



Tourism Action Plan 2026–2029

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The following abbreviations are used in this document:

1. DMO – destination management organisation
2. EHRL – Estonian Hotel and Restaurant Association
3. EIS – Enterprise and Innovation Foundation
4. ECB – Estonian Convention Bureau
5. ELTÜ – Estonian Nature Tourism Association
6. ETCB – Estonian Tax and Customs Board
7. HTM – Ministry of Education and Research
8. JDM – Ministry of Justice and Digital Affairs
9. KLIM – Ministry of Climate
10. KUM – Ministry of Culture
11. MKM – Ministry of Economic Affairs and Communications
12. PBGB – Police and Border Guard Board
13. RAM – Ministry of Finance
14. REM – Ministry of Regional Affairs and Agriculture
15. RMK – State Forest Management Centre
16. SIM – Ministry of the Interior
17. CPTRA – Consumer Protection and Technical Regulatory Authority
18. VÄM – Ministry of Foreign Affairs

Introduction

Tourism is an important economic sector for Estonia, accounting for approximately 7%¹ of gross domestic product in 2023, including indirect effects, and constituting a significant share of service exports. Tourism also has a major economic impact on other sectors; it shapes Estonia's image abroad and helps maintain transport links with other countries, balances regional development, and provides jobs, which, for many, represent their first opportunity to enter the labour market.

In February 2025, the Minister of Economic Affairs and Industry approved a comprehensive development document for the tourism sector, the Long-Term Outlook for Estonian Tourism 2025–2035² (hereinafter the Long-Term Outlook), which defines the vision, long-term objectives, and strategic directions for the tourism sector. The Long-Term Outlook serves as the overarching document for the preparation of four-year strategies, or action plans, for the tourism sector.

This action plan describes what needs to be done in the period 2026–2029 in order to achieve the objectives set out in the Long-Term Outlook. It also sets out who is responsible for implementing the actions, how to measure their effectiveness, and the financial requirements for carrying out the planned activities.

The action plan was drawn up in collaboration with the private sector, ministries, and various agencies. The action plan helps ministries, agencies, DMOs, business representative organisations, businesses, and other stakeholders to plan and prioritise their resources, decisions, and activities over the next four years.

¹ [Analysis of the regional impact of tourism in Estonia in 2023. Ministry of Economic Affairs and Communications, 31 December 2024.](#)

² [The Long-Term Outlook for Estonian Tourism 2025–2035.](#)

1. Vision and objective

The action plan is based entirely on the Long-Term Outlook, objectives, and strategic directions. **The vision** is that by 2035, Estonia will be a well-known, sustainable, and innovative destination offering tourism products (also referred to as ‘tourism services’ in the text) that meet expectations, with the added value of tourism having doubled. **The objective** is to raise awareness by turning Estonia’s unique characteristics into a competitive advantage through smart marketing and to ensure that the Estonian tourism sector is efficient, digitally advanced, sustainable and hospitable, offering authentic tourism products across Estonia all year round and ensuring high levels of satisfaction among both local residents and tourists.³

In order for us to be able to say in 2035 that we have realised our vision and achieved our set goal, the added value of tourism must have doubled, and the satisfaction of residents and international visitors must have increased.⁴ In order to reach these targets, a number of significant interim results must first be achieved. The desired results for the years 2026–2029 are shown in the ‘2029 target level’ column of the table below, alongside a comparison with the baseline and long-term goals.

Key indicators	Long-term baseline 2023	Target 2029	2035 target	Explanation
Added value of tourism, direct and indirect impact (Statistics Estonia)	€2.2 billion	€3.248 billion	€4.3 billion	Calculated using the same method as for the indicators in the ‘Long-term Economic Policy Plan 2035’ ⁵
Estonian residents’ satisfaction with tourism	Not available	To be determined	To be determined	The indicator is planned to be developed in 2025–2026 and incorporated into the Ministry of Regional Affairs and Agriculture’s local resident satisfaction survey, which is conducted every two (2) years, with the next one taking place in 2026
Foreign visitors’ satisfaction with tourism services in Estonia (EIS, % of foreign tourists who would recommend visiting Estonia to friends)	73	73	75	As the current target level for this indicator is already high, the aim at present is primarily to maintain the existing high level rather than achieve a sharp increase. The border survey will be conducted once during the strategy period, i.e. in 2027.

³The Long-Term Outlook for Estonian Tourism 2025–2035, Annex 1, p. 5.

⁴The Long-Term Outlook for Estonian Tourism 2025–2035, Annex 1, p. 14.

⁵[Economic Plan | Ministry of Economic Affairs and Communications](#). In brief: The added value of tourism (direct and indirect impact) is a macro-indicator based on the tourism satellite account methodology, which shows the new economic value created for the Estonian economy by tourism-related enterprises (profit, labour costs, depreciation and most of the state’s tax revenue), taking into account both the direct impact arising from the expenditure of domestic and foreign tourists and the indirect impact manifested through supply chains. The target set in the action plan – an increase in the added value of tourism of approximately €1 billion over four years – is based on a forecast that takes into account the growth in turnover of tourism businesses, the expansion of higher value-added segments (particularly business tourism) and their prioritised development, higher average spending and longer stays by tourists, and, among other things, an expected rise in price levels.

In addition, the Long-Term Outlook also specifies more detailed outputs and their indicators separately for each of the five action areas, or, so to speak, for each block of activities. The specific outputs, indicators, and target levels for the action blocks are set out in the chapter on activities.

