Estonia’s awareness and image survey

Presentation
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The aim of the survey was to explore Estonia's reputation among its residents and in such EAS key countries as Finland, Sweden, Norway, Germany, the UK (Greater London), the Netherlands and Russia (St. Petersburg and Moscow).

The survey results will be used by EAS as an input for marketing and communication activity in foreign countries. The study is the first of its kind, with possible subsequent re-examinations.

- The study mapped the following areas:
  - **Familiarity** of countries (five countries: Estonia in comparison with Latvia, Lithuania, Finland, Denmark) and associating them with certain keywords.
  - **Reputation of countries** (five countries: Estonia in comparison with Latvia, Lithuania, Finland, Denmark) measured using certain attributes.
  - **Interest in and openness towards Estonia** - willingness to travel, to study, to work, to buy the goods of Estonian origin.
  - **e-Estonia and e-residency** familiarity and understanding;
  - **Spontaneous** and emotional associations with Estonia.
Survey methodology

- Survey target group in all countries (Finland, Sweden, Norway, Germany, the UK - Greater London, the Netherlands and Russia - St. Petersburg and Moscow) was:
  - age 18-75 years,
  - have travelled abroad at least once during last 12 months for a vacation or business purpose,
  - have visited at least three different foreign countries during past 10 years.

- Planned sample size in each country was 500 respondents, except for Russia, where planned sample size was 1000 respondents (500 in St. Petersburg and 500 in Moscow).

- As a research method web-interviews were used.

- As a sampling frame online panels of pre-recruited respondents were used for all the countries. Online panels are composed of people who made a conscious decision to participate in online surveys.

- In Estonia online panel owned by Kantar Emor was used. In other countries panels were provided by Lightspeed Research Ltd (owned by Kantar Group).
Sample and share of target group
Has been abroad on holiday or for business within the last 12 months and has visited at least 3 countries during the last 10 years

<table>
<thead>
<tr>
<th>Share of target group</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia 503</td>
<td>54%</td>
</tr>
<tr>
<td>Finland 520</td>
<td>40%</td>
</tr>
<tr>
<td>Germany 511</td>
<td>42%</td>
</tr>
<tr>
<td>GL 520</td>
<td>44%</td>
</tr>
<tr>
<td>NL 520</td>
<td>31%</td>
</tr>
<tr>
<td>Norway 521</td>
<td>49%</td>
</tr>
<tr>
<td>Russia 1028</td>
<td>42%</td>
</tr>
<tr>
<td>Sweden 520</td>
<td>28%</td>
</tr>
</tbody>
</table>
### Familiarity with countries

To what extent are you acquainted with the following countries?

- I have visited the country or lived in the country on a temporary basis
- I have read or heard a bit about the country

<table>
<thead>
<tr>
<th>Country</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>90</td>
<td>80</td>
<td>88</td>
<td>88</td>
<td>40</td>
</tr>
<tr>
<td>Latvia</td>
<td>87</td>
<td>45</td>
<td>26</td>
<td>12</td>
<td>64</td>
</tr>
<tr>
<td>Lithuania</td>
<td>9</td>
<td>57</td>
<td>7</td>
<td>57</td>
<td>42</td>
</tr>
<tr>
<td>Greater London</td>
<td>12</td>
<td>8</td>
<td>7</td>
<td>42</td>
<td>31</td>
</tr>
<tr>
<td>Netherlands</td>
<td>5</td>
<td>45</td>
<td>5</td>
<td>21</td>
<td>33</td>
</tr>
<tr>
<td>Norway</td>
<td>22</td>
<td>47</td>
<td>47</td>
<td>73</td>
<td>66</td>
</tr>
<tr>
<td>Russia</td>
<td>54</td>
<td>40</td>
<td>41</td>
<td>19</td>
<td>82</td>
</tr>
<tr>
<td>Sweden</td>
<td>34</td>
<td>57</td>
<td>67</td>
<td>30</td>
<td>86</td>
</tr>
</tbody>
</table>

*Read: 9% of German residents have visited Estonia or have lived here temporarily and 57% have heard or read about Estonia*
How old is Estonia as a country? (spontaneous)
Estonia will be celebrating its birthday in 2018. Do you know how old the Republic of Estonia will be?
% of those respondents, who have at least read or heard a bit about Estonia

- Estonia: 94%
- Finland: 23%
- Germany: 7%
- United Kingdom: 6%
- France: 8%
- Russia: 11%
- Norway: 18%
- Sweden: 4%
Country with the **cleanest air and environment** in the world (spontaneous answers)

Thinking about the countries you know of, which comes to your mind first as the country with the cleanest air and environment in the world?

