Collaborate with local operators to create sustainable, immersive, and seasonally varied programmes.	
	Design excursions that are accessible year-round to support winter cruise opportunities, where feasible.	2026 →
Strengthening Marketing and Cruise Line Relations	Participate in international cruise trade fairs, ie. Seatrade Europe and Global, also joint participation with Cruise Baltic is an option	2026 →
	Join the Cruise Baltic network to strengthen regional cooperation and itinerary inclusion	2025
	Maintain active communication with cruise lines that have previously visited Pärnu.	2026-2027, relation building continuous work
	Conduct targeted outreach to cruise lines already operating in the Baltic with smaller vessels	

Recommended actions to develop the cruise business in Pärnu region (2/2)

Category	Actions	High-level timeline
Infrastructure and Service Improvements	Maintain and improve port infrastructure to meet cruise-specific standards: <ul style="list-style-type: none">• Ensure safe, accessible, and efficient passenger movement.• Plan for tender boat operations if anchorage options are to be offered.	2025-2027
	Invest in sustainable port operations: <ul style="list-style-type: none">• Shore power, waste reception facilities, alternative fuels compatibility, and low-emission equipment.	Future development, business decision later
Promoting Environmental and Social Responsibility	Implement a sustainability strategy in cooperation with port, city, and tour operators.	2026-2027
	Ensure environmentally friendly tourism practices, such as respecting natural sites, waste reduction, and emissions control.	
	Promote local hiring, fair working conditions, and local sourcing of services to support the community.	
Governance and Collaboration	Establish a local cruise coordination team involving port authorities, the city, tourism bodies, and local businesses.	2025
	Develop shared goals, monitor sustainability indicators, and regularly update cruise stakeholders.	2026
	Promote joint regional itineraries with other small Baltic ports to strengthen Pärnu's relevance.	2026 →



4. Summary & Conclusions



Multimodal Access Overview for Key Development Concepts

	PÄRNU BEACH HALL – ETERNAL SUMMER BY THE SEA	PÄRNU FLOWPARK – THE ADAPTIVE ARENA OF CULTURE, SPORTS & EVENTS	PÄRNU PLAYScape – MODULAR DESTINATION DISTRICT
Air connectivity <ul style="list-style-type: none"> - Pärnu Airport - Tallinn Airport (1:45h by car) - Riga Airport (2:30h by car) 	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 <ul style="list-style-type: none"> - 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 <ul style="list-style-type: none"> - 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 <ul style="list-style-type: none"> - 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.



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.



More information

Port Experience

Timo Rissanen

+358 44 722 1313

timo.rissanen@portexperience.fi

www.portexperience.fi

Y-tunnus 3361131-8

PORT
EXPERIENCE