In order to fulfil the described vision and objective, the Long-Term Outlook identifies reliance on five pillars of action, or essentially, **action across five areas of activity**.⁶

Vision: By 2035, Estonia will be a sustainable and innovative destination renowned for tourism products that meet expectations, with the added value of tourism having doubled		Objective: The added value of tourism, including its direct and indirect impact, will be €3.248 billion by 2029		
1. Estonia is a year-round attractive tourist destination	2. Seamless and diverse transport and digital connectivity	3. Diverse, hospitable, and vibrant tourism beyond key centres supports local development and engages communities	4. Tourism is a stable and profitable business sector and a reputable career opportunity with good working conditions for employees	5. A smart, innovative, and sustainable tourism sector
The focus is on developing, marketing, and supporting products in the areas of business, food, cultural, heritage and nature tourism.	The focus is on securing new and more frequent direct flights and improving digital connectivity.	The focus is on cooperation between DMOs, which supports businesses in developing local services and making them more accessible via digital channels, with the aim of increasing the added value of tourism in the region.	The focus is on improving tourism education, streamlining and simplifying tourism regulations, and tackling the shadow economy.	The focus is on supporting innovation, digitalisation, and automation in the tourism sector, improving data accessibility, and resolving issues in the food supply chain.
Desired outcome for 2029: exports of tourism services have grown from €1.86 billion to €2.7 billion, and the share of business tourism has increased from 23.3% to 24.5%.	Desired outcome for 2029: air connections have become more frequent, and 65% of the tourism services listed in the VisitEstonia information system can be booked online in real time (previously 37%).	Desired outcome for 2029: the proportion of overnight stays outside Tallinn is at least 53%.	Desired outcome for 2029: added value has increased (from €21,839) to €34,920 per person employed.	Desired outcome 2029: digital capacity has increased, and investment in intangible fixed assets has doubled.

Key desired changes:

existing cross-sectoral cooperation will become even closer and more targeted – we will focus on attracting higher value-added tourists to Estonia, invest more than before in creating new international partnerships, and develop the digitalisation of the visitor journey and new business models

⁶ Ibid., Annex 1, p. 4 (and in more detail on pp. 15–23).

2. Actions required to fulfil the objective and achieve results

To achieve the set objectives, all parties involved in tourism must contribute – including government agencies, businesses, professional associations, and other organisations. **The action plan for the period includes marketing activities, developing connectivity, supporting product development, business development activities** (i.e. what businesses do themselves), **and shaping the business environment** (i.e. what the state does).

All activities must consistently focus on sustainability and accessibility, whilst maintaining a balance between seasons and regions. Marketing activities in target countries are carried out on a data-driven basis, and target countries are selected taking into account export revenue from travel services, transport connectivity, the number of overnight stays during the low season, regional factors, and the cost of marketing activities. Marketing activities utilise smart technological solutions that help understand visitors' expectations even before their arrival. Overseas marketing activities are based on the messaging strategy '*Estonia. It's about time*'.

In addition to the activities outlined in the action plan, the Enterprise and Innovation Foundation (EIS) and the Ministry of Culture and the Ministry of Economic Affairs and Communications (MKM) also carry out other necessary activities in the light of the Long-Term Outlook for tourism and the implementation of the action plan, as derived from these documents, such as EIS target market studies, the conduct of a survey of conference delegates, and the conduct of a border survey of foreign visitors, which provide important input for monitoring the action plan.

2.1. Strategic Pillar No. 1: Estonia is a year-round attractive tourism destination

To ensure that Estonia is a year-round attractive tourism destination, it is necessary to develop a tourism offering that meets international expectations, provides higher added value, and utilises smart marketing strategies. It is also important to extend the length of stays, reduce seasonality, and increase tourism revenue.

The focus is on the development, marketing, and support of business, food, cultural and nature tourism products, resulting in tourism service exports growing to €2.7 billion by 2029 and the share of business tourism increasing to 24.5%.





Photo: Tanel Meos

As a result of activities in the 2026–2029 period, foreign tourists will stay here more often than before for business trips, meaning the share of business tourism will increase; expenditures of foreign residents in Estonia and payments to Estonian transport companies will rise; and the seasonality of tourism will decrease:

Key indicators	Explanation	Long-term baseline 2023	Target level 2029	Long-term target 2035
Share of business tourism (Statistics Estonia)	Shows the proportion of overnight tourist stays related to business travel	23,3%	24,5%	27%
Exports of tourism services (Statistics Estonia)	Shows how much foreign residents spent in Estonia and how much they paid to Estonian transport companies	€1.859 billion	€2.7 billion	€3.9 billion
Seasonality of tourism (Statistics Estonia)	Ratio of the total number of nights spent in the three months with the highest number of nights spent in accommodation establishments to the total number of nights spent in accommodation establishments in a year	37%	36,5%	35%

Activities supporting the outputs of the first pillar:

Type of activity	Activity	Responsible party(ies)	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
1 Product development and entrepreneurship	We are beginning preparations for the construction of a multifunctional major events venue that meets international demand	KUM	<ul style="list-style-type: none"> • MKM • business 	Preparations have begun for the construction of a cultural and sports events hall of sufficient size and functionality to meet the needs of event tourism, which is also suitable for hosting conferences at an international level, amongst other things. A preliminary analysis of the business plan and a location analysis for the construction of the major events venue will be completed by the end of 2026. To finance the hall, amendments have been made to the Gambling Tax Act, among other things, and a fund for supporting sports facilities of national importance has been established under the Estonian Cultural Endowment.
2 Product development and entrepreneurship	We will launch the development of Tallinn City Hall into an international concert and conference centre, developing a spatial and financial model and commencing phased implementation	Tallinn City and businesses		In cooperation with the private sector, a solution has been found to the issue of establishing an international conference centre, and the reconstruction of the City Hall has been launched as a construction phase.
3 Product development, business environment	We will continue to implement the programme for applying for the right to host international conferences, the aim of which is to bring international conferences to Estonia (for example, by covering the costs of preparing promotional materials, participating in conferences to apply for hosting rights, and conducting site visits)	ECB EIS	<ul style="list-style-type: none"> • MKM 	Estonia ranks 42nd in the International Congress and Convention Association (ICCA) rankings (44th in 2024)
4 Entrepreneurship	We will continue to develop high value-added products (cultural, heritage, nature, business and food tourism products) to meet the expectations of international visitors, i.e. we will primarily offer higher quality products, including during the low season, to increase added value and tourism revenue	Businesses	<ul style="list-style-type: none"> • EIS • KUM • DMOs • business representative organisations 	<p>The foreign visitor recommendation index is 73 (the baseline is 73 in 2024).</p> <p>The proportion of overnight stays in the spring, autumn and winter months has increased to 65% (compared to 63% in 2023 and 2024)</p>