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>16%</td>
</tr>
<tr>
<td>Finland</td>
<td>52%</td>
</tr>
<tr>
<td>Germany</td>
<td>15%</td>
</tr>
<tr>
<td>Greater London</td>
<td>15%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>17%</td>
</tr>
<tr>
<td>Norway</td>
<td>50%</td>
</tr>
<tr>
<td>Russia</td>
<td>12%</td>
</tr>
<tr>
<td>Sweden</td>
<td>27%</td>
</tr>
</tbody>
</table>

16% of German residents think that Norway is the country with the cleanest air and environment and 1% of them think that it is Estonia.
Country associated with the concept of a ‘digital society’ (spontaneous answers)
Thinking about the countries you know of, which would you associate first with the concept of a ‘digital society’?

<table>
<thead>
<tr>
<th>Country</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>53%</td>
</tr>
<tr>
<td>Greater London</td>
<td>25%</td>
</tr>
<tr>
<td>Finland</td>
<td>37%</td>
</tr>
<tr>
<td>Germany</td>
<td>26%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>23%</td>
</tr>
<tr>
<td>Norway</td>
<td>39%</td>
</tr>
<tr>
<td>Russia</td>
<td>21%</td>
</tr>
<tr>
<td>Sweden</td>
<td>46%</td>
</tr>
</tbody>
</table>

Read: 26% of German residents think that it is USA and 2% of them think that it is Estonia.
Country associated with the concept of an ‘e-Country’ (spontaneous)
Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

<table>
<thead>
<tr>
<th>Country</th>
<th>1st Place</th>
<th>2nd Place</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>83%</td>
<td>5%</td>
</tr>
<tr>
<td>Greater London</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Finland</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Germany</td>
<td>20%</td>
<td>8%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>31%</td>
<td>11%</td>
</tr>
<tr>
<td>Norway</td>
<td>29%</td>
<td>8%</td>
</tr>
<tr>
<td>Russia</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>Sweden</td>
<td>42%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Read: 31% of Finnish residents think that Finland is an e-country and 19% of them think that it is Estonia
Awareness and meaning of e-Estonia

Have you heard or seen the word ‘e-Estonia’ before?

- Yes: 76%
- No: 24%

What does the word ‘e-Estonia’ represent and mean in your opinion? (spontaneous)

- e-government, Internet country, e-services: 45%
- Digital conduct, IT solutions: 33%
- Digital development: 18%
- Innovative: 6%
- e-Residency: 3%
- Website for introducing and promoting Estonia: 2%
- Other: 8%
- Do not know: 2%
### Awareness and meaning of e-Estonia

% of those respondents, who have at least read or heard a bit about Estonia

<table>
<thead>
<tr>
<th>Has heard or seen the word 'e-Estonia'</th>
<th>Greater London</th>
<th>Finland</th>
<th>Germany</th>
<th>Netherlands</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>27%</td>
<td>32%</td>
<td>36%</td>
<td>31%</td>
<td>20%</td>
<td>20%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Things related with the Internet</th>
<th>12%</th>
<th>10%</th>
<th>10%</th>
<th>6%</th>
<th>1%</th>
<th>4%</th>
<th>9%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modern and innovative</td>
<td>10%</td>
<td>12%</td>
<td>10%</td>
<td>6%</td>
<td>8%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>E-Residency/e-nationality</td>
<td>7%</td>
<td>12%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-government</td>
<td>5%</td>
<td>40%</td>
<td>15%</td>
<td>6%</td>
<td>9%</td>
<td>35%</td>
<td>4%</td>
</tr>
<tr>
<td>Estonia</td>
<td>4%</td>
<td>10%</td>
<td>20%</td>
<td>17%</td>
<td>7%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>MS Estonia Ship</td>
<td>1%</td>
<td>20%</td>
<td>15%</td>
<td>21%</td>
<td></td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>44%</td>
<td>8%</td>
<td>15%</td>
<td>23%</td>
<td>10%</td>
<td>35%</td>
<td>13%</td>
</tr>
<tr>
<td>Do not know</td>
<td>24%</td>
<td>12%</td>
<td>18%</td>
<td>24%</td>
<td>35%</td>
<td>9%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Awareness and meaning of ‘e-Residency’

Have you heard or seen the word “e-Residency’ before?

