

GREAT TO **SEA** YOU

Through the cosi**EST** airport
to the wildest nature

#Estonia #Tallinn

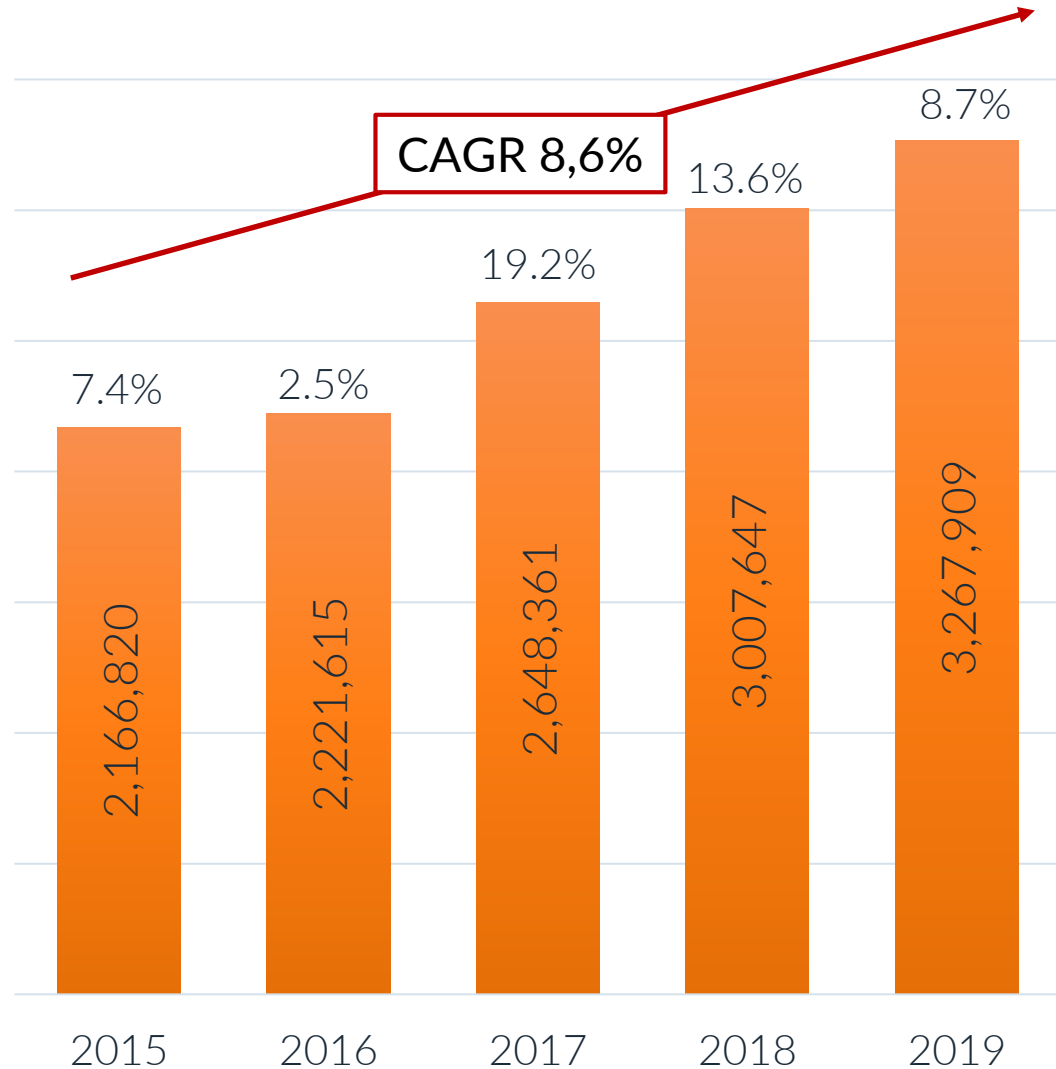
Eero Pärasmäe
20.02.2020

Mida lennufirmad
ootavad?

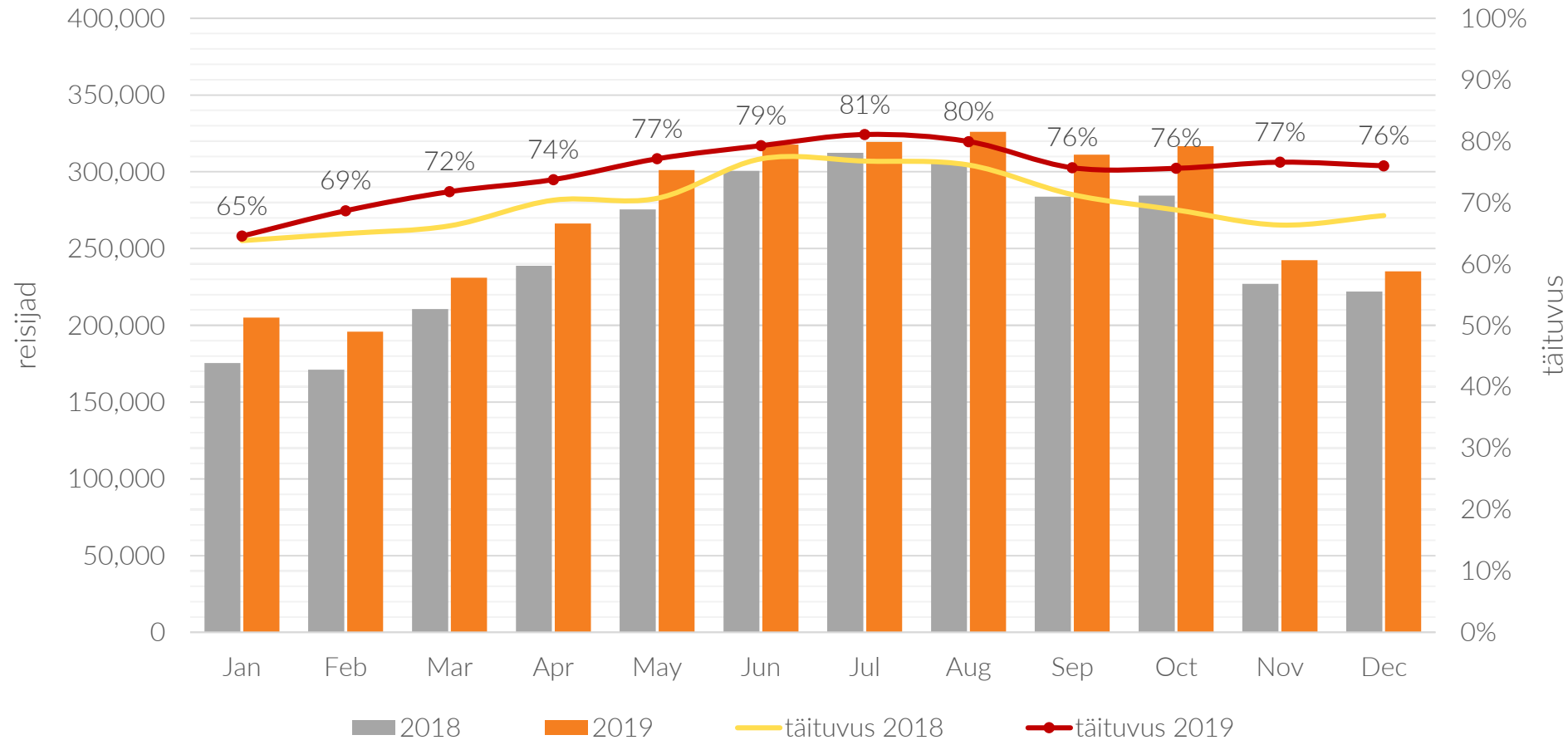


Reisijate arv ületas 2019.aastal 3,2 miljoni piiri

- 5 aasta keskmine kasv 8,6%
- Ca 260 tuhat lisareisijat vrdl 2018
- Keskmiselt 8950 reisijat päevas
- 36 regulaarliini
 - Sh 28 aastaringset
- 15 regulaarset vedajat
- Uued liinid
 - Malaga, Salzburg (BT)
 - Minsk (B2)
 - Kutaisi (W6)
 - München taasavamine (LH)



Reisijate arv ja keskmine täituvus

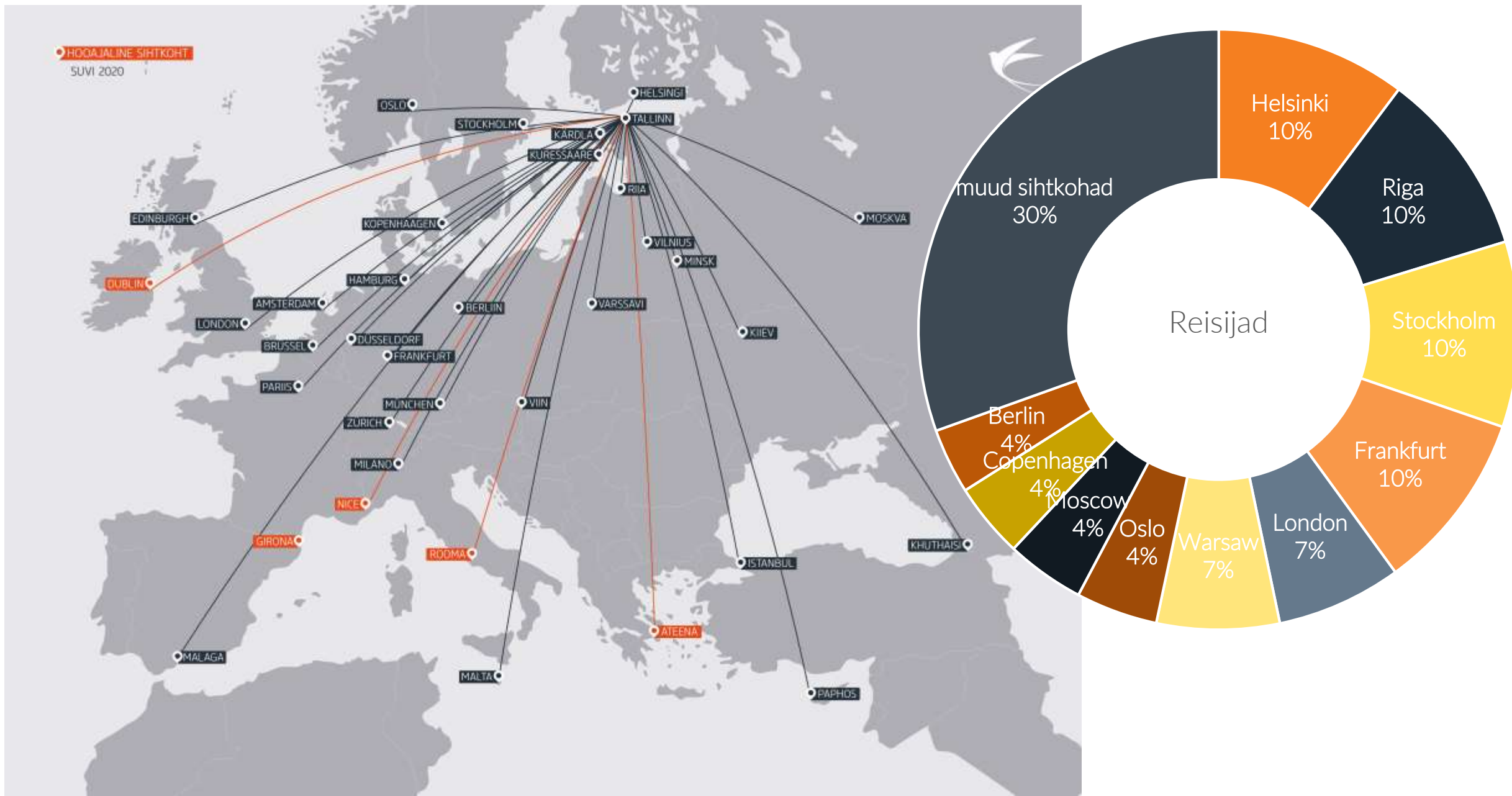




2019 - väga
hea aasta!

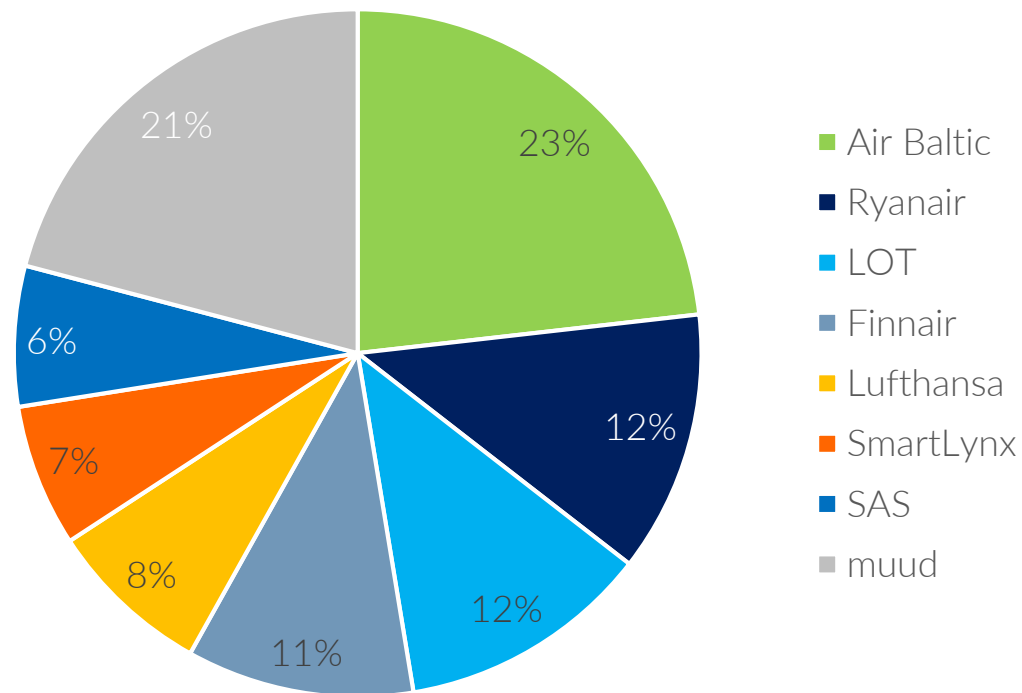


Regulaarlendude võrgustik 2020



Põhinäitajad 2020 jaanuar

- 213 443 reisijat
 - + 4,1% vrdl 2019
- 28 otseliini
- Keskmise täitvus 70,3%
 - 2019.a. jaanuaris 64,5%
- 3260 lennuoperatsiooni
 - - 9,7% vrdl 2019
- 838 tonni kaupa
 - - 3,1% vrdl 2019
- Suvi 2020
 - 35 otseliini (versus 36 2019)



Makro ja mikrokeskond 2020+

(see on teile taustaks ja kodutööks)

Lennundust mõjutavad makrotrendid 2020+

Lähiajal jätkub mõõdukas kasv

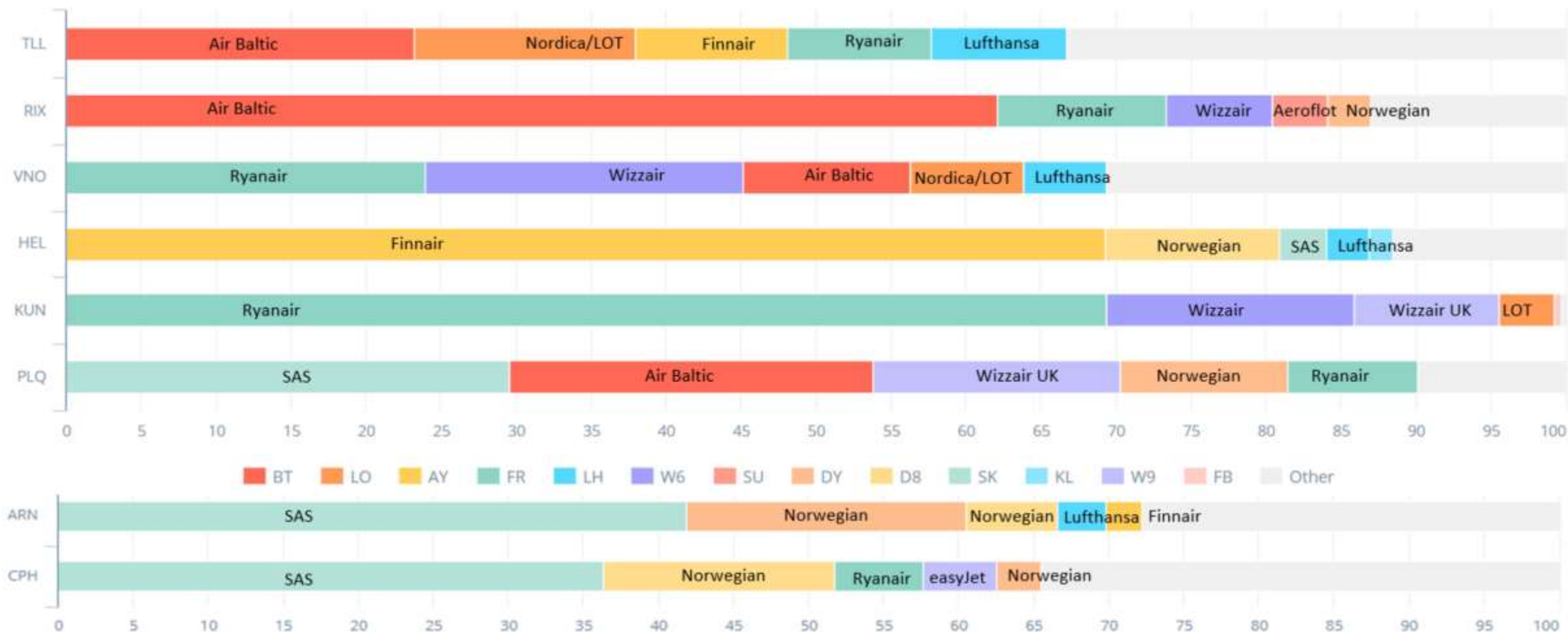
- Kohalik majandus ja töøjõuturg tugevad
- Boeing MAXi probleem
 - lendude/istekohtade pakkumine piiratud
- Geopoliitiline ebastabiilsus – kütuse hinnad, ringiga lendamine (Lähis-Ida)
- Koroonaviirus (välk selgest taevast)

Pikemas perspektiivis

- Kliimamuutused ja keskkonnateemad
 - Lennuhäbi – maismaatranspordi eelistamine
 - Võimalikud riiklikud keskkonnamaksud
- Euroopa õhuruumi ja lennujaamade ülekoormatus (*congestion*)



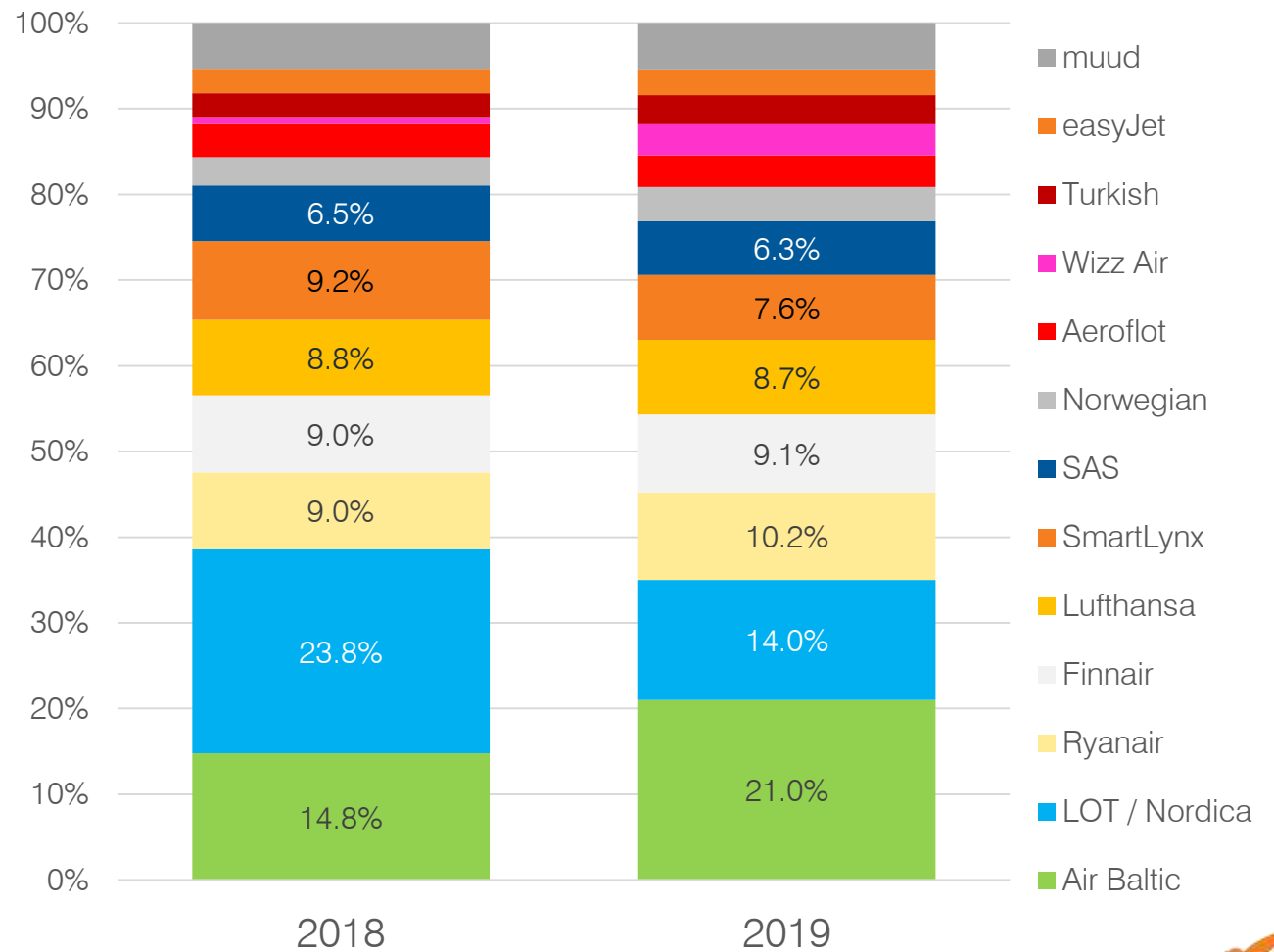
Baltikumi ja Skandinaavia lennujaamade portfooliod 2019



*Lennufirma % pakutavatest istekohtadest, allikas: RDC

Reisijate turuosad

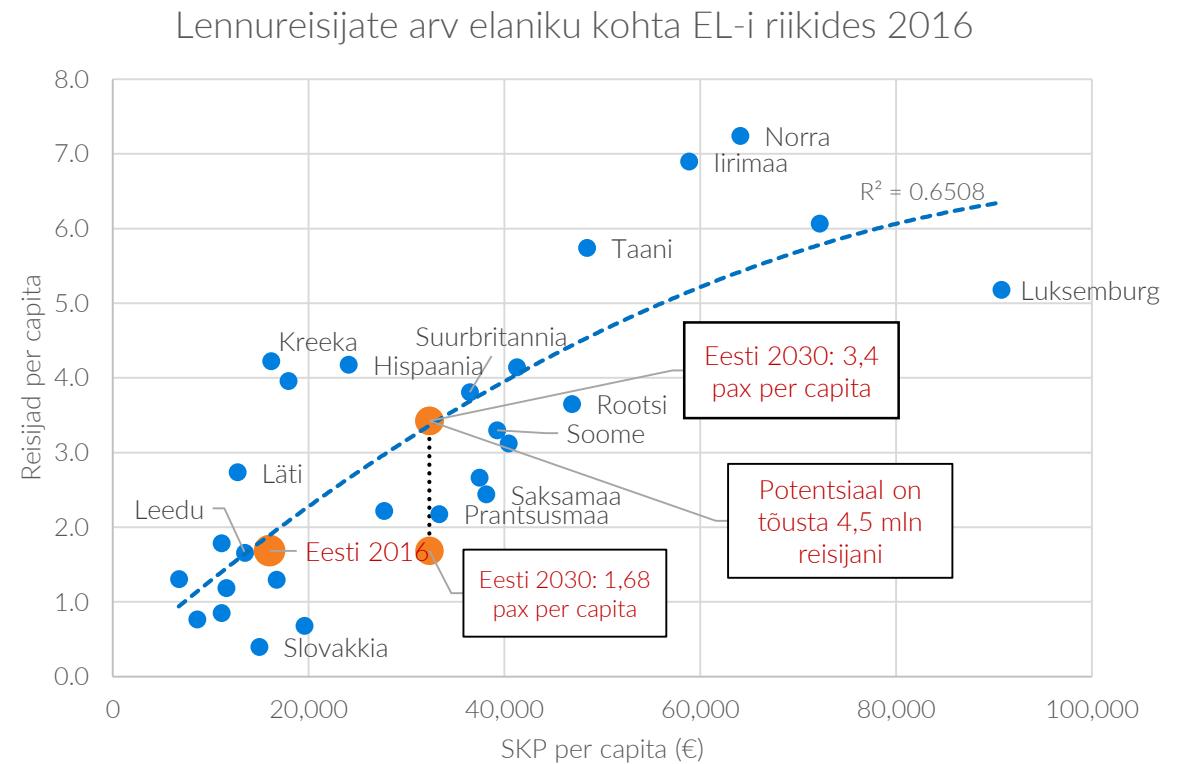
- Kaks suurimat vedajat teenindavad ca 1/3 turust
- Turuosa on suurendanud
 - Air Baltic
 - Ryanair
 - Wizzair
- LCC osakaal turust on 21%
 - 2018 kokku 17%



MIS ON EESMÄRK?

Potentsiaal pole ammendatud

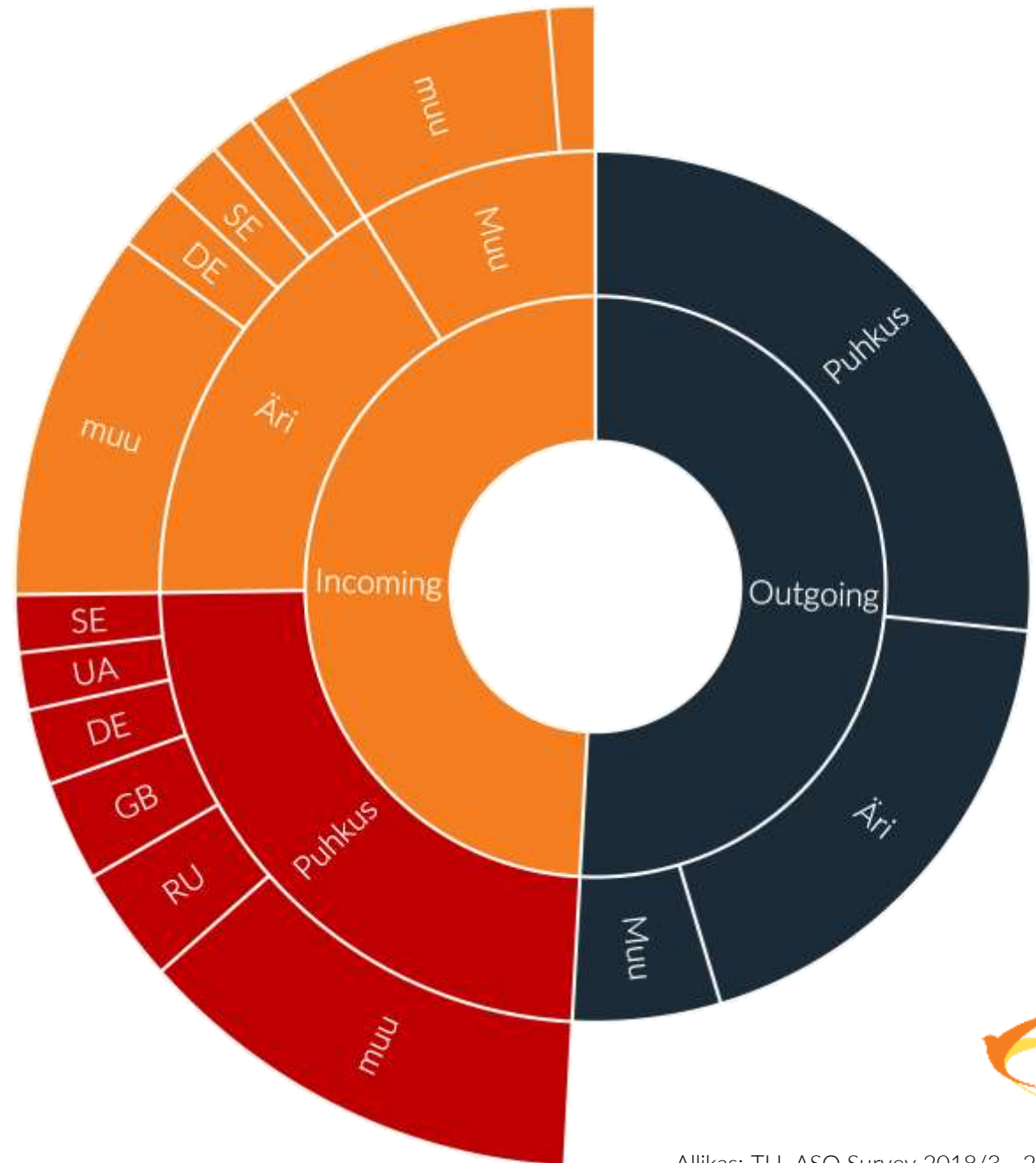
- Lennureisijate arv on seotud elatustasemega
- 2030. aastaks Eesti SKP inimese kohta kahekordistub, mis tähendab seda, et ka lennureisijate arv peab kasvama
- Võrreldes Kesk-Euroopa riikidega on Eesti kasvupotentsiaal suurem, sest suured turud ja suurlinnad asuvad meist kaugel, mis muudavad muude modaalsuste kasutamise väheatraktiivseks
- Hea tööga on potentsiaal kasvatada reisijate arvu 5 miljonini



Allikas: Eurostat

Millisel reisijasegmendil on suurim kasvupotentsiaal?

- Eesti *outgoing* potentsiaal (2018)*:
 - 410-450 tuhat inimest, ehk
 - Ca 2,1 miljonit edasi-tagasi reisijat aastas
 - Sõltub Eesti SKP ja sissetulekute muutusest
- *Incoming* puhkusereisijad:
 - Piiramatu potentsiaal
 - Sõltub otseühenduste olemasolust
 - Tallinn konkureerib kõigi Euroopa *city-break* sihtkohtadega





Tallinn Airport Route incentive scheme

Effective from 1 January 2016

1. Liinitoetusprogramm

Kes teeb: TLL
(peab olema olemas!)

- | | |
|----|--------------------------------|
| 07 | 2.2 New route incentive |
| 09 | 2.3 Growth incentive |
| 10 | 2.4 Inaugural flight incentive |
| 11 | 2.5 Operation-based incentive |
| 13 | 2.6 Volume-based incentive |



2. Teatud % täituvuse garanteerimine lennul (grupid) (reisikorraldajad)



airBaltic



3. Turunduskoostöö ja ühiskampaaniad (Kes teeb: EAS, KOV-d, TLL, liidud/MTÜd)

Ligipääs lennufirma kliendibaasile ja turundus-kanalitele (miljonid potentsiaalsed reisijad)



Lufthansa Magazin / Travel / Baltic boomtown

Baltic boomtown

TEXT — MATTHIAS BECKER
PHOTOS — CONSTANTIN MIRBACH
ILLUSTRATION — CRISTOBAL SCHMAL

Company founders and international investors are visiting Tartu in January for perhaps the Baltics' biggest startup convention. The eastern Estonian university city has become a startup hot spot almost overnight.

Lightening the daily load can start with taking out the trash. When one of his school friends complained about taking the garbage out at home, Joonatan Oras and three of his buddies dreamed up Wastefox, a balcony compost box. Oras was 16 then; today he's 20 and studying journalism and PR at Tartu University in Estonia. To make money, 25-year-old entrepreneur Joonatan Oras



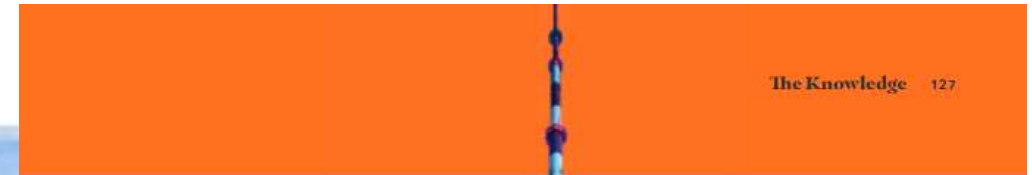
★ Travel · Estonia breaks

Why Tallinn was named Lonely Planet's Best Value destination 2018

Brought to you by visit estonia
BRITISH AIRWAYS
f share
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Shares 20



Capital gains: soak up the culture and heritage in t



1/ TELETORN

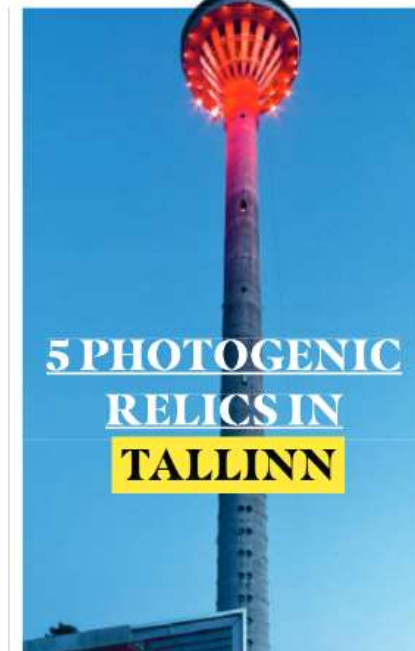
At 314m, Tallinn's TV tower (right) is Estonia's tallest structure. Zip up to the top and gawp over the city, local forests and across the Gulf of Finland. 58a Kloostrimetsa tee
Area: Laiaküla

2/ LINNAHALL

When Moscow had the 1980 Olympic Games, it needed somewhere to host the sailing competition and the place it chose was Linnahall (below), a now abandoned Brutalist hulk covered in many layers of graffiti. 4 Kalasadamäe
Area: Kalamaja

3/ CATHEDRAL OF ST MARY

The inside walls of this ancient cathedral are studded with more than 100 giant wooden epitaphs representing deceased local greats



5 PHOTOGENIC RELICS IN TALLINN



from centuries of the city's history. 6 Toom-Kooli
Area: Vanalinn

4/ KIEK IN DE KÖK

German for 'peek in the kitchen', since legend says the medieval-era soldiers stationed here could see into locals' kitchens from the top. It still offers great views and now it also houses a history museum (above). 2 Komandandi tee
Area: Vanalinn

5/ VÄIKE-ÕISMÄE

When this oval-shaped residential district was built in the late 60s, a half-hour bus ride from

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Ligipääs lennufirma kliendibaasile ja turundus-kanalitele (miljonid potentsiaalsed reisijad)

Lufthansa magazin

Other countries | Deutsch

Lufthansa

Feedback

Help

Q

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Travel | Estonia breaks

Why Tallinn was Best Value

The Knowledge 127

Riigiabi

Lufthansa Magazin | Travel | Baltic boomtown

Baltic boomtown

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GEN. TALLINN CITY MUSEUM

1/ KALASADAMA
A now abandoned Brutalist hulk covered in many layers of graffiti.
4 Kalasadama
Area: Kalamaja

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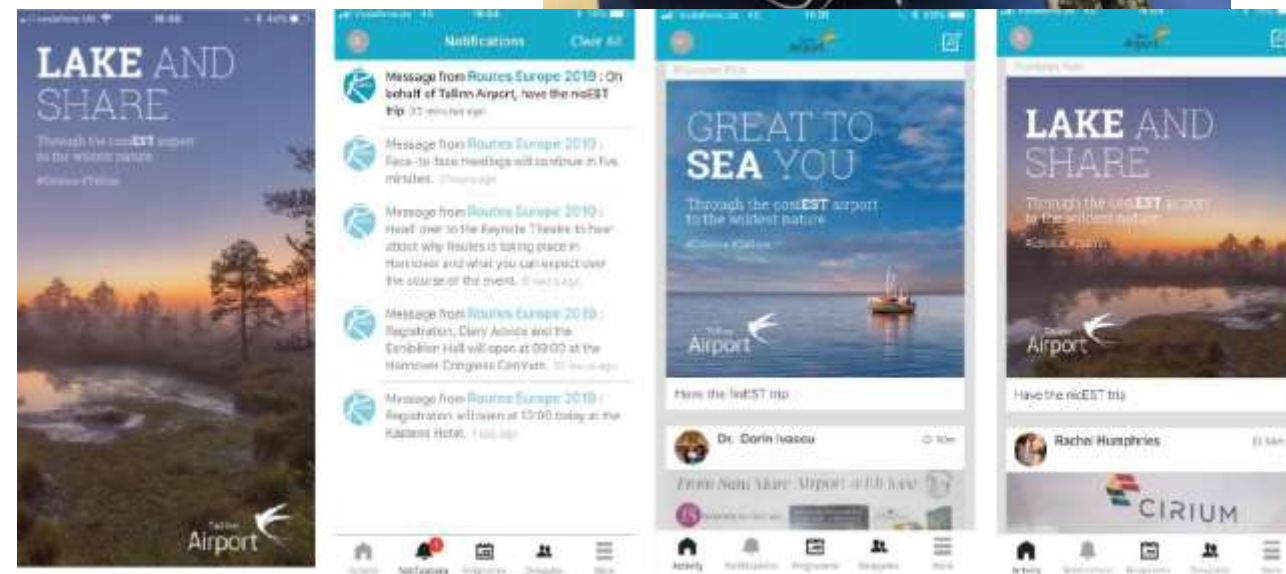
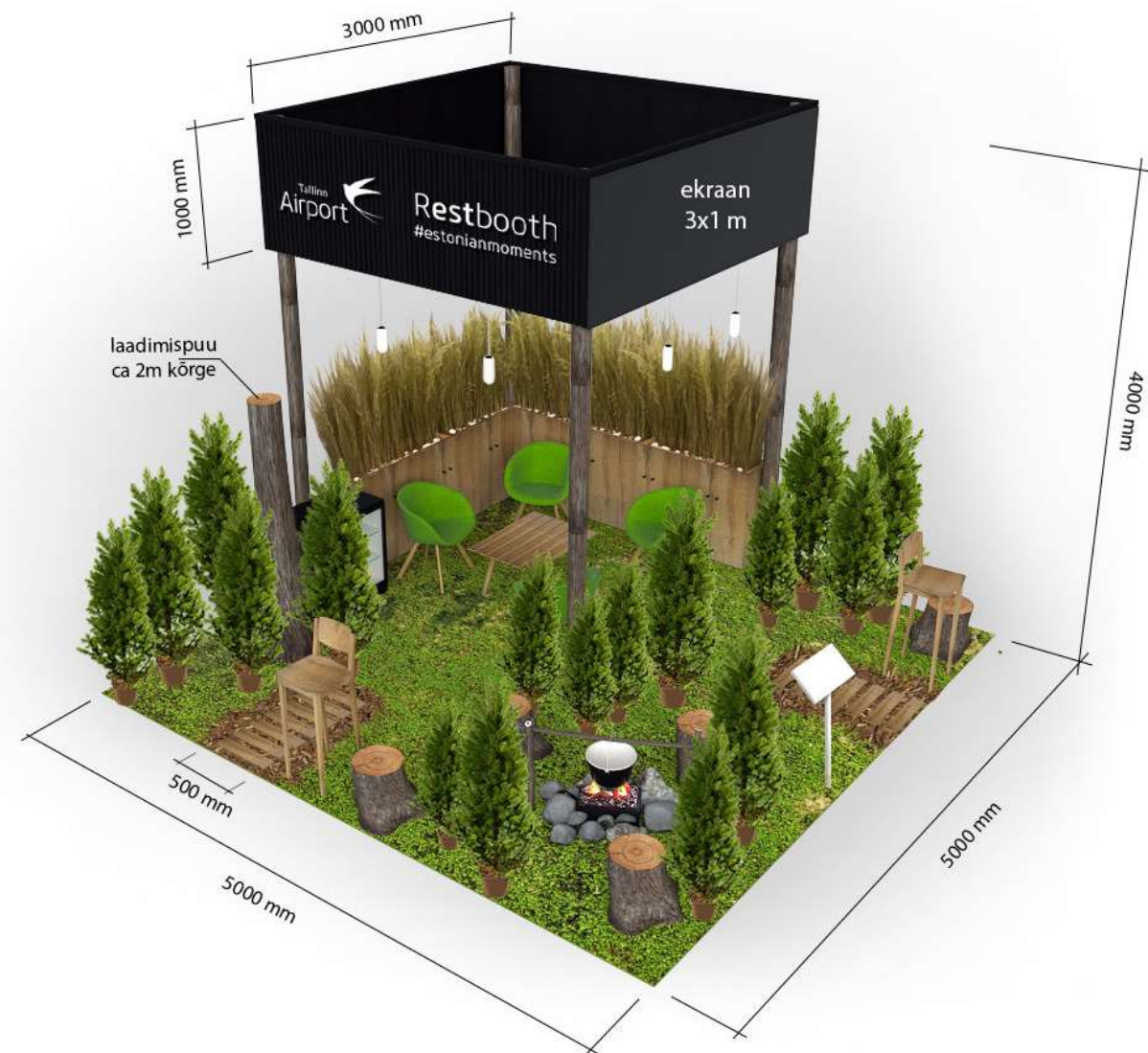


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4. Jõuline otsemüük – TLL+EAS+... (ukselt uksele, messid, digikanalid,)



5. Parema kvaliteediga analüütika

Skyscanner otsingud – TLL, RIX, HEL 2019

	Otsingud	Valikud
Tallinn	9 566 029	873 515
Riia	14 609 625	1 385 613
Helsinki	37 132 071	4 667 979
Vilnius	15 521 429	1 111 931

- TLL TOP lähi-ja kaugliinid

Lähiturg	Otsingud	Kaugturg	Otsingud
London	524 638	Bangkok	123336
Milano	464 260	Phuket	95775
Berliin	332 483	New York	91312
Amsterdam	266 903	Tokyo	74758
Moskva	244 174	Dubai	64999
Pariis	237 705	Hong Kong	52901
Stockholm	231 899	Bali	52452
Barcelona	203 373	Singapur	42488
Kiiev	198 746	Las Palmas	41654
Malaga	156 702	Seoul	40563

- RIX TOP lähi- ja kaugliinid

Lähiturg	Otsingud	Kaugturg	Otsingud
Moskva	909 929	Bangkok	187 880
London	755 691	New York	172 059
Milano	417 137	Bali	119 630
Barcelona	379 354	Dubai	93 912
Berliin	375 651	Phuket	77 566
Tel Aviv	341 931	Abu Dhabi	71 007
Amsterdam	270 647	Tokyo	62 170
Pariis	246 833	Los Angeles	61 684
Kiiev	245 640	Male	59 300
Dublin	240 742	Delhi	57 453

- HEL TOP lähi- ja kaugliinid

Lähiturg	Otsingud	Kaugturg	Otsingud
Berliin	1 020 543	Bangkok	1 015 780
Barcelona	986 070	Hong Kong	606 374
London	972 924	Tokyo	570 241
Amsterdam	961 258	New York	570 224
Malaga	918 076	Dubai	410 290
Pariis	742 935	Phuket	356 405
Rooma	632 829	Miami	355 481
Lissabon	559 771	Seoul	351 956
Stockholm	545 032	Bali	332 731
Rovaniemi	543 159	Singapur	330 977

Kaugliin – üle 4000 km

6. Väärtusahela põhine ja riikidevaheline koostöö

POTENTIAL VALUE PROPOSITION



Incentives and support package

TLL and VNO incentive packages, non-aeronautical support mechanisms, marketing and airline brand awareness proposal



Stakeholders' commitment

State support mechanism and stakeholders support:

- De Minimis, Minimum revenue guarantee and others.
- Marketing support tenders
- Local corporate interest



Estonia-Lithuania awareness campaigns

Activities based on inbound tourism attraction from the target market:

- Tourism board and tourism organisations' activities in the destination market
- Tourism fairs in the market, Fam trips

Teeme ära!

1. Lennujaam uuendab 2020 liinitoetusprogrammi
 - Uued hinnavõrdluse tööriistad
2. Turundustoetuse programmid tuleb tööle saada (vaatama riigiabi hirmule)
3. EAS-TLL käivitavad 2-3 ühisturundusprojekti
4. Rohkem infovahetust sektori ja lennujaama vahel:
 - a) Olemasolevate liinide toimimine
 - b) Uute võimalike sihtkohtade müümine lennufirmadele



BUSH YOUR LIMITS

Through the cosi**EST** airport
to the wildest nature

#Estonia #Tallinn