5 Type of activity	Activity	Responsible party(ies)	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
5 Marketing	We will continue our marketing activities. We will promote Estonia primarily as a destination for business, nature, cultural, heritage and food tourism through up-to-date messaging, including campaigns, networking events, public relations and communications. Depending on the specifics of target markets and target groups, we will also continue to market other sectors, such as health and wellness tourism, and attraction tourism	• EIS	• DMOs • businesses • business representative organisations • VÄM	Exports of travel services from the main target markets (15) have grown to €1.5 billion by 2029 (€1.19 billion in 2024). In 2029, the number of international media mentions is 1,500 and the reach 700 million (1,200 and 620 respectively in 2024)
6 Marketing	We will market Estonia more than ever before as a destination for international conferences and corporate events	• EIS	• ECB • DMOs • businesses • VÄM	The share of overnight stays by foreign business travellers out of all overnight stays by foreign tourists in accommodation establishments will reach 24.5% by 2029 (for comparison, the baseline in 2023 is 22.6%)
7 Marketing	We will continue B2B tourism promotion activities in target markets and share information about Estonia with tourism professionals at networking events	• EIS	• DMOs • businesses • business representative organisations • VÄM	500 new and/or updated products featuring Estonia as a destination in the product portfolios of tour operators in foreign markets, and 2,500 informed resellers. 2024 baseline: 100 new products and 500 informed resellers per year.
8 Product development	We are investigating additional funding needs and opportunities to support the development of other key tourism sectors (e.g. attraction tourism) and to carry out marketing activities on a larger scale than at present	• MKM		The need for funding and the possibilities for obtaining it have become clear.
9 Marketing, business environment	We will implement the activities outlined in the digital nomad visa strategy to attract more international remote workers to Estonia	• EIS	• MKM • PBGB • SIM • VÄM	By 2027, there will be more digital nomads in Estonia; specific targets and indicators are set out in the digital nomad visa strategy (to be finalised in December 2025)



	Type of activity	Activity	Responsible party(ies)	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
10	Product development	Jätkame suure välisosalejate arvuga mitmepäevaste rahvusvaheliste konverentside toetamist.	• EIS		Between 2026 and 2028, funding will be provided for at least 15 international conferences per year (in 2025, funding will be provided for 15 conferences per year)
11	Product development and marketing	Jätkame rahvusvaheliste kultuuri- ja spordisündmuste toetamist ning Eesti turundamist rahvusvahelistel kultuuri- ja spordisündmustel.	• EIS	• MKM • KUM	The number of foreign visitors to supported events has increased. Events supported by MKM will generate at least 140,000 overnight stays by international visitors in 2026–2029 (for comparison: in 2022–2025, the number of international visitors to events supported by MKM was 135,000)
12	Product development	We will implement food tourism development and cooperation activities, including those related to international quality labels, and continue efforts to ensure the availability of the Michelin Guide in Estonia	• Businesses • EHRL • Estonian Chefs' Association • Estonian Sommeliers' Association	• EIS (through development support)	At least 80% of visitors from neighbouring countries (visiting restaurants and cafés) rate the value for money of the dining experience as good or very good. (75% in 2023) Annual turnover of restaurants recognised with an international quality label will increase by approximately 10% in additional annual turnover. There are 13 restaurants with an international quality label outside Tallinn (10 in 2024).

2.2. Strategic Pillar No. 2: Seamless and diverse transport and digital connectivity

It is important to develop international connections suitable for foreign tourists (transport options for travelling to Estonia), internal mobility within Estonia (improving domestic travel routes, multimodal transport solutions and options for planning journeys further in advance, including low-carbon modes of transport), digital connectivity (availability and visibility of tourism information and products on digital channels), and equal access.⁷

The focus is on securing new and more frequent direct flights and improving digital connections so that more tourism services than before can be booked online in real time.



As a result of these activities, it will be possible to travel from Tallinn by direct flight to more destinations (39) on a regular basis. Flight connections with the rest of the world will become more frequent during the low season, as will travel by ferry:

Key indicators	Explanation	Long-term baseline 2023	Target level 2029	Long-term target 2035
Number of destinations served by regular international direct flights from Tallinn in weeks 2 and 24 of the year (AS Tallinn Airport)	Shows the number of destinations from which it is possible to fly directly to Estonia during the low and high seasons	32/32	36/39	42/50
Number of international scheduled direct flights departing from Tallinn in weeks 2 and 24 of the year (AS Tallinn Airport)	Shows the frequency of flight connections between Estonia and the rest of the world during the low and high seasons	242/273	290/340	370/450
Number of passengers arriving from and departing to foreign countries by ship (excluding cruise ships) via ports (Statistics Estonia)	Indicates the frequency of travel to and from abroad by ship	7.9 million	9 million	10 million

⁷The Long-Term Outlook for Estonian Tourism 2025–2035, Annex 1, p. 16.

Activities supporting the outputs of the second pillar:

Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
13	Connectivity	We will continue joint marketing activities through the larger Route Development Fund Programme in cooperation with international transport companies to ensure better direct connections to Estonia, including air links, Rail Baltica, etc.	<ul style="list-style-type: none"> EIS KLIM (supports airport development), Tallinn Airport 	Joint marketing cooperation is being carried out with 6–8 transport companies (i.e. 1–2 have been added). Three new routes have been added and the frequency of up to six routes has increased.
14	Connectivity, product development and marketing	We will continue to develop the tourism information system VisitEstonia/PuhkaEestis to increase the international visibility of Estonian tourism businesses, integrate the information system with various applications and platforms, and create added value for businesses to develop their operations and conduct international marketing activities	<ul style="list-style-type: none"> EIS 	Foreign visitors' satisfaction with the availability of information on www.visitestonia.com is at least 4.3 out of 5 (data from visitestonia.com), 4.0 in 2024. 65% of tourism services listed on the VisitEstonia/PuhkaEestis information system can be booked online in real time (as of May 2025, the proportion of services bookable online in the VisitEstonia database was 37%)
15	Entrepreneurship	We will make tourism services bookable online by implementing resource management software and online booking systems	<ul style="list-style-type: none"> Businesses EIS 	65% of tourism services in the VisitEstonia/PuhkaEestis information system can be booked online in real time (as of May 2025, the proportion of services bookable online in the VisitEstonia database was 37%)
16	Marketing	We will increase the digital visibility of services and ensure that information is presented in digital channels in up-to-date and visitor-friendly languages	<ul style="list-style-type: none"> Businesses DMOs 	Foreign visitors' satisfaction with the availability of information on www.visitestonia.com at least 3.9/5 (data from visitestonia.com)
17	Business environment	We will draw up a development concept for small harbours and implement the measures outlined therein to promote the development of tourism services in small harbours	<ul style="list-style-type: none"> KLIM MKM DMOs local authorities 	A high-quality database of small harbours is in place. Small harbours can make use of national support measures to develop services. The Ports Act and related legislation have been amended to enable small harbours to offer tourism services and construct suitable facilities for this purpose.

	Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
18	Connectivity	We are developing international and domestic travel, cruise ship and rail connections	<ul style="list-style-type: none"> • KLIM • REM 	<ul style="list-style-type: none"> • Local authorities, • businesses 	<p>Domestic and international rail connections (speed, frequency) have improved and transport capacity has increased; notably, the Tartu—Riga rail line (KLIM) has been opened with support from the state budget (in 2024, passengers made 7,933,991 domestic journeys by train).</p> <p>The ferry service between Saaremaa and the mainland has improved — transport capacity has increased (in 2024, 17,112 journeys were made on the Virtsu—Kuivastu route)</p>
19	Connectivity	We will create or improve public transport routes to destinations of high tourist interest	<ul style="list-style-type: none"> • REM 	<ul style="list-style-type: none"> • Transport Administration, • KLIM, • businesses, • local authorities 	65% of overnight foreign visitors rate public transport connections in Estonia as good or fairly good, according to the foreign visitor border survey (the baseline for 2023—2024 is 61%)
20	Connectivity	We are developing a multimodal mobility service and ticketing system tailored to passengers' needs	<ul style="list-style-type: none"> • REM 		A ticketing system that is at least partially unified has been established, where the same ticket products/channels can be used on both public and commercial routes, regardless of the mode of transport
21	Connectivity	We enable the option to purchase tickets in advance for domestic ferry and train connections	<ul style="list-style-type: none"> • REM 	<ul style="list-style-type: none"> • Operators, • Transport Authority 	On domestic routes, it is possible to purchase tickets at least six months before the journey takes place
22	Business environment	We are implementing the Estonian National Cycling Strategy and the corresponding implementation plan for 2025—2029.	<ul style="list-style-type: none"> • Transport Agency 	<ul style="list-style-type: none"> • KLIM • local authorities • and other partners involved 	The role of the cycling tourism coordinator has been defined, and the division of responsibilities for developing cycling tourism has been agreed upon. Cycling tourism routes have been signposted and updated. Public awareness of cycling tourism has increased. The integration of cycling and public transport has improved
23	Connectivity	We are developing demand-responsive and other innovative transport solutions to reach tourist attractions from existing transport hubs	<ul style="list-style-type: none"> • Businesses 	<ul style="list-style-type: none"> • Local authorities • DMOs 	By 2029, seven tourism products featuring sustainable and innovative transport solutions (one per DMO) will be showcased as best practices

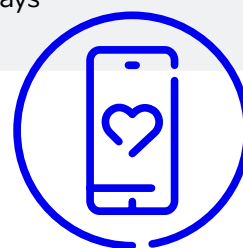


24 Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator <small>(as at 31 December 2029, unless otherwise stated)</small>
Connectivity	We will carry out a socio-economic impact assessment of the impact of ferry fares on, among other things, freedom of enterprise and tourism, to ensure that fares comply with the law and market conditions	<ul style="list-style-type: none"> • REM 		The impact of ferry crossing fees on business and tourism has been assessed for 2026, enabling knowledge-based decisions to be made regarding the introduction of ferry fees and their levels.
25 Product development	We will develop accessible tourist routes and make information about these routes available	<ul style="list-style-type: none"> • DMOs 	<ul style="list-style-type: none"> • EIS • businesses 	Information on accessible tourism products and routes is available in the VisitEstonia database and other information channels, as well as in DMOs' information channels
26 Product development	We will raise awareness of the economic potential and opportunities for developing accessible and inclusive tourism	<ul style="list-style-type: none"> • EIS • DMOs 	<ul style="list-style-type: none"> • MKM • business representative organisations 	At least eight seminars on accessibility issues have been organised

2.3. Strategic Pillar No. 3: Diverse, hospitable and vibrant tourism beyond key centres supports local development and engages communities

To ensure that tourism is diverse, hospitable and vibrant even outside of major centres, and supports the development of local life, the focus must be on dispersing international tourists across Estonia and developing regions or tourism products with significant tourism potential.⁸

The focus is on cooperation between DMOs, which supports businesses in developing local services and making them more accessible via digital channels, with the aim of increasing the added value of tourism in the region. By 2029, the proportion of overnight stays outside Tallinn will be at least 53%.



The planned activities are aimed at developing regional tourism, raising awareness of tourism, and involving local communities in tourism development. The aim is to develop distinctive destinations that offer year-round high-quality and sustainable tourism experiences and increase regional economic benefits.

As a result of these activities, the proportion of overnight stays outside Tallinn will increase, and the number of internationally recognised tourist destinations (e.g. those recognised with quality labels such as Green Destination, EUROPARC, UNESCO Biosphere Reserve, etc.) will grow:

Key indicators	Explanation	Long-term baseline 2023	Target level 2029	Long-term target 2035
Proportion of overnight stays outside Tallinn (Statistics Estonia)	The proportion of overnight stays outside Tallinn indirectly indicates the extent to which the economic impact of tourism extends beyond Tallinn	52%	53%	55%
Number of internationally recognised tourist destinations (accreditations from quality certification organisations)		10	15	All destinations (covering the whole of Estonia)

⁸The Long-Term Outlook for Estonian Tourism 2025–2035, Annex 1, p. 18.

Kolmanda samba väljundeid toetavad tegevused:

	Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
27	Business environment	We will continue to support DMOs based on public-private partnerships and strategic cooperation to increase the added value of businesses in the region, whilst DMOs are clearly moving towards increasing their own contribution to the budget (i.e. becoming less and less dependent on state support)	<ul style="list-style-type: none"> • EIS • DMOs 		Through the development of a holistic visitor experience and regional tourism products, the added value of businesses will increase across regions. The direct and indirect impact of tourism in terms of added value in 2029 will be €3.248 billion (the baseline in 2023 was €2.2 billion)
28	Business environment	We manage destinations holistically, based on the principles of the Long-Term Outlook for Estonian Tourism, the region's unique characteristics and messaging strategy, and we carry out collaborative product development and marketing.	<ul style="list-style-type: none"> • DMOs 		The share of overnight stays outside Tallinn in 2029 will be 53% (the baseline for 2023 was 52%)
29	Product development, marketing	We systematically develop entrepreneurship, business awareness, business models, sales capabilities and hospitality, with a primary focus outside of Tallinn	<ul style="list-style-type: none"> • Entrepreneurs, professional associations 	<ul style="list-style-type: none"> • DMOs, • County Development Centres 	The proportion of overnight stays outside Tallinn in 2029 will be 53% (the baseline in 2023 was 52%)
30	Business environment	We are raising awareness of the importance of tourism and its wider impact. We are promoting the tourism sector as a lucrative and prestigious profession and business sector, including in the media and on social media	<ul style="list-style-type: none"> • MKM 	<ul style="list-style-type: none"> • EIS • DMOs • business representative organisations, • entrepreneurs 	In the 'My Local Authority' survey, residents' satisfaction with tourism has increased. A more specific target will be set following the results of the first measurement in 2026
31	Product development	We will continue to systematically analyse visitor satisfaction and translate identified bottlenecks into practical solutions that improve service quality and the user experience	<ul style="list-style-type: none"> • EIS • DMOs 		Satisfaction with tourism services in Estonia among international visitors is growing; 73% of international tourists staying overnight recommend visiting Estonia to their friends (EIS, international visitor border survey; the baseline for 2023–2024 is 73%)
32	Product development, connectivity	We will continue to support the preservation of Tartu's flight connections through the state budget	<ul style="list-style-type: none"> • MKM 		The proportion of overnight stays outside Tallinn in 2029 will be 53% (the baseline in 2023 was 52%)

2.4. Strategic Pillar No. 4:

Tourism is a stable and profitable business sector and a reputable career opportunity with good working conditions for employees

To ensure that tourism is a stable and profitable business sector and a prestigious career opportunity for employees with good working conditions, it is necessary, among other things, to develop tourism cooperation models and networks, improve working conditions in the labour market, increase the attractiveness of employers, and develop tourism education and skills.⁹

The focus is on improving tourism education, streamlining and simplifying tourism regulations, and tackling the shadow economy, so that by 2029, added value will increase to €34,920 per person employed.



As a result of the actions in the action plan, the added value of tourism enterprises per employed person will increase. As will the net profitability of tourism enterprises, investment in fixed assets (averaged over the last three years), the ratio of the average wage in the tourism sector to the Estonian average wage, the proportion of employed people aged 20–34 with a specialised and vocational education (one year after graduation and five years after graduation), and the number of tourism-related research publications:

Key indicators	Explanation	Long-term baseline 2023	Target level 2029	Long-term target 2035
Average value added per person employed in accommodation, food services, and travel agencies (Statistics Estonia)	Indicates the productivity of enterprises and labour productivity	€21,839 per employed person	€34,920 per employed person	€48,000 per employed person

⁹The Long-Term Outlook for Estonian Tourism 2025–2035, Annex 1, pp. 20–21.

Activities supporting the outputs of the fourth pillar:

Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
33 Business environment	We will modernise regulations on short-term rental services and improve market efficiency	• MKM	• KLIM	To address the bottlenecks identified in the study 'The Short-Term Rental Market in Estonia,' the definition of accommodation services has been clarified in the Tourism Act and the requirements for providing the service have been updated (draft to be finalised in 2026); an overview of the market is available, KLIM has the necessary input for shaping housing policy, and decisions have been made regarding whether or not to join the registration requirement set out in the EU Short-Term Rental Services Regulation
34 Business environment	We will continue to reduce the administrative burden and regulatory requirements in the tourism sector. To this end, we will review the requirements of the Tourism Act and reduce their scope and the need for supervision	• MKM		Requirements that are no longer necessary today — those concerning tourist information centres and the regulation of tour guides — have been removed from the Tourism Act, with the aim of reducing regulation in legislation and also supervision
35 Business environment	To reduce the shadow economy in the tourism sector: — we will compile regular reviews of the platform economy (short-term rental services provided via accommodation platforms) and publish them in statistical form — we will monitor tax losses in the tourism sector and carry out inspections to increase tax revenue, including paying particular attention to seasonal workers and more active tourism regions — we will prevent and draw attention to the failure to declare platform income	• ETCB		Data is available on tax revenue in the tourism sector (including platforms) and the shadow economy. Regular monitoring of the shadow economy in the tourism sector is carried out in key areas (concealment of turnover, envelope wages, concealment of platform income). As a result of control activities and effective e-services, tax revenue has increased and business transparency has improved. To reduce labour tax evasion, campaigns against undeclared wages (mainly targeting young people and seasonal workers) have been carried out, along with on-site inspections and checks of registers. To improve the reporting of short-term rental income, various measures aimed at prevention and the voluntary correction of unreported data have been implemented (including letters of notice, notifications, reminders, guidelines, messages to companies regarding tax compliance assessments, etc.)

Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
36 Business environment	We will agree with the parties involved on whether and how to promote the wider implementation of work-based learning in the tourism sector, by strengthening cooperation between employers and educational institutions and adapting curricula to meet the needs of the labour market	<ul style="list-style-type: none"> • MKM 	<ul style="list-style-type: none"> • Business representative organisations 	An agreement has been reached between the parties (including educational institutions) on promoting work-based learning in the tourism sector, and its implementation has begun
37 Business environment, entrepreneurshipettevõtlus	We are developing and implementing measures to increase the attractiveness of employers in the tourism sector, to establish stable and long-term employment relationships, and to bring working conditions into line with employees' expectations	<ul style="list-style-type: none"> • businesses, • business representative organisations 	<ul style="list-style-type: none"> • MKM supports the shaping of the business environment through sector-specific regulations 	The average gross monthly wage in accommodation and food services, compared to the Estonian average wage, will rise from 64% in 2023 to 67% in 2029
38 Business environment	We will continue to monitor the current situation and development trends in tourism education and organise a tourism education roundtable at least twice a year to develop tourism education	<ul style="list-style-type: none"> • MKM • Chamber of Commerce 		The current state and development trends of tourism education have been monitored, possible solutions discussed at the tourism education roundtable, and appropriate policy measures formulated where necessary. A study on the labour and skills needs of the tourism sector has been carried out
39 Business environment	We promote research and development in the tourism sector and raise its profile through monitoring, targeted guidance, and recognition: we are developing an indicator to assess the volume of tourism-related research; we are organising a competition for tourism-themed research; we regularly monitor theses and research articles; in collaboration with the sector, we provide topic suggestions for students' research projects	<ul style="list-style-type: none"> • MKM 		At least three bachelor's, master's and doctoral theses in the field of tourism are recognised annually in the national competition for student research