- Yes: 76%
- No: 24%

What does the word “e-Residency’ represent and mean in your opinion? (spontaneous)

- e-Residency for foreigners to do business in Estonia: 47%
- e-Residency as a virtual citizen, similar rights: 42%
- Digital conduct/e-government: 7%
- Other: 7%
- Do not know: 1%
Openness to become an e-Resident
% of those respondents, who have at least read or heard a bit about Estonia

Has heard or seen the word 'e-Residency':
- 22%
- 17%
- 10%
- 19%
- 11%
- 16%
- 10%

Would certainly consider it:
- Greater London: 42%
- Finland: 27%
- Germany: 27%
- Netherlands: 27%
- Norway: 19%
- Russia: 15%
- Sweden: 10%

Would probably consider it:
- Greater London: 23%
- Finland: 43%
- Germany: 43%
- Netherlands: 27%
- Norway: 19%
- Russia: 39%
- Sweden: 22%

Would probably not consider it:
- Greater London: 0%
- Finland: 14%
- Germany: 0%
- Netherlands: 14%
- Norway: 0%
- Russia: 0%
- Sweden: 0%

Would certainly not consider it:
- Greater London: 14%
- Finland: 43%
- Germany: 10%
- Netherlands: 23%
- Norway: 0%
- Russia: 0%
- Sweden: 0%

Don’t know:
- Greater London: 7%
- Finland: 14%
- Germany: 0%
- Netherlands: 0%
- Norway: 0%
- Russia: 0%
- Sweden: 0%
### Estonia’s reputation profile

Please assess the general impression Estonia has left with you. How characteristic are these features of the following country?

% of those respondents, who have at least read or heard a bit about Estonia

<table>
<thead>
<tr>
<th>Feature</th>
<th>Estonia</th>
<th>Greater London</th>
<th>Finland</th>
<th>Sweden</th>
<th>Norway</th>
<th>Germany</th>
<th>Netherlands</th>
<th>Russia</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Nordic country</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordable to visit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An Eastern European country</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clean natural and living environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Innovative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcoming</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**average assessments on a 4-point scale**

1 - Strongly disagree, 2 - Disagree, 3 - Agree, 4 - Strongly agree.
Estonia’s reputation profile
Please assess the general impression Estonia has left with you. How characteristic are these features of the following country?

% of those respondents, who have at least read or heard a bit about Estonia

% of „very characteristic“

- A Nordic country
- Able to offer top-quality products and services
- Affordable to visit
- An Eastern European country
- Clean natural and living environment
- Clean, high-quality food
- Innovative
- Safe
- Simple administrative procedures
- Welcoming
- Visionary/pioneer

Estonia
Greater London
Finland
Sweden
Norway
Germany
Netherlands
Russia
<table>
<thead>
<tr>
<th>Keyword</th>
<th>Great. London</th>
<th>Finland</th>
<th>Germany</th>
<th>Netherlands</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendly, hospitable</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Beautiful, clean</td>
<td>16%</td>
<td>18%</td>
<td>10%</td>
<td>12%</td>
<td>8%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Innovation, development</td>
<td>16%</td>
<td></td>
<td>9%</td>
<td>10%</td>
<td>4%</td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Culture</td>
<td>12%</td>
<td>5%</td>
<td>9%</td>
<td>10%</td>
<td>5%</td>
<td></td>
<td>7%</td>
</tr>
<tr>
<td>Independent, free</td>
<td>12%</td>
<td>20%</td>
<td>15%</td>
<td>8%</td>
<td>8%</td>
<td></td>
<td>7%</td>
</tr>
<tr>
<td>Baltic country</td>
<td>11%</td>
<td>2%</td>
<td>17%</td>
<td>9%</td>
<td>11%</td>
<td></td>
<td>8%</td>
</tr>
<tr>
<td>Eastern-Europe</td>
<td>11%</td>
<td>3%</td>
<td>9%</td>
<td>12%</td>
<td>13%</td>
<td></td>
<td>9%</td>
</tr>
<tr>
<td>Nature</td>
<td>10%</td>
<td>3%</td>
<td>25%</td>
<td>19%</td>
<td>10%</td>
<td></td>
<td>9%</td>
</tr>
<tr>
<td>Energetic, entrepreneurial</td>
<td>9%</td>
<td>27%</td>
<td>8%</td>
<td>5%</td>
<td>4%</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>Russia/USSR/communism</td>
<td>9%</td>
<td>6%</td>
<td>20%</td>
<td>14%</td>
<td>4%</td>
<td></td>
<td>16%</td>
</tr>
<tr>
<td>Calm, stable, safe</td>
<td>8%</td>
<td>5%</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td></td>
<td>3%</td>
</tr>
<tr>
<td>Cold, grey, windy</td>
<td>8%</td>
<td>1%</td>
<td>8%</td>
<td>14%</td>
<td>5%</td>
<td></td>
<td>7%</td>
</tr>
<tr>
<td>European/EU country</td>
<td>7%</td>
<td>1%</td>
<td>8%</td>
<td>7%</td>
<td>3%</td>
<td></td>
<td>3%</td>
</tr>
<tr>
<td>Vacation, spa, tourism</td>
<td>6%</td>
<td>7%</td>
<td>1%</td>
<td>2%</td>
<td>9%</td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Cheap</td>
<td>4%</td>
<td></td>
<td></td>
<td>5%</td>
<td></td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Small</td>
<td>4%</td>
<td>9%</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Nordic country</td>
<td>3%</td>
<td>9%</td>
<td>1%</td>
<td>4%</td>
<td>4%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Poor</td>
<td>3%</td>
<td>1%</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Tallinn</td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
<td>3%</td>
<td>5%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Alcohol</td>
<td>2%</td>
<td>7%</td>
<td>2%</td>
<td>4%</td>
<td>4%</td>
<td></td>
<td>3%</td>
</tr>
</tbody>
</table>

Keywords, which are most associated with Estonia as a country (spontaneous)
% of those respondents, who have at least read or heard a bit about Estonia
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about Estonia

...go to Estonia (again) on holiday or travelling

...choose goods of Estonian origin, if possible

...buy cultural materials of Estonian origin (music, applied art, etc)

...conduct business cooperation with Estonian companies

...start your own business in Estonia as an entrepreneur (in the future)

...go to study in Estonia (again)

...go to work in Estonia (again)

average assessments on a 4-point scale

1                                 2                                 3                                   4

Greater London
Finland
Germany
Netherlands
Norway
Russia
Sweden
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about Estonia

...go to Estonia (again) on holiday or travelling
...choose goods of Estonian origin, if possible
...buy cultural materials of Estonian origin (music, applied art, etc)
...conduct business cooperation with Estonian companies
...start your own business in Estonia as an entrepreneur (in the future)
...go to study in Estonia (again)
...go to work in Estonia (again)
Emotional perception of Estonia – how would people like to feel in Estonia?
It is often difficult for people to talk about their emotions, especially when asked directly. A universal psychological model helps us understand deeper motives for human behaviour. This is used to segment people according to their emotional needs into dimensions extraversion-introversion and individualism-collectivism (C.G. Jung). Understanding this provides input for creating the correct approach and communication – which emotions, arguments, symbols, slogans, etc. to use in order to create a strong emotional connection with one’s target group.

In order to measure emotions in the given survey, we used Kantar TNS Group’s methodology for mapping emotional needs - NeedScope™ (simplified model). This measured, with the help of validated projective technique and images, the emotions people from different countries feel in association to Estonia – how people would like to feel when in Estonia, what emotions they associate Estonia with?
Emotional perception of Estonia – how would people like to feel in Estonia?

% of those respondents, who at least read or heard a bit about Estonia

- Ease
- Enjoyment
- Cheerfulness
- Friendliness
- Helpfulness
- Warmth
- Care
- Naturalness
- Safety
- Determination
- Competence
- Order
- Power
- Recognition
- Confidence
- Freedom
- Vitality
- Differentiation
- Convenience
- Ease
- Enjoyment
- Cheerfulness
- Friendliness
- Helpfulness
- Warmth
- Care
- Naturalness
- Safety
- Determination
- Competence
- Order
- Power
- Recognition
- Confidence
- Freedom
- Vitality
- Differentiation

© Emor AS
Focused
Systemic
Aspiring
Persistent
Contemplative
BLUE: what kind of communication and marketing has an impact on them?

- Representative of the Blue segment values professionalism, which means clear and specific information presented about the products and services.

- Blue segment representatives are thorough planners and want to make their own decisions. It is important for them to master their choices and compile their own package, so-to-say. In any case, they must be under the impression that they make the decisions.

- Quality is important and they are prepared to pay the right price for it.

- The right style and tone of voice in communication and marketing. When communicating with the Blue segment, one needs to be:
  - smart and serious – show that you are contemplative and grown up;
  - less is more – no need for exaggeration and pretty words;
  - expert – show professionalism, skill and knowledge of details.

"Offer me professionalism and quality!"
BLUE: expression in different categories

The main core of the segment is stable (and corresponds to the description above) but may be expressed in different ways in different categories.

- Food – refined, food as art.
- Money – strategy and discipline, money is a serious thing.
- Education – high quality, in-depth studies.
- Telecommunications – the main thing is quality, delving into details and the opportunity to compile one’s own plan.
- Media – credible, