

EXECUTIVE SUMMARY

Sustainability is a global trend and affects everyone. The 2030 global agenda for sustainable development, adopted by the heads of state and government at the UN summit in 2015, includes 17 goals covering all areas of life. In Estonia, these are implemented through sector development plans and programs which are based on the long-term strategy „Estonia 2035“. Estonia's targets are divided into the following categories: individual, society, living environment, economy, and public governance. Sustainability encompasses well-being in all of these dimensions.

According to the World Tourism Organization (UNWTO), tourism can be considered sustainable if it „takes full account its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities“ ([UNWTO, „Tourism in the 2030 Agenda“](#)). The organization describes three main objectives of sustainable tourism: 1) make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity; 2) respect for the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance; 3) ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation ([UNWTO, „Sustainable Development“](#)). This study is based on this definition of sustainable tourism. By pursuing the goals of sustainability, the Estonian tourism sector can contribute to the long-term well-being of the environment and society.

The aim of this study is to formulate recommendations for use in policy making in the Estonian tourism sector and for tourism service providers in transitioning to sustainable tourism (green transition). To do this, we looked at global trends and developments in tourism and regulations affecting the tourism sector, as well as best practices of sustainable tourism in foreign countries. We also examined how Estonian tourism service providers perceive sustainable tourism, as well as their readiness and capacity to implement sustainability principles, and their needs for support in transitioning to more sustainable operations. Thus, the study has two research tasks:

1. determine the current situation of the Estonian tourism sector (awareness, readiness, capabilities, obstacles, solutions) from the perspective of sustainable tourism;
2. draw conclusions and provide recommendations on how the government could support tourism service providers in contributing to sustainable tourism.

To fulfil the set research tasks, we used quantitative and qualitative methods in two stages:

Stage I: document analysis; analysis of sustainable tourism practices in five countries (Finland, Sweden, Slovenia, Switzerland, New Zealand); a survey among tourism service providers.

Stage II: focus group interviews with tourism service providers, destination management organizations' representatives, policy makers, and tourism associations' representatives; individual interviews with sustainability experts outside the sector; discussion seminars with sector stakeholders to receive feedback on preliminary recommendations.

As a result of the synthesis of the material collected in these stages, we made conclusions and recommendations for the tourism sector to achieve sustainability:

CONCLUSIONS	RECOMMENDATIONS
<p>1. Higher awareness and better choices in terms of sustainable tourism among travel organizers and event organizers serving business clients can lead to synergy in the implementation of sustainable principles in the tourism sector at large</p>	<p>In the short term, over a couple of years, focus should be on raising the awareness of and increasing support for those tourism companies who already rely the most on sustainability criteria to drive their operations (and potentially lead to synergy in the implementation of sustainable principles in other tourism service providers)</p>
<p>2. Awareness of sustainable tourism is lower among small and rural tourism service providers, who are also particularly affected by the seasonality of tourism and the crises of recent years. there are difficulties in finding and retaining permanent employees, therefore, a lack of time and resources does not allow to implement the principles of sustainability</p>	<p>In the long term, over a 10-year perspective, attention should be paid to supporting small and rural tourism service providers</p>
<p>3. The awareness and understanding of sustainable tourism in the tourism sector is uneven and incomplete</p>	<p>Formulate sustainability goals that address the entire tourism sector, based on the sector's major impacts (environmental, social, economic) and the development expected from the sector to achieve these</p>
	<p>Create sector-specific (accommodation, catering, nature tourism, etc.) Guidelines and a „myth buster“ for the implementation of sustainable principles</p>
	<p>Conclude "goodwill agreements" within each area of activity</p>
	<p>Ensure that sustainability is a pervasive theme in all tourism sector service design and product development trainings or development programs, and encourage and support participation in sustainability training programs</p>
	<p>Integrate sustainability topics (environmental, social, economic level) as skills and knowledge into tourism curricula</p>
<p>4. Lack of resources hinders tourism service providers on the path to sustainability</p>	<p>Support tourism service providers on the sustainable tourism journey: raising awareness of sustainability and international standards, self-analysis, creating a sustainability action plan, applying for an internationally recognized label relevant to the area of activity, and creating a network, taking advantage of existing opportunities and services, and offering support</p>

	both at the local level (through DMOs) and centrally at the state level (Enterprise Estonia)
5. Waste management and circular economy pose challenges to tourism service providers, who feel unable to make changes independently	Ensure the functioning of a circular economy supporting infrastructure in Estonia and its accessibility to tourism service providers
6. Small and rural tourism service providers especially do not know how to communicate their sustainable steps	Provide advice and support on how to do this, for example by providing templates on how and what to highlight in sustainability marketing
7. In addition to meeting customer expectations, resource saving, and higher revenues, companies are most motivated to operate sustainably by the example of and the sharing of experiences with other companies (e.g., networks of sustainable companies)	Create opportunities for companies to exchange knowledge and experience
8. To achieve broader change, recognition and marketing of sustainable companies is expected, as well as support in the form of tax benefits or support measures	Public sector institutions and local governments should follow sustainability criteria when organizing procurements and distributing subsidies
9. Companies believe that the areas with the greatest environmental impact are energy and transport infrastructure, which also require the most resources and state support	The biggest need for investment is in improving energy efficiency (including investments in renewable energy generation and connection charging capacity, renovation of buildings, replacement of energy-intensive equipment) and providing accessible and sustainable transport infrastructure
	The state could support other solutions associated with transitioning to more sustainable operations – replacement of vehicles, acquisition of more suitable waste containers, insulation of buildings, etc. (for example, the tourism sector could benefit from the carbon quota market), especially for small and rural tourism service providers
10. Preservation of cultural heritage is underfunded	Invest in and support the sustainable renovation and preservation of cultural heritage and cultural infrastructure, especially in rural areas and for privately owned objects