40 Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
Business environment	We map the current strengths and weaknesses of cooperation between businesses and educational institutions and develop a systematic cooperation framework that supports the integration of employer input into education, fosters entrepreneurship, and ensures the next generation of the workforce across the entire tourism sector – and on the basis of which to guide practical cooperation in the development of tourism education	<ul style="list-style-type: none"> • MKM 		A framework for systematic cooperation has been drawn up and is being implemented
41 Business environment	We will identify what opportunities are needed for acquiring tourism education or undertaking work placements at an international level, and who can do what to ensure these opportunities arise and that young people in Estonia have access to top-level education	<ul style="list-style-type: none"> • MKM 	<ul style="list-style-type: none"> • Business representative organisations 	An analysis of international tourism education and internship opportunities has been completed (2026), and collaborative pilot projects have been launched based on this, involving at least five Estonian educational institutions
42 Business environment	We will incorporate the requirements arising from the amendments to the EU Package Travel Directive into the Tourism Act and enhance the guarantee scheme for travel operators	<ul style="list-style-type: none"> • MKM 	<ul style="list-style-type: none"> • JDM 	The requirements for the protection of package travellers established in the Directive amending the EU Package Travel Directive (under consideration in the EU in 2025) have been transposed into the Tourism Act. The proposals for improving the guarantee scheme presented in the guarantee study (2024) (including the creation of a so-called 'second line of defence' or reserve to better protect travellers, and the updating of minimum guarantee rates) have been analysed, and possible solutions have been discussed with the parties involved

Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
43 Business environment	We will continue to simplify reporting for tourism businesses by encouraging the adoption of data-based reporting solutions, with the aim of ensuring resource savings for all parties and reducing the administrative burden on businesses. Developing real-time data capabilities for accommodation statistics and travel operator reporting	<ul style="list-style-type: none"> • MKM 	<ul style="list-style-type: none"> • CPTRA, • Statistics Estonia, • PBGB 	The accommodation taxonomy has been implemented and, where necessary, further developed; this includes businesses having the capability to transmit data to both Statistics Estonia and the PBGB using real-time economy solutions, whilst Statistics Estonia's capacity for data processing and faster publication has also increased. New data-driven reporting options in the tourism sector (e.g. travel operators) have been analysed. The state has encouraged the development of data-driven reporting. The same data is requested from businesses only once
44 Business environment	In cooperation with stakeholders, we are developing a solution to improve the accuracy of travel purpose data collected by accommodation establishments, so that the share of business tourism is reflected more reliably in tourism statistics	<ul style="list-style-type: none"> • MKM 	<ul style="list-style-type: none"> • EIS • Statistics Estonia 	Differences identified in the comparative analysis regarding the accounting treatment of business travel before and after the change
45 Business environment	We are developing and digitising the CPTRA's supervisory services	<ul style="list-style-type: none"> • CPTRA 		Smart supervisory tools have been developed for the CPTRA to supervise travel operators (checks on the adequacy of guarantees, preparation of risk forecasts, etc.). The CPTRA's capacity to carry out financial checks has been enhanced, including an analysis of the possibility of outsourcing guarantee adequacy checks to third parties and introducing automated checks of annual accounts. An automated query regarding the travel operator's tax debt was made to the ETCB. Regular meetings with major tour operators to discuss current issues have taken place

Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
46 Business environment	We are developing MTR (Tarvik) services to enhance user convenience for both travel operators and travellers, as well as to make CPTRA services more efficient	<ul style="list-style-type: none"> • CPTRA 		Submitting a travel operator's business activity reports, making enquiries and obtaining statistics from the register on the new platform (Tarvik) is convenient and simple. Submitting reports and guarantee documents to the CPTRA is convenient and simple for the operator, and for the sake of efficiency, this is done exclusively electronically. In addition, Tarvik's functionality is being enhanced to enable claims submitted by travellers in the event of a travel operator's insolvency to be received and processed within a single electronic environment. The CPTRA website features a tool for calculating guarantees for travel operators, along with guidelines for clarifying and fulfilling claims
47 Business environment	We raise awareness among businesses and consumers of their rights and obligations, and advise businesses on compliance	<ul style="list-style-type: none"> • Ministries, • CPTRA 	<ul style="list-style-type: none"> • EIS 	Updating guidelines/manuals for businesses. Articles and newsletters, training sessions (e.g. CPTRA's <i>Suuna-näitaja</i>). Information on key regulations affecting the tourism sector (including the Accessibility, Green Claims and Consumer Empowerment Directives) has been provided to tourism businesses insofar as they are relevant. Awareness-raising activities targeting travellers/consumers (including guidelines on how to act in the event of a travel operator's insolvency on the CPTRA website)

2.5. Strategic Pillar No. 5: A smart, innovative, and sustainable tourism sector

To support the smart, innovative, and sustainable development of Estonia's tourism sector, we are focusing on developing data and digital capabilities, reducing the environmental footprint, and integrating sustainability into public sector processes. We raise awareness of sustainability through training and green programmes, support the integration of these principles into everyday activities, recognise sustainable businesses and create opportunities for sharing experiences, whilst contributing to the achievement of the UN Sustainable Development Goals:



The focus is on supporting innovation, digitalization, and automation in the tourism sector, improving data accessibility and addressing food supply chain issues, with the aim of increasing productivity and digital capabilities and boosting investment in intangible assets



As a result of these activities, the share of services bookable online is expected to grow, and investment by accommodation, food services, and travel agencies in long-term intangible assets (e.g. software, licences and trademarks) is expected to increase:

Key indicators	Explanation	Long-term baseline 2023	Target level 2029	Long-term target 2035
Proportion of services bookable online in real time in the VisitEstonia database (EIS)	Indicates the digital capability of tourism businesses. Indicator updated in 2025.	37% (in 2025)	65	75%
Carbon footprint of the Estonian tourism sector (European Travel Commission – ETC)	The European Travel Commission is working to establish a method for measuring the carbon footprint of the tourism sector, using uniform criteria so that results between countries are comparable. Estonia is joining the European Travel Commission's initiative	To be confirmed	To be determined	To be confirmed
Investments in intangible fixed assets, average over the last five years (accommodation, food services and travel agencies combined) (Statistics Estonia)	Shows how much accommodation, food services and travel agencies invest in long-term intangible assets (e.g. software, licences and trademarks) to boost their competitiveness. At the time of finalising the Long-Term Outlook for Estonian Tourism, this indicator, 'Innovation cooperation with other sectors,' was not defined. Due to the lack of relevant data, this strategy focuses on investments in intangible fixed assets	€1.3 million	€1.9 million	€2.5 million

Activities supporting the outputs of the fifth pillar:

Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
48 Business environment	We support innovation in the tourism sector through the piloting of smart and AI-based solutions, cooperation with research and development institutions, and activities that support the implementation of new technologies and open data	• EIS	• MKM	At least four projects (one project per year) have been launched in cooperation with tourism research and development institutions, with the first project by the end of 2026
49 Product development	We will continue to digitise and automate work processes in the tourism sector – integrating, interfacing, and implementing software, enabling online booking of services, and raising awareness of digitisation through advisory and mentoring services	• EIS	• DMOs • businesses, • MKM	Proportion of services bookable online in real time in the VisitEstonia database: 65% (as of May 2025, the proportion of services bookable online in the VisitEstonia database was 37%)
50 Business environment	We will ensure the regular compilation of the tourism statistics satellite account by identifying a suitable funding and cooperation model	• MKM	• Statistics Estonia, • RAM, • EIS	From 2027, Statistics Estonia will publish the key indicators of the tourism satellite account annually (including the share of the tourism sector in the Estonian economy and employment, and data on the value added of tourism) with a shorter time lag compared to previous practice
51 Business environment	We are developing an Estonian tourism data space that aggregates and integrates data from the tourism ecosystem, including data on visitor movement patterns, to enable data-driven decision-making and innovation	• MKM	• Statistics Estonia, • EIS	The Estonian tourism data space has been established
52 Business environment	We are introducing AI-based analytics and forecasting models that enable better planning, resource allocation and marketing decision-making	• EIS	• MKM	AI-based analytics and forecasting models have been introduced for resource planning and marketing

53

Type of activity	Activity	Responsible parties	Co-implementer(s)	Output indicator (as at 31 December 2029, unless otherwise stated)
Product development	We are finding solutions to achieve a short/functional food supply chain	<ul style="list-style-type: none"> • REM 	<ul style="list-style-type: none"> • Businesses, • business representative organisations 	Cooperation to establish a short/functional food supply chain is underway. Support for the development of marketing opportunities for agricultural products and food through short supply chains or local markets for the period 2023–2027 has been implemented
54 Product development	We will continue to support businesses and destinations in applying for sustainability labels and joining environmental management programmes	<ul style="list-style-type: none"> • EIS • KLIM 	<ul style="list-style-type: none"> • DMOs, • Environmental Investment Centre, • Environmental Agency 	There are at least 100 tourism businesses in Estonia holding a sustainability label or implementing an environmental management system, and at least 15 destinations. By 2025, 111 businesses and 11 destinations.



3. Implementation of activities and monitoring of results

The MKM is responsible for implementing the action plan, and one of the main implementing bodies is the EIS. In addition, other government agencies, businesses, professional associations and other organisations will also carry out the activities.

The achievement of results is monitored by the Tourism Council, established under the MKM, under the leadership of the minister responsible for tourism. The Council includes representatives from the tourism sector and related fields. Their task is to monitor the implementation of the action plan and to respond quickly to changes where necessary.

To ensure the successful implementation of the action plan, cooperation operates on four levels:

1. A collaborative network within the tourism ecosystem comprising businesses, professional associations, transport operators, entry points to Estonia (airports, bus and railway stations, ports) and other key partners. At the heart of the tourism action plan is the tourism service provider who provides the service and for whose benefit and development the activities are carried out.

2. Destinations and DMOs – regional development organisations are guided by the visitor journey and lead the development of tourism in their region. The EIS acts as a nationwide DMO and coordinates the development and international marketing activities of the tourism ecosystem.

3. International cooperation – to implement the action plan, tourism-related cooperation is carried out with various countries, best practices are shared, and participation takes place in the work of various international organisations. For example, the MKM participates in the Baltic Tourism Committee, the tourism policy work of the European Union Strategy for the Baltic Sea Region (EUSBR), the work of the OECD Tourism Committee and, as required, in other international cooperation formats and projects; and the EIS participates in the working groups of the European Travel Commission, which brings together national tourism agencies across Europe.

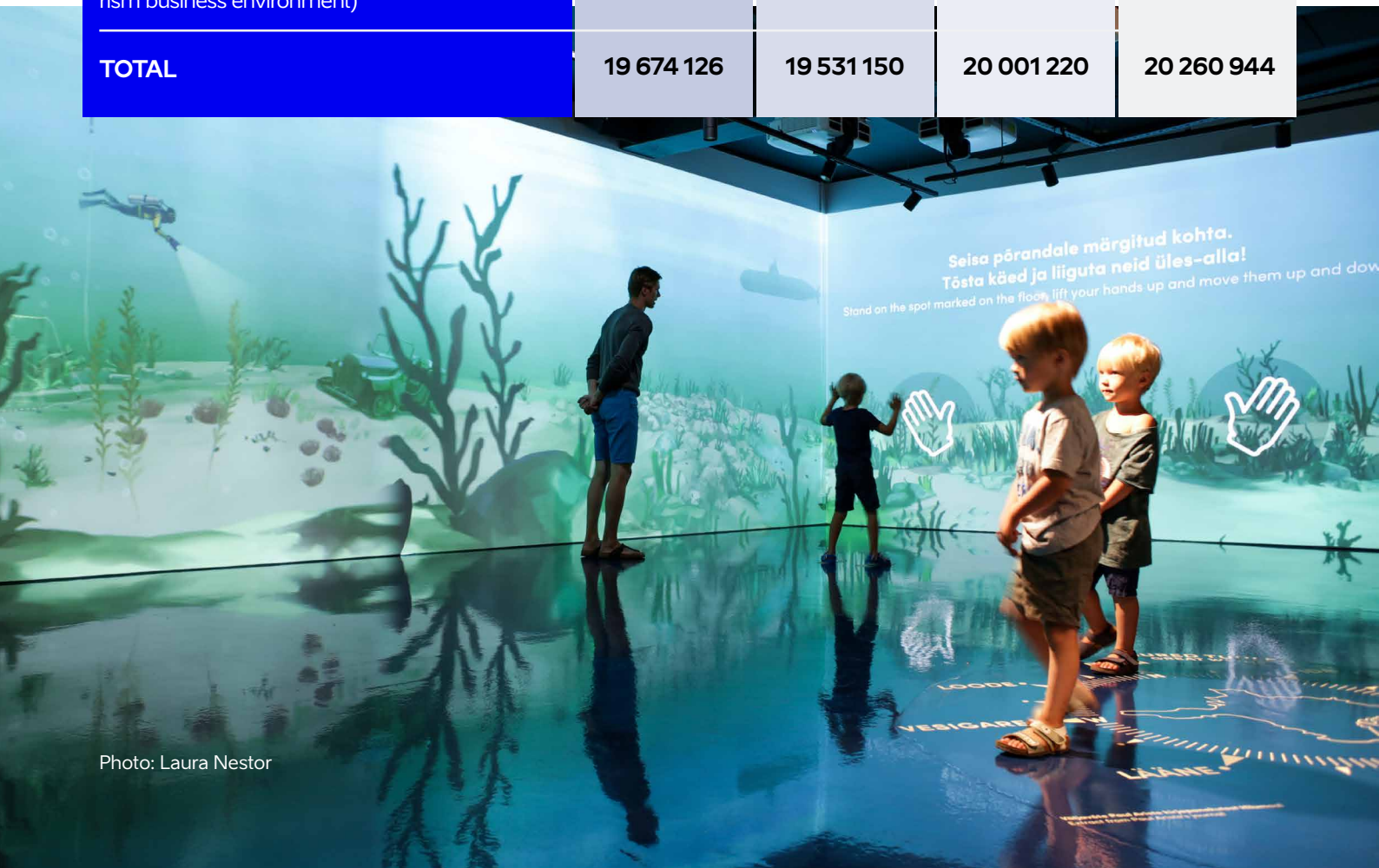
4. Domestic partners – The MKM coordinates cooperation with ministries and agencies involved in the tourism sector.

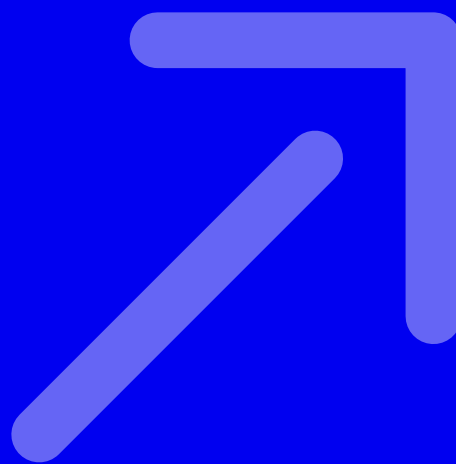
4. Budget forecast

No additional funds have been allocated in the MKM budget for the period covered by the action plan, i.e. the budget will not be increased (excluding the Route Development Fund). The implementation of activities also requires contributions from other ministries and tourism stakeholders, but the exact costs and potential funds are not known to the MKM. Activities falling within the MKM’s remit (including those of its subordinate agencies) are covered by both the state budget and EU structural funds.

Estimated breakdown of the amount the MKM will allocate during the action plan period to product development activities, marketing, and the development of connectivity and the business environment:

Type of activity	2026	2027	2028	2029
Support for product development (e.g. support for software integration, various activities to raise awareness and improve skills, e.g. on sustainability and digitalisation, data, research and analysis)	5 763 912	5 683 912	5 153 912	5 153 912
Marketing activities (e.g. support for international conferences, B2B and B2C marketing activities)	9 239 347	9 193 585	10 293 585	10 653 309
Development of transport links (Route Development Fund, tourism information system, Tartu flight connections)	2 410 000	2 374 000	2 274 000	2 174 000
Development of the business environment (targeted funding for DMOs and the ECB, activities by the EIS, MKM and CPTRA to develop the tourism business environment)	2 620 867	2 603 653	2 603 723	2 603 723
TOTAL	19 674 126	19 531 150	20 001 220	20 260 944





5. Involvement

The action plan was drawn up by the MKM, based on the Long-Term Outlook for Estonian Tourism and incorporating input from various institutions and organisations. Input and feedback on the working versions of the action plan were gathered through meetings, in writing, and via public consultation via the draft legislation information system¹⁰. Stakeholders involved: members of the Tourism Council, established under the Ministry of Economic Affairs and Communications; the Enterprise and Innovation Foundation; the Ministry of Regional Affairs and Agriculture; the Ministry of Culture; the Ministry of Climate; the Ministry of Foreign Affairs; the Ministry of the Interior; the Ministry of Justice and Digital Affairs; the Ministry of Education and Research; the Ministry of Finance; the Consumer Protection and Technical Regulatory Authority; the Police and Border Guard Board; the Tax and Customs Board; the State Forest Management Centre, Statistics Estonia, the Environmental Investment Centre, Tallinn Airport Ltd; Transport Administration; Government Office; destination management organisations (DMOs); Association of Estonian Cities and Municipalities; Estonian Association of Travel and Tourism Agencies; NGO County Development Centres; Estonian Hotel and Restaurant Association; Estonian Convention Bureau; NGO Estonian Rural Tourism; Estonian Spa Association; Estonian Nature Tourism Association; Estonian Chefs' Association; Estonian Sommeliers' Association; Estonian Guides' Association; Estonian Qualifications Authority; Estonian Major Attractions Association; Estonian Roundtable of Historic Buildings; Estonian Association of Small and Medium-Sized Enterprises; Estonian Chamber of Commerce and Industry; and the Tallinn Strategy Centre.

¹⁰Draft file number: 25-1045