

Pärnu Tourism Attraction Study

flowhouse



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1. Introduction

1.1 Purpose of the Study

The purpose of this study is to develop a compelling, insight-based value proposition for establishing a year-round tourism attraction hub in Pärnu County.

This assignment stems directly from the Pärnu Tourist Destination Strategy 2025–2029, which identifies three key challenges for Pärnu as an international travel destination:

- Strong seasonality that limits sustainable growth and profitability
- The need to strengthen existing markets and discover new ones
- The importance of ensuring balanced tourism development across the county

The proposed solution, endorsed by both regional and local development strategies, is to create an innovative and environmentally conscious tourism hub that reflects Pärnu's identity as the Summer Capital, but operates successfully across all seasons.

This study aims to:

- Provide strategic foundations for business and investment proposals targeted at both domestic and international investors
- Support the efforts of Pärnu County Development Centre, local municipalities, and Destination Pärnu in identifying, evaluating, and promoting concrete development opportunities
- Ensure that the future attraction aligns with market demand, regional strengths, sustainability principles, and visitor expectations

The outcome will not be a ready-made concept but a well-substantiated, competitive and context-sensitive value proposition that enables the next phase: the business and spatial development of a new anchor attraction for Pärnu County.

1.2 Background: Pärnu Tourist Destination Strategy 2025–2029

The foundation for this study is the Pärnu Tourist Destination Strategy 2025–2029, which was developed in collaboration with local stakeholders to provide long-term direction for the sustainable development of tourism in Pärnu County.

The core goal of the strategy is to extend the tourism season and reduce dependence on peak summer months. This ambition is reflected in key indicators, such as:

- Increasing the share of overnight stays during the off-season (currently 59% in 2023)
- Growing the number of overnight stays in May and September

- Increasing the number of international events held during the off-season

The strategy is structured around five strategic challenges, each with development directions, responsible actors, and indicators:

1. Reducing Seasonality
2. Developing Existing and Potential Target Markets
3. Promoting Balanced Regional Growth
4. Engaging the Community and Strengthening the Sector's Reputation
5. Ensuring Continuity and Consistency in Strategic Governance

Pärnu is recognized as Estonia's Summer Capital and holds significant potential for year-round development, supported by:

- Its coastal and riverfront landscapes
- Cultural heritage (including a UNESCO-listed tradition)
- Existing and planned infrastructure (e.g., Rail Baltic, airport)
- A growing profile in sustainable tourism (e.g., Green Destination silver level in 2023)

To reach its goals, the strategy calls for targeted investments in:

- High-quality tourism products and signature events
- Culinary and wellness experiences
- Niche tourism and MICE (meetings, incentives, conferences, exhibitions) segments
- Strengthening digital visibility and international marketing

This study builds upon the strategy's vision and metrics, serving as a bridge toward identifying, evaluating, and promoting a new anchor attraction that supports year-round visitation.

1.3 Methodology and Data Sources

This study applies a multi-method approach combining qualitative and quantitative data to ensure a comprehensive understanding of the tourism landscape and development opportunities for Pärnu. The methodology includes the following key elements:

- **Desk Research:** A systematic review and synthesis of previous studies, regional strategies, market reports, and statistical data was conducted. These include

national and European tourism trend reports, consumer behavior analyses, and relevant strategic documents such as the *Pärnu County Tourist Destination Strategy 2025–2029* and Estonian travel statistics.

- **Benchmarking Analysis:** International and regional tourism attraction concepts were analyzed to identify relevant reference cases. These benchmarks provide insight into best practices and successful models in year-round tourism development, visitor experience design, and destination competitiveness.
- **Stakeholder Survey:** A dedicated online survey was carried out using the Howspace platform to engage tourism stakeholders in the Pärnu region. The survey collected insights on current strengths and weaknesses, perceptions of target markets, customer segments, service development needs, and strategic priorities.
- **Market Insights:** Country-specific market profiles (Finland, Sweden, Germany) were developed based on current trend data, travel behavior research, and industry reports. These profiles help identify opportunities, motivators, and demand patterns across key source markets.
- **Trend Analysis:** Emerging travel trends and demand shifts were examined using a broad collection of international sources, including ETC reports, Visit Finland and Visit Estonia data, GWI and Globetrender insights, and innovation and future tourism trend studies.

This triangulated approach allows for a robust foundation for strategic recommendations and the identification of viable concepts for sustainable tourism development in Pärnu.

2. Pärnu Tourism Opportunities and Challenges

Pärnu County holds a strong position in Estonia's tourism landscape. While the city of Pärnu is best known as a popular summer destination, the region's appeal extends beyond the beach season. Its rich combination of natural assets, spa heritage, cultural events, and family-friendly services provides a solid foundation for year-round tourism development.

However, as global travel trends evolve and competition between destinations intensifies, it is essential to critically assess both the current strengths and the structural or strategic challenges that may hinder future growth. This chapter explores the key opportunities and challenges shaping the future of tourism in Pärnu County and sets the stage for concept development work.

2.1 Existing Tourism Opportunities and Infrastructure

Pärnu County is one of Estonia's leading tourism regions, anchored by the city of Pärnu, a well-known domestic and international summer destination. The destination's tourism offering is multifaceted and reflects a long-standing tradition in wellness, coastal leisure, events, and family tourism.

This section provides an overview of the existing tourism supply and infrastructure, based on national tourism databases, previous analyses, and the materials used in the preparation of the *Pärnu Tourist Destination Strategy 2025–2029*.

Pärnu's core offering is built on:

- Spa and wellness tourism, rooted in 19th-century traditions
- Beach and maritime activities during the summer season
- Festivals and events, such as Weekend Festival, Pärnu Film Festival, and Hanseatic Days
- Nature-based experiences, including Soomaa National Park and the coastal hiking routes
- Family tourism, with attractions like Lottemaa Theme Park

Additional opportunities exist in cultural tourism, niche events, and emerging wellness trends (e.g. saunas, cold therapy, silence retreats).

Accommodation and Service Infrastructure

- Pärnu County has over 6,000 registered beds in various types of accommodation, with high occupancy concentrated in the summer months

- The city offers a range of hotels, guesthouses, camping areas, and spas, many of which operate year-round
- Dining and local food play a growing role, with Pärnu also positioning itself as a culinary destination
- Visitor services, such as guided tours and information points, are well-developed in the city but less present in rural areas

Events and Cultural Infrastructure

- Pärnu is home to multiple performance venues, galleries, museums, and outdoor spaces that host regular cultural programming
- However, most events are seasonally concentrated, and the lack of indoor, weather-proof venues limits year-round visitor flow

Mobility and Accessibility

- The region is well connected by road (Via Baltica) and has a developing rail connection (Rail Baltic under construction)
- Pärnu Airport offers limited services; a cruise port and marinas support maritime traffic
- Public transport coverage and connections to rural areas remain a challenge for dispersing visitors beyond the city

Strategic Projects and Development Initiatives

- The region has launched several initiatives to enhance year-round appeal, including the Winter Capital campaign, cultural route development, and support for sustainable tourism certification
- Ongoing investment in mobility infrastructure (Rail Baltic, improved connections) is expected to enhance accessibility in the coming years
- There is increasing interest in renewable energy, sustainable construction, and digital tools in tourism service development

While Pärnu has a strong tourism foundation, the current offering is highly seasonal, with infrastructure and services optimized for the summer. There is an evident need and opportunity to diversify experiences, activate rural areas, and create new year-round demand drivers that align with visitor expectations, regional identity, and sustainable growth.

2.2 Analysis of the Effects of Seasonality and Current Bottlenecks

Tourism in Pärnu remains strongly concentrated in the summer season, particularly from June to August. According to national tourism statistics and the Pärnu Destination Strategy:

- Approximately 41% of all overnight stays occur in July and August alone
- The off-season (October–April) accounts for only around 25% of annual overnight stays
- Domestic tourism remains more stable year-round, while international travel is even more summer-centric

The region's identity as the Summer Capital of Estonia has supported strong brand awareness but also reinforced a pattern of high season dependency.

The effects of this seasonal imbalance include:

- Fluctuating income for tourism businesses, affecting viability and year-round employment
- Underutilization of infrastructure and public services outside peak months
- Difficulty in retaining skilled workforce due to limited year-round opportunities
- Lower investment incentives for new services, especially in the rural parts of the county
- Challenges in promoting sustainable and balanced tourism development

Additionally, Pärnu faces growing competition from other destinations that have successfully extended their seasons through indoor attractions, events, or thematic experiences.

Several structural bottlenecks limit Pärnu's ability to grow as a year-round destination:

1. Lack of weather-independent anchor attractions that could drive demand in colder months
2. Insufficient volume of off-season events to attract visitors at scale
3. Limited rural product development, especially outside the summer
4. Mobility gaps, especially public transport and last-mile access in off-season
5. Seasonal service closures, particularly in food & beverage, retail and recreation

6. Weak positioning for niche and thematic tourism (e.g. wellness, culture, learning) beyond summer leisure

Efforts such as the Winter Capital initiative, targeted international marketing, and enhanced cultural programming have shown positive signs, but remain fragmented.

To transition toward sustainable year-round tourism, Pärnu needs:

- A flagship attraction that generates consistent off-season traffic
- Stronger market-product alignment based on demand insights
- A supporting ecosystem of services, events, and transport that functions beyond summer

2.3 Market Needs and Visitor Expectations

Pärnu is currently at a crossroads in developing a more balanced year-round tourism strategy. Traditionally seen as a summer destination, the city now seeks to strengthen off-season appeal, diversify experiences, and address changing visitor expectations. This section explores current demand profiles, motivations, and untapped opportunities based on visitor behavior and strategic benchmarking. Special attention is given to key markets—Estonia, Finland, Germany, Latvia, Lithuania, Sweden, and Poland—each presenting distinct needs and potential roles in shaping future investments.

2.3.1 Current target markets

This section outlines the role of the domestic Estonian market, the significance of neighboring countries (especially Finland and Latvia), and the emerging potential of selected international markets, including Germany, Sweden, and Poland. Each market is assessed based on current visitor flows, seasonal dynamics, traveler motivations, and alignment with new concept development. The analysis helps identify both secure demand foundations and high-opportunity segments for future growth.

2.3.2 Domestic Market – Estonia

Domestic tourism continues to play a crucial role in sustaining Pärnu's visitor economy, particularly during shoulder and off-seasons. Estonian visitors represent a reliable, year-round audience and are often familiar with the destination, enabling frequent short visits and strong word-of-mouth promotion.

Pärnu is widely recognized as Estonia's summer capital, attracting a significant share of domestic overnight stays. However, the majority of bed nights remain concentrated during peak season, and broadening the appeal for local travelers outside summer months is a strategic priority.

Strategic goals related to domestic visitors:

- Shorten the low season by increasing off-season domestic travel (notably in May and September)
- Develop targeted campaigns for family tourists and wellness or cultural interest segments
- Expand niche tourism such as nature-based travel and caravan tourism in collaboration with national and regional tourism associations
- Enhance product development to diversify domestic visitor experiences across the entire region, not just the city

The strategy highlights the need to strengthen internal cohesion within the Pärnu County region by encouraging domestic travel beyond the urban core. In 2023, 88% of all overnight stays took place in the city of Pärnu, with only 12% in the surrounding areas. This imbalance underlines the opportunity to develop rural and nature-based tourism offers that appeal to local travelers.

Estonian tourists form the backbone of Pärnu's tourism economy. While their spending patterns may differ from international guests, their consistent presence and repeat travel habits are essential for maintaining year-round business viability. The strategy calls for continued development and targeted marketing efforts toward the domestic market, ensuring Pärnu remains relevant and attractive for Estonian audiences across all seasons.

2.3.3 Finland, Market Overview

Finland remains a core international source market for Estonia and specifically for Pärnu, due to geographical proximity, cultural ties, and convenient travel connections. According to Visit Estonia's 2023 national population survey, interest in visiting Estonia remains very high among Finnish consumers, with 85% of respondents having visited Estonia at least once.

Visitor Profile and Travel Frequency:

- 35% of respondents reported having visited Estonia three or more times per year
- Frequent visitors are primarily from Southern Finland (especially Uusimaa) and Western Finland
- Visitors are typically aged 45 and older, with steady interest across middle and older age groups
- Many have a high level of education and income, making them well-positioned for premium experiences

Key Motivations and Preferences:

- Wellness and spa experiences remain the strongest travel motivator
- Short leisure getaways, cultural events, and culinary experiences are highly valued
- Price-quality ratio, safety, and ease of access are decisive factors
- Increasing interest in eco-conscious, local, and quiet experiences, particularly among younger and urban audiences

Challenges and Barriers:

- Saturation and familiarity with traditional destinations (e.g. Tallinn) reduce novelty

- Perception of Pärnu as a summer-only destination limits interest in low season
- Weak visibility of off-season experiences, particularly in digital and Finnish-language marketing

Implications for Pärnu's Development Strategy:

- Strengthen messaging and products for short, year-round wellness escapes
- Promote cultural weekends and seasonal events with high-quality Finnish-language content
- Position Pärnu as a peaceful, nature-connected destination outside peak months
- Develop products and services tailored to repeat visitors and higher-spending customer segments

2.3.4 Latvia, Market Overview

Latvians rank among Estonia's most important international tourists. In 2024, Latvian residents made approximately 2.3 million trips abroad, representing a growth of 8.4% over 2023. Estonia was the second-most visited foreign destination, accounting for 15.3% of overnight trips.

Within Estonia, Latvian tourists play a significant role in Pärnu's tourism sector. Accommodation data from 2024 shows that nearly 251,000 Latvian visitors stayed overnight in Estonia—a 9% increase compared to 2023 and a 37% increase compared to 2019. Pärnu consistently ranks in the top five destinations for overnight stays by foreign tourists, indicating its strong appeal beyond Tallinn.

What Drives Latvian Travel to Pärnu?

- Proximity and ease of access: A convenient 2-hour drive connects Riga with Pärnu, offering quick regional getaways.
- Wellness and beach appeal: Latvians value Pärnu's high-quality spa and beach offerings—seen as superior to similar options in Lithuania and Poland.
- Urban friendliness: Latvia's tourism professionals acknowledge Estonia's more professional tourism infrastructure and language friendliness compared to neighboring countries.
- Cultural affinity: Shared Baltic culture, similar lifestyle values, and cross-border marketing campaigns support steady interest.

Market Profile & Seasonal Considerations

- Most Latvian visits feature overnight stays averaging 5.5 nights, with spending over €100/night, indicating a market with moderate length and willingness to spend.
- Although most visits occur in summer, shoulder and off-season travel is rising—Latvians are increasingly drawn to Estonia's wellness offerings when weather allows.
- Ongoing infrastructure improvements—such as enhanced road connections and potential Rail Baltica upgrades—are likely to further improve accessibility and off-season travel potential.

Strategic Implications for Pärnu

- Dominant regional market: Latvians are a top source market and should be prioritized alongside Finnish and domestic German segments.
- Product alignment: Investments extending beach and wellness offerings into off-season (e.g. indoor beach, spa events) will meet Latvian travel preferences.

- Marketing resonance: Campaigns highlighting quality, ease of access, and professional service—especially in Latvian-language—will reinforce Pärnu’s position.
- Seasonal emphasis: Programs like indoor beach festivals and wellness weekends can capture shoulder-season visits effectively.

2.4 Emerging and Potential Markets

While Estonia’s domestic market and neighboring countries currently form the backbone of Pärnu’s tourism, there is growing interest in expanding reach toward larger, high-potential source markets. This chapter explores emerging opportunities in key international markets—specifically Sweden, Germany, and Poland—that show promise for future growth, especially in off-season and themed travel segments. Each market offers distinct visitor motivations, travel behaviors, and connections to Pärnu’s developing tourism themes such as wellness, culture, and short-haul experiences.

2.4.1 Sweden, Market Overview

Sweden remains a relevant and nearby source market for Estonia and Pärnu. Swedish travelers are typically experienced, value-driven, and increasingly motivated by sustainability, convenience, and authentic experiences. As a neighboring country with strong ferry connections to Estonia and well-established travel habits, Sweden holds significant potential for increasing year-round tourism to Pärnu.

Market Characteristics and Travel Behavior

Swedes prefer travelling by car, ferry, train or bus, which supports Estonia’s accessibility through ports such as Tallinn. The growing availability of new vessels and routes (e.g. Naantali–Kapellskär–Tallinn–Pärnu corridor via Finland) further reinforces Pärnu’s reachability. While Finland is often top of mind, Estonia offers a fresh alternative with lower costs, cultural diversity, and unique experiences – especially when framed as part of a regional, multi-country itinerary.

Swedish travelers often seek:

- Nature-based and light outdoor activities
- Culinary experiences and local specialties
- Trendy, authentic cultural content
- Relaxing weekend getaways and wellness services

- Family-friendly offers and shared experiences

They follow trends and recommendations closely, especially via platforms like Google, Instagram, Tripadvisor, and OTA booking platforms (e.g., Booking.com, Hotels.com). Swedes are highly digital-savvy but also respond to curated, high-quality content.

Swedish travelers are:

- Trend-sensitive and socially influenced
- Motivated by sustainability, proximity, and safety
- Interested in new, unexpected destinations
- Likely to choose well-packaged, easy-to-book offers
- Receptive to off-season travel and wellness experiences

There is also a growing trend toward nature-based calmcations, cultural discovery, and curated local services rather than generic nature mentions. They value activities (e.g., berry picking, SUP tours, guided hikes) more than just scenery. Highlighting unique attractions and services – such as family-friendly water parks, spa and wellness services, sauna experiences, and nature-inspired accommodations – can resonate well with this audience.

Relevance for Pärnu

To attract Swedish travelers, Pärnu should:

- Emphasize accessibility by ferry and car
- Curate appealing weekend and seasonal packages (e.g., wellness, family, gastronomy)
- Offer clear sustainability messaging – not preachy, but concrete
- Present culture and nature in trend-forward, activity-based formats
- Utilize visual-first channels for reach and inspiration (especially Instagram)
- Promote product uniqueness – e.g. Estonia's spa traditions, music festivals, authentic local stories, and coastal character

In summary, Sweden presents a high-potential market for Pärnu, particularly for sustainable, short-haul, and experience-seeking travelers. Strategic positioning, visibility in relevant digital channels, and clear product narratives will be key to success.

2.4.2 Germany, Market Overview

Germany is one of the most important outbound travel markets in Europe, with a high volume of both long and short leisure trips. German travelers are frequent, early-booking, and value structure, quality, and safety in their holiday choices. While southern Europe remains dominant, northern and eastern European destinations are gaining ground, particularly among nature-oriented and sustainability-conscious travelers.

Traveler Characteristics and Preferences:

- Many Germans take multiple holidays annually, combining beach, wellness, and nature trips.
- Rest and relaxation is the main travel motivation (58% of respondents); wellness and slow travel are particularly appealing.
- There is growing demand for nature, sustainability, and authentic experiences—especially among families and mid-life couples.
- Germans value safety, peacefulness, and affordability, all of which match well with Estonia's and Pärnu's positioning.

Mobility and Access:

- Germany has strong ferry and cruise connections to the Baltic Sea region, including routes via Finland and Estonia.
- The renewed Travemünde–Helsinki ferry connection by Finnlines enhances the potential for overland and multi-country travel combining Germany, Finland, and Estonia.
- These routes create opportunities for circular itineraries and multi-destination experiences, where Pärnu can serve as either a stopover or a central highlight.
- Pärnu's location along major corridors (Via Baltica, Rail Baltic) positions it well to capture travelers moving between key ports and capitals.

Booking Channels and Travel Organization:

- Around 50% of German leisure travelers use tour operators or travel agencies, with structured trips still popular—especially for new destinations.
- Online Travel Agencies (OTAs) are widely used for flexible and short bookings.
- A growing network of niche and theme-based tour operators offers group travel, nature, and wellness-focused packages to the Baltics.

Trends Relevant for Pärnu:

- Interest in undiscovered northern destinations with cultural character and unspoiled nature

- Extended stays and overland travel combining several Baltic Sea countries
- Spontaneous short bookings through digital channels
- Demand for clear narratives and bundled experiences (e.g., “coastal wellness,” “Nordic nature,” “Baltic traditions”)
- Social media–driven inspiration, especially among younger age groups

Opportunities for Pärnu:

- Be positioned as a key stop on multi-country Baltic Sea routes, especially for travelers arriving via ferry or overland from Germany
- Package wellness, coastal nature, and local traditions into year-round offerings
- Leverage Pärnu’s accessibility and regional context as an advantage in broader Baltic itineraries
- Collaborate with German DMCs and OTA platforms to ensure visibility and availability

2.4.3 Poland: Market overview

Poland is emerging as a promising potential source market for Pärnu, especially in light of improved accessibility via Rail Baltica and growing outbound tourism demand. Polish residents made approximately 10.4 million overnight trips abroad in 2023, a notable increase after pandemic-era declines. The country has a strong tradition of European leisure travel, and while Germany, Italy, and the United Kingdom remain top destinations, there is rising interest in regional, less-explored destinations.

Key Market Trends

- Summer-focused travel: Polish outbound tourism is heavily concentrated between June and September, with August as the peak month. This aligns with school holidays and broader European travel rhythms.
- Family travel: A significant portion of Polish tourists travel in family groups, seeking destinations with safe, affordable, and engaging activities for both children and adults.
- Affordability & value: Budget-consciousness remains central in travel decision-making. Destinations that offer quality for money, package deals, and low-cost accessibility appeal to this market.

- Word-of-mouth influence: Recommendations from friends, family, and trusted operators play a major role in destination selection.
- Group travel & coach-based itineraries: Many Polish travelers rely on operators offering group packages or coach travel, especially in the mid-price and senior segments.

Relevance for Pärnu

While still modest in visitor numbers, Poland shows growth potential for Pärnu. In 2023, approximately 13,000 Polish tourists stayed overnight in Estonia, an increase of 42% compared to 2019, suggesting early momentum. Pärnu's position on the future Rail Baltica route strengthens the long-term opportunity, especially for independent and low-emission travelers.

- Cultural appeal: Polish tourists are attracted to spa traditions, beach culture, and local food—all of which Pärnu can offer.
- Accessible pricing: Pärnu's pricing sits below that of Nordic capitals, making it a viable leisure destination for Polish families and seniors.
- Events & active travel: Festivals, wellness offerings, and cycling infrastructure (inspired by Hype and Lalandia models) can appeal to diverse segments.

Strategic Implications

- Target mid-market family and active travelers with Polish-language digital campaigns, especially in southern Poland (e.g., Krakow, Katowice).
- Leverage tour operators like ITAKA, Wygoda, and TPO Travel to offer wellness and culture-themed packages.
- Use Rail Baltica as a narrative asset to highlight Pärnu's increasing accessibility in the coming years.
- Offer price-sensitive packages during off-peak seasons to differentiate from more expensive destinations in Western Europe

2.5 Emerging and Potential Market Segments

Tourism trends across Europe show increasing segmentation and a shift toward experience-driven travel. Several new and emerging visitor segments have been identified as relevant for Pärnu:

- **Value-Seeking Travelers:** Tourists looking for affordable destinations outside traditional peak seasons. The economic uncertainty and rising travel costs have made these segments more prominent, especially among younger and family travelers.
- **Urban Explorers and Culture Seekers:** There is a renewed appetite for cultural heritage, city experiences, and iconic attractions. This applies especially to German, French, and American travelers taking city breaks in less saturated urban settings.
- **Nature and Wellness Enthusiasts:** A growing segment seeks restorative, nature-connected experiences with sustainability as a deciding factor. Wellness, slow travel, and rural experiences are in high demand.
- **Digital Nomads and Remote Workers:** Enabled by flexible work policies, this group is seeking longer-term stays in locations that offer good connectivity, nature, and authentic culture.
- **Multigenerational and Nostalgic Travelers:** Particularly among families in Germany, there is a trend toward revisiting places remembered from childhood or traveling with multiple generations .

Pärnu is well-positioned to respond to these segments due to its combination of seaside charm, cultural offering, and growing wellness infrastructure.

2.5.1 Visitor Motivations, Preferences and Behavior Patterns

Current visitor behavior is increasingly shaped by value, wellbeing, cultural immersion, and flexibility. Key motivations include:

- **Relaxation and Mental Recharge:** A majority of visitors (e.g., 58% of Germans) state relaxation and stress relief as top travel goals, favoring destinations that offer calm, natural surroundings and wellness options .
- **Authenticity and Local Experiences:** There is increasing demand for locally rooted services, regional cuisine, and cultural storytelling. Short-term rentals and boutique accommodations perform well in this context.
- **Cultural Events and Seasonal Activities:** Festivals, food fairs, and seasonal cultural happenings drive short-break bookings, especially in the shoulder seasons.
- **Flexibility and Independent Planning:** Many travelers prefer customized itineraries over fixed packages. There's a trend toward semi-structured trips booked via OTAs and direct channels.

- **Sustainability and Ethics:** Around 70% of travelers react positively to sustainability themes, with ~8% citing it as a decisive factor. Destinations that communicate sustainability well gain a competitive edge .

These patterns suggest that Pärnu should focus on delivering authentic, flexible, and wellness-oriented experiences that appeal to independent travelers while offering curated options for those who prefer pre-organized stays.

2.5.2 Influential Travel Trends and Demand Shifts

The travel landscape in 2025 is shaped by emotional needs, changing climate conditions, technological disruption, and a growing desire for authenticity and purpose. Multiple overlapping macro-trends influence how and why people travel today.

1. Wellness and “Calmcations”

Travelers increasingly seek peace, mental restoration, and silence. “Calmcations” – slow-paced, tech-free, nature-based holidays – are rising in popularity. Travelers value clean environments, quietness, and access to wellness services like saunas, spas, and natural swimming areas.

2. Nighttime Experiences and Noctourism

There’s a growing appetite for travel after dark – including aurora borealis watching, nighttime museum access, and immersive stargazing. Solar activity is peaking in 2025, making destinations like Pärnu ideally placed to develop night-oriented seasonal offerings.

3. Off-the-Beaten-Path Becomes Mainstream

Travelers are actively seeking lesser-known destinations with fewer crowds. “Destination dupes” are increasingly appealing – alternatives to over-touristed hotspots. Pärnu, as a charming Baltic destination, is well-positioned to benefit from this redirection.

4. Purposeful and Nostalgic Travel

Tourism is no longer just about escape – it’s about transformation, reconnection, and meaning. Travelers are turning to sleep tourism, nature immersion, nostalgia-based trips, and even grief or emotional healing retreats. Travel is becoming a tool for emotional well-being.

5. Coolcations and Climate Shift Tourism

Summer heatwaves in Southern Europe are driving demand for cooler, temperate climates. Northern Europe is increasingly seen as a premium summer destination. Pärnu’s seaside location and moderate summer temperatures make it attractive for these climate-aware travelers.

6. Tech and AI-Enhanced Planning

Generative AI is changing how trips are planned, booked, and personalized. Destinations

must ensure their offerings are well-structured and visible to smart algorithms, while maintaining the human element in storytelling and service.

7. Community and Human Connection

Solo and group travel formats are adapting to a post-pandemic world where people seek real-life social experiences. Romantic getaways, friendship travel, and “travel to meet people” themes are re-emerging as core motivations.

8. Sustainability as a Standard

Sustainable travel is no longer a niche – it is a baseline expectation. Visitors expect responsible destination management, visible eco-efforts, and options that align with their environmental values.

2.5.3 Preferred Services and Experiences by Target Group

To effectively meet demand, Pärnu’s development must align with what travelers truly seek. Different visitor profiles value different types of services, yet some preferences are widely shared, such as flexibility, authenticity, and wellness.

Families with Children

- Water parks, adventure playgrounds, and safe beaches
- Interactive nature and science centers
- Family saunas, kid-friendly spas, shallow pools
- Themed experiences (e.g. fairy-tale forests, story trails)
- Accommodation with family rooms and activity programs

Wellness Travelers & Calmcation Seekers

- Spa and wellness hotels offering restorative programs, nature integration, and peace
- Quiet walking routes, soundscapes, and forest bathing
- Local food, herbal treatments, and sustainable amenities
- Tech-free cabins, digital detox packages, silent zones

Young Adults & Explorers

- Active experiences: kayaking, cycling, SUP, trail running
- Social summer events, open-air cinemas, night markets

- “Instagrammable” moments and digital storytelling elements
- Independent booking tools, flexibility, last-minute availability

Cultural Explorers & Seniors

- Year-round accessible museums and guided cultural experiences
- Local crafts, history storytelling, slow-paced sightseeing
- Wellness with therapeutic elements (e.g. salt rooms, thermal pools)
- Culinary tours, concerts, and festivals with seating and service

Digital Nomads & Long-Stay Guests

- Reliable Wi-Fi, coworking spaces, long-stay accommodation options
- Access to wellness, community, and walkability
- Integrated mobile services and up-to-date information platforms

Pärnu's future attraction development should respond to these preferences with a mix of relaxation, interactivity, sustainability, and emotional relevance. A successful service portfolio will blend seasonal adaptability with signature experiences that reflect the region's identity, climate, and hospitality culture.

3. Accessibility development

3.1 Accessibility – Rail Baltica and the Future of Railway Connections

The Rail Baltica project is a transformative infrastructure initiative that aims to integrate the Baltic States into the European rail network through a high-speed, sustainable rail corridor connecting Tallinn to Warsaw and beyond. For Pärnu, Rail Baltica presents significant future opportunities in terms of accessibility, connectivity, and regional development.

Project Timeline and Scope Relevant to Pärnu

- **Main Line Construction:**
The construction of the Rail Baltica main line is underway, with major international consortium agreements already signed in Estonia. According to current plans, the line between Tallinn and Pärnu is expected to be completed by **2030**, at least to a level that enables **domestic passenger rail services**.

- **International Connections:**
Full international train service will depend on progress in Latvia and Lithuania. Once complete, Pärnu will be directly linked to major cities such as Riga, Kaunas, and Warsaw, with potential connections further into Central Europe.
- **Pärnu International Passenger Terminal:**
The construction permit for the Pärnu international terminal has been granted, and the terminal is planned to be operational by 2030. This terminal will be the only stop in the region for international trains.
- **Domestic Stops:**

In addition to the Pärnu terminal, several domestic stops (Urge, Tootsi, Surju, Urissaare, Kaisma) are planned to support regional mobility. These stops will enhance internal Estonian connectivity, but will not be used for international traffic.
- **Freight Terminal:**

A preliminary design for a freight terminal and maintenance facility in Pärnu has been completed. The actual construction will depend on securing sufficient freight volumes. As of now, the freight terminal is unlikely to be included in the initial phase.

Expected Benefits for Pärnu and Its New Tourism Development

1. Improved Accessibility for International Visitors:

The Pärnu international terminal will provide direct, high-speed rail access for travelers from Tallinn, Riga, and other European cities. This drastically improves Pärnu's reachability without relying solely on road or air connections.

2. Support for Year-Round Tourism:

The enhanced connectivity can support the strategic aim of establishing a year-round tourism hub by making travel to Pärnu faster, easier, and more sustainable.

3. Modal Shift and Sustainable Mobility:

Rail Baltica promotes a shift from car and air travel to rail, supporting the green transition and sustainability goals of both Estonia and the EU. This aligns with modern traveler expectations for low-emission travel.

4. Increased Domestic and Regional Visitor Flow:

Local stations along the route support regional development and domestic tourism by linking rural areas and small communities to Pärnu and its services.

5. **Economic Development and Investment:**
Enhanced infrastructure often leads to increased investor interest in the surrounding areas. The new tourism concept in Pärnu could benefit from private sector engagement, driven by better connectivity and visibility.
6. **Positioning Pärnu as a Key Node in the Baltic Tourism Corridor:**
With the Rail Baltica terminal, Pärnu could strengthen its position as a central stop between Tallinn and Riga, encouraging stopover tourism, overnight stays, and extended visitor experiences.

3.2 Accessibility – Road Infrastructure and the Development of Via Baltica

Via Baltica (European route E67) is one of the most important road corridors in the Baltic region, connecting Helsinki to Warsaw via Tallinn, Pärnu, Riga, Kaunas, and beyond. For Pärnu, this highway represents a crucial backbone for cross-border mobility, domestic travel, and tourism logistics.

Current Development Status of the Via Baltica Corridor (Tallinn–Pärnu–Ikla)

- **Progressive Upgrading to Four Lanes:**
The Tallinn–Pärnu–Ikla route is being gradually upgraded to a four-lane highway in Estonia.
- **Completed and Ongoing Sections:**
 - The Pärnu–Uulu section was recently completed.
 - The Sauga–Pärnu section is expected to be finished in 2025.
 - The Libatse–Nurme section, including the Are bypass, is undergoing tender evaluation. If awarded, construction is expected to be completed by the end of 2029.
 - Additional works are underway at Rail Baltica intersections, ensuring integration between road and rail networks.
- **Planned but Unfunded Section:**
 - The Uulu–Ikla (towards the Latvian border) section requires a national special spatial plan, but currently lacks funding in Estonia’s road maintenance plan.
- **Cross-Border Development – Latvia:**

- Latvia is exploring public-private partnerships to speed up upgrades on their Via Baltica corridor, underlining the strategic importance of the route for both freight and passenger traffic in the region 【source: ERR, 2024】 .

Relevance and Benefits for Pärnu and Its Tourism Hub

- 1. Strengthened Regional Connectivity:**
As a mid-point between Tallinn and Riga, Pärnu benefits directly from improved road conditions. Faster, safer, and more comfortable travel is key for regional visitor flow.
- 2. Gateway for Independent Travelers:**
Road accessibility is critical for key segments such as Finnish, Swedish, German, and domestic Estonian travelers who favor self-drive holidays, often traveling by car, camper van, or bus.
- 3. Increased Accessibility for Events and Day Visitors:**
Enhanced highway conditions make Pärnu more attractive for weekend visitors, event tourism, and short-stay trips, especially from Southern Finland and Northern Latvia.
- 4. Support for Year-Round Travel:**
Upgraded infrastructure supports season extension, allowing easier access during off-season months when weather conditions could otherwise discourage travel.
- 5. Tourism Logistics and Freight Flow:**
As infrastructure improves, supply logistics for the tourism industry (goods, food, services) become more efficient. This supports both the tourism sector and potential development of large-scale attractions.

4. Benchmarking and Competitive Analysis

Benchmarking process began with a broad review of over 30 potential cases from Europe and internationally, sourced from previous studies, trend reports, destination databases, and curated searches on platforms like TrendHunter 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. The list of potential cases is an appendix to this report

4.1 International Benchmarking of Year-Round Attractions

The benchmarking examples were selected based on the following criteria:

- Alignment with the core values of the envisioned Pärnu destination concept (wellbeing, immersion in nature, seasonality balance, regenerative thinking)
- Diversity in concept types (e.g. wellness, cultural, eco-regenerative, entertainment)
- Demonstrated success in managing seasonality or offering year-round appeal
- Innovative use of location, infrastructure or storytelling
- Relevance to target markets (Baltics, Nordics, DACH, international)

4.2 Structure of the Benchmarking Analysis

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

1. **General Concept**
What is the main idea, target audience, and positioning? Is it more entertainment-driven, wellness-focused, family-oriented, etc.?
2. **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)?

3. **Visitor Flows & Numbers**
Total annual visitors, peak vs off-peak season flows, capacity management, and length of visit.
4. **Seasonality Management**
How is the attraction made appealing year-round? What type of programming or climate solutions are used?
5. **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?
6. **Mobility & Infrastructure**
Accessibility: connections to airports, rail, roads, parking. Integration with public transport or local mobility networks.
7. **Relevance for Pärnu**
What lessons or inspiring elements does this case offer for a potential year-round attraction in Pärnu?

Selected Cases for Deep Analysis

Case	Country	Concept Type	Quick Notes
Hype Areena	Finland	Indoor action & esport arena	Innovative concept, adaptable model for youth and tech-savvy audiences
Tatralandia	Slovakia	Water park & wellness complex	Strong seasonality model, integration of spas & skiing in region
Sandcastle Waterpark	UK	Urban indoor waterpark	Accessibility focus, inclusion-driven design, compact layout
Lalandia Billund	Denmark	Family holiday center with waterpark	Integration with LEGOLAND & Billund Airport; strong ecosystem model
Partille Arena	Sweden	Multipurpose indoor arena	Events, sports, concerts; medium-size (up to 5,500); transit-connected

4.3 Tatralandia (Slovakia)

URL : <https://www.tatralandia.sk/en/resort/water-park/tropical-paradise>

4.3.1 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.

4.3.2. 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 stays.

4.3.3 Visitor Flows & Numbers

- **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.

4.3.4. Seasonality Management

- 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.

4.3.5. 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.

4.3.6. 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.

4.3.7. Relevance for Pärnu

The concept demonstrates strong year-round viability through a weather-proof, tropical environment that appeals to a wide audience. Its family-oriented approach successfully combines wellness and entertainment, offering an experience that is both relaxing and fun.

The destination also serves as a valuable example of how to integrate regional strengths—such as access to skiing, nature, and nearby accommodations—into a seamless, multi-service ecosystem. By investing in thermal water infrastructure and developing a thoughtful programme of seasonal events and services, the attraction effectively extends the tourism season. Moreover, it highlights how a single large-scale facility can serve as a brand anchor for the entire destination, enhancing visibility and visitor flow across the wider region.

4.4. Hype Areena (Finland)

URL: <https://hypeareena.fi/fi>

4.4.1. 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.

4.4.2. 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).

4.4.3. Visitor Flows & Numbers

- **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.

4.4.4. Seasonality Management

- 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.

4.4.5. Location & “Spirit of Place”

- Located in Espoo, a large Finnish city, next to 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.

4.4.6. Mobility & Infrastructure

- Easily accessible by **train from Helsinki** and southern Finland (within ~30 minutes from Helsinki).
- Located next to a shopping center, with good local services and visibility.
- Regional and national bus/train connections support family and group visits.

4.4.7. Relevance for Pärnu

This concept offers a modular and scalable indoor solution that suits the needs of smaller cities like Pärnu. It blends a tech-forward identity with engaging experiences for families and younger audiences, making it especially relevant for destinations looking to modernize their appeal.

The model has the potential to anchor off-season visitation and address existing gaps in indoor leisure infrastructure. It also provides inspiration in terms of brand positioning, with effective partnerships formed between technology companies, startups, and cultural operators. Additionally, it demonstrates how strategic programming—such as school group activities and seasonal events—can drive traffic during traditionally quieter months.

4.5. Sandcastle Waterpark (United Kingdom)

URL: <https://www.sandcastle-waterpark.co.uk/>

4.5.1. 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).

4.5.2. 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.

4.5.3. Visitor Flows & Numbers

- **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.

4.5.4. Seasonality Management

- 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.

4.5.5. 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.

4.5.6. 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.

4.5.7. Relevance for Pärnu

This example illustrates how an indoor water attraction can successfully operate throughout the year, even in a traditionally seasonal beach destination. It highlights the benefits of aligning the attraction with broader city branding and forming strong partnerships with accommodation providers to extend visitor stays.

The emphasis on accessibility, inclusivity, and offering different levels of experiences makes it a valuable benchmark for designing attractions that cater to diverse audiences. Additionally, the concept shows how thoughtful immersive design can help overcome limitations posed by local weather conditions. Its public-private operational model also provides a compelling reference for how similar stakeholder collaboration could be implemented in Pärnu.

4.6. Lalandia Billund (Denmark)

URL <https://www.lalandia.dk/en/billund>

4.6.1. 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.

4.6.2. 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.

4.6.3. Visitor Flows & Numbers

- 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).

4.6.4. Seasonality Management

- 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).

4.6.5. 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.”

4.6.6. Mobility & Infrastructure

- Short 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.

4.6.7. Relevance for Pärnu

This case showcases how to develop a complete indoor holiday destination that not only supports overnight stays but also integrates well with the surrounding community and regional offering. It demonstrates a strong synergy between accommodation, water-based recreation, and complementary entertainment services, providing a seamless visitor experience.

The concept offers valuable insights into operational scale and the design of family-focused services. Its branding success, strengthened by high-profile partnerships such as with LEGOLAND, underlines the importance of strategic collaboration. Moreover, it emphasizes the value of destination clustering and building a broader “ecosystem” of attractions that collectively enhance the region’s year-round appeal.

4.7. Partille Arena (Sweden)

URL <https://www.partillearena.se/event/>

4.7.1. 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.

4.7.2. 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.

4.7.3. Visitor Flows & Numbers

- 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.

4.7.4. Seasonality Management

- 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.

4.7.5. 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.

4.7.6. 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.

4.7.7. Relevance for Pärnu

This case provides a scalable model of a flexible, mid-sized arena that successfully blends event tourism with everyday local use. It demonstrates how public and commercial functions

can be effectively combined to ensure both economic viability and community relevance. The project highlights the importance of strong transportation connectivity to support steady audience flows, especially for larger events. For Pärnu, it offers inspiration to develop multi-use infrastructure that not only complements seasonal rhythms but also strengthens the town's identity. It reinforces the value of anchoring major attractions in local culture and daily life while remaining appealing to wider domestic and international markets.

5. Key Observations for Concept Development

This chapter summarizes the key findings from the market analysis, benchmarking, stakeholder input, and spatial review, setting the stage for concept development.

5.1 Pärnu's Strengths and Strategic Identity

Pärnu's identity as Estonia's Summer Capital is a powerful foundation for destination development. It conveys long-standing associations with leisure, wellness, and a relaxed coastal lifestyle. However, this identity has also contributed to a seasonal concentration of visitation, often overshadowing the region's potential for cultural, event-driven, and nature-based year-round tourism.

Key strengths include:

- **Seaside and riverfront lifestyle:** The dual waterfronts (sea and river) offer symbolic and functional value, combining relaxation, activity, and aesthetic appeal.
- **Historic and cultural richness:** Hanseatic roots, spa traditions, Soviet-era heritage, and vibrant contemporary culture offer a deep narrative foundation.
- **Compact, human-scale city:** Pärnu's walkable size and calm pace make it ideal for multi-day stays focused on wellbeing, culture, and exploration.
- **Emotional appeal:** Visitors consistently highlight a sense of safety, nostalgia, and reconnection when describing their experiences in Pärnu.
- **Trusted domestic destination:** A loyal Estonian customer base provides year-round reliability, especially in off-peak months.

Target market findings show strong potential to engage:

- **Domestic travelers** – particularly short-break, family, and multigenerational segments.
- **Finnish and Latvian visitors** – for seasonal travel, wellness, and family recreation.
- **German-speaking markets** – drawn by spa, wellness, and boutique travel.
- **Emerging potential in Poland and Sweden** – based on connectivity and shared travel habits.

5.2 Sustainability, Accessibility, and Energy Infrastructure

Several structural developments in and around Pärnu provide a unique platform for long-term success:

- **Rail Baltica & Via Baltica:** These corridors will significantly enhance access from Tallinn, Riga, and beyond, making Pärnu a natural pause point for leisure and business travel.

- **Renewable energy investments:** Pärnu County is one of Estonia’s leaders in clean energy infrastructure. New attractions can integrate green energy production and communicate sustainability narratives to conscious travelers.
- **Local mobility ecosystem:** A compact urban structure enables low-carbon, car-free visitor flows using e-shuttles, bike sharing, and walkable paths. This supports a future-proof, low-impact tourism model.

The combination of these factors creates an ideal environment for a modular, sustainable visitor hub that grows over time without overstretching the local capacity.

5.3 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.

5.4 Key Learnings from Benchmarking

The benchmarking of international year-round tourism and leisure attractions revealed clear patterns in concept success factors, investment models, and adaptability to seasonality. While Pärnu cannot and should not replicate large-scale theme parks or resort cities, the most relevant examples offer valuable direction for creating a distinctive and viable concept in the local context.

Key insights include:

- Indoor beach and climate-based experiences (e.g. *Tropical Islands*, *Sandcastle Waterpark*): These concepts attract broad visitor segments through weather-proof, emotionally evocative experiences. They offer relaxation, play, and sensory immersion in contrast to outdoor limitations. For Pärnu, the “Eternal Summer” beach concept aligns naturally with its coastal brand, spa tradition, and architectural potential.

- Seasonally adaptive arenas and event venues (e.g. *Hype Areena*, *Partille Arena*): These multifunctional hubs successfully combine culture, sports, community events, and hybrid programming. Their economic sustainability relies on flexible use, digital services, and continuous content generation. For Pärnu, such a model could serve as a medium-scale venue that supports events from October to April, complementing the summer season.
- Integrated attraction ecosystems (e.g. *Lalandia*, *Do the Beach*, and multi-site district concepts): These models demonstrate how modular growth, diverse services, and coordinated branding can turn a small area into a dynamic destination. They often connect accommodations, event space, wellness, family activities, and storytelling into a single visitor journey. In Pärnu's case, this could evolve as a destination "district" developed in phases, activating underutilized spaces and leveraging seasonal flexibility.

Across all examples, successful concepts:

- Are rooted in local identity while borrowing scalable design and operational models
- Balance indoor and outdoor elements to maximize flexibility and respond to climate and seasonality
- Focus on modular infrastructure that allows for phased investment and adaptive use
- Embed digital layers to enhance experience and operational resilience (e.g. booking systems, hybrid events)
- Build loyalty through repeatable experiences, annual passes, and local user engagement

These lessons point toward three promising strategic directions for Pärnu's future concept:

1. A year-round indoor beach and wellness hall, building on Pärnu's iconic summer identity
2. A transformable arena for events, sports and culture, inspired by Nordic best practices
3. A modular, phased destination ecosystem, which grows through connected services and locations

Each option can be refined and adapted based on investment level, public-private cooperation, and long-term city planning goals.

5.5. Summary: Opportunities to Stand Out

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.

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

Appendices

Appendix A. List of sources used.

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Appendix B. Benchmarking Sites

Hype Areena (Finland)

A modular entertainment and sports complex with esports, wellness, restaurants, and multipurpose event spaces. Integrates hybrid digital-physical experiences and serves local and regional audiences.

 <https://hypeareena.fi/fi>

Tatralandia (Slovakia)

Indoor/outdoor water park with a tropical paradise zone, thermal water, wellness areas, and family-focused services. Operates year-round and combines natural geothermal resources with active leisure.

 <https://www.tatralandia.sk/en/resort/water-park/tropical-paradise>

Sandcastle Waterpark (UK)

Indoor water park featuring a Caribbean theme, wave machines, slides, and spa facilities. Offers group bookings and private events, adapting well to different target groups.

 <https://www.sandcastle-waterpark.co.uk/>

Lalandia (Denmark)

Family holiday center combining indoor tropical waterpark, sports, dining, accommodation, and entertainment. Designed as a one-stop destination for multiday stays.

 <https://www.lalandia.dk/en/billund>

Partille Arena (Sweden)

Multifunctional arena hosting sports events, concerts, conferences, and community activities. Flexible infrastructure and location close to Gothenburg enhance its appeal.

 <https://www.partillearena.se/event/>

Rulantica (Europa-Park, Germany)

Nordic-themed indoor water park with sandy beach zones, wave pools, slides, and event facilities. Emphasizes storytelling and family experiences.

 <https://www.europapark.de/en/rulantica>

Alpamare (Switzerland)

An indoor water park that includes wave pools, slides, and relaxation areas. Popular among locals and tourists alike, with year-round programming.

 <https://www.alpamare.ch/en/>

Tropical Islands Resort (Germany)

One of Europe's largest indoor water parks, housed in a former airship hangar. Offers artificial beaches, tropical-themed pools, wellness areas, restaurants, and year-round programming.

 <https://www.tropical-islands.de/en/>

Therme Erding (Germany)

Europe's largest thermal spa complex, combining indoor beaches, wave pools, wellness, and event areas. Known for its tropical atmosphere and year-round appeal.

 <https://www.therme-erding.de/en/>

Kinnarps Arena – Jönköping, Sweden

Capacity: 7,000 seats

Uses: Ice hockey, concerts, trade shows

Notes: Home to the HV71 hockey team; versatile event usage

 <https://www.hv71.se>

KV Arena – Karlovy Vary, Czech Republic

Capacity: 7,500 max (5,874 for ice hockey)

Uses: Ice hockey, multi-purpose events

Notes: Multi-complex venue with additional halls and a swimming center

 <https://www.kvarena.cz/>

Kolodruma – Plovdiv, Bulgaria

Capacity: 6,100 for sports, 7,500 for concerts

Uses: Cycling, basketball, concerts, trade shows

Notes: Unique indoor velodrome; versatile for sports and cultural events

 <https://kolodrumplovdiv.com/en>

Ballerup Super Arena – Ballerup, Denmark

Capacity: 6,500 seats (9,200 for concerts)

Uses: Cycling, concerts, corporate events

Notes: Nordic region's only international indoor velodrome; hosted World Championships in cycling


 <https://ballerupsuperarena.dk/>

Heraklion Indoor Sports Arena – Heraklion, Greece

Capacity: 5,222 permanent seats (5,500 with temporary stands)

Uses: Basketball, gymnastics, martial arts

Notes: Hosted several FIBA championships and other international sports events

 <https://www.crete.tournet.gr/en/crete-guide/sights/sports/indoor-sports-arena-heraklion>

Do The Beach (USA)

Franchise-based indoor beach concept for leisure, events, and training. Offers a strong community and repeat visitor base.

 <https://dothebeach.com>


Nature & Wellness-Oriented Concepts

Bürgenstock Alpine Spa (Switzerland)


- Luxury wellness retreat with mountain views.

-  <https://burgenstockresort.com/de/spa/buergenstock-alpine-spa>


Euphoria Retreat (Greece)

- Holistic health center with a blend of philosophy and biohacking.
-  <https://www.euphoriaretreat.com/>

Forestis (Italy)

- Eco-luxury alpine hotel based on the elements of nature.
-  <https://www.forestis.it/en/>


Lefay Resort & SPA (Italy)

- Sustainable resort focused on energy-efficient wellness.
-  <https://www.lefayresorts.com/>


Six Senses Ibiza (Spain)

- Integrates spa, sustainability, and mindful hospitality.
-  <https://www.sixsenses.com/en/resorts/ibiza>

Galgorm (Northern Ireland)

- Uses biofeedback and tech-integrated wellness experiences.
-  <https://www.galgorm.com/>


SHA Wellness Clinic (Spain)

- High-tech wellness and medical spa destination.
-  <https://shawellness.com/>

Arpa di Pietra (Italy)

- Ecological resort built from sustainable materials.
-  <https://www.arpadipietra.it/en/>

OCÉANO Health Spa Hotel (Tenerife)

- Marine-based health and circular economy.
-  <https://www.oceano.de/en/>

Weissenhaus Grand Village Spa (Germany)

- Luxurious countryside wellness resort.
-  <https://www.weissenhaus.de/en/>

Additional Benchmarking Concepts

Aqualibi (Belgium) – Family-focused tropical water park.

Līvu Akvaparks (Latvia) – One of the largest water parks in the Baltics.

Aquaworld Resort (Hungary) – Indoor water park and resort with spa and hotel.

Efteling (Netherlands) – Open year-round, fairy-tale theme park.

Stockeld Park (UK) – Magical adventure park for families with indoor/outdoor zones.

AREA 47 (Austria) – Outdoor adventure and extreme sports park.

Appendix C.

Kick-Off Workshop summary for the development of a year-round, sustainable tourist attraction in Pärnu.

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Workshop Details

Date: Tuesday, 3 June 2025

Time: 12:00–16:00 (EET)

Location: [ESTONIA Resort Hotel & Spa](#), Pärnu

Language: English

Workshop Programme

12:00 Welcome & Introduction – Workshop goals and introduction to the project and participants

12:20 Market and Destination Overview

Key trends in year-round tourism and target markets

Pärnu's tourism profile and strategic position

13:00 Identifying Key Attributes for Pärnu's Future Attraction

What makes it inspiring, viable, and unique?

14:00 Break – Light Refreshments

14:20 Benchmarking Insights and selection

Review of international examples

15:00 Wrap-Up & Next Steps – Reflections and feedback – How the results will be used

15.30 End of Workshop

Why attend?

Get introduced to the project team and goals

Contribute your local perspective

Discuss international tourism trends and traveller expectations

Help identify success factors and focus themes for the future attraction

Collaborate with others in shaping the next steps

Your insight is essential for the success of this initiative. Let's build something meaningful for Pärnu – together.

Pärnu- Tourism Profile and Strategic Position

Pärnu is traditionally known as Estonia's **summer capital**, with its south-facing coastline offering beaches, spa culture, and seasonal tourism. Its compact, walkable city center and accessible location between Tallinn and Riga make it convenient for regional tourists, particularly from neighboring Finland, Sweden, and Latvia. However, challenges remain: limited winter tourism, reliance on seasonal offerings, and underdeveloped event infrastructure. One participant noted:

"We have many hotels, but there is no venue for events with more than 500 participants, which limits our potential."

While Pärnu boasts 4,000 beds and high-quality accommodation, it faces competition from destinations with stronger natural attractions or warmer climates. Connectivity improvements—such as Rail Baltica—could position Pärnu strategically as a year-round destination if product diversification and infrastructure are developed.

Key Trends in Year-Round Tourism and Target Markets

Participants highlighted growing interest in **wellness, nature, and experiential tourism** across Europe. The need to attract international markets is evident, especially given Estonia's small domestic base and declining Finnish market share. Germany emerged as an important market, with new flight connections supporting growth, while Latvia continues to be a steady source of visitors, particularly in the spa segment.

One participant summarized the challenge:

"Finnish numbers are falling—Germans might be more important, especially with the new flights."

Trends like digital nomadism and sustainable travel also open opportunities. Target markets within a **two-hour flight radius**—Germany, Poland, neighboring Baltics—present the most realistic growth potential. Long-haul markets remain secondary.

Identifying Key Attributes for Pärnu's Future Attraction

Discussions emphasized that the attraction should:

- **Be year-round**, reducing seasonality and offering consistent appeal.
- Build on Pärnu's **wellness and spa heritage**, while integrating modern, immersive experiences.
- Incorporate **storytelling**, highlighting Pärnu's unique identity, local characters, and Baltic Sea setting.

- Embrace **sustainability and eco-friendly design**, aligning with international trends and funding opportunities.
- Be **accessible and flexible**, accommodating a wide range of visitor profiles, from families to digital nomads.

One participant emphasized the importance of differentiation:

“It shouldn’t be just another spa or just another event center—it needs a clear identity.”

- Complement existing services like Tervis Spa rather than competing with them.
- Offer experiences rather than just a building, e.g., interactive exhibits, hybrid cultural events, or a combination of wellness and entertainment.

Benchmarking Insights and Selection

Participants explored different **benchmarking concepts**, highlighting:

- Multi-use arenas (e.g. indoor sports, concerts, conferences) with flexible designs to host 3,000–5,000 participants. One participant noted:

“An arena could fill hotels and help with the low season.”

- Tropical Islands–type concepts that combine beaches, entertainment, and family experiences, though the investment levels are high (EUR 400–500 million).
- Integration with existing attractions (e.g. spas, local beaches) to create an “ecosystem” rather than a standalone site.
- Hybrid concepts that combine wellness, digital experiences, and cultural programming to attract diverse audiences year-round.
- The importance of transportation links, especially the connection from the railway station to the city center, with one participant noting:

“We already have a bus and taxi system that could connect the new station to the city center.”

Overall, the group recognized that Pärnu’s future attraction should **differentiate itself** through its combination of authentic experiences, sustainability, and accessibility, while learning from successful international examples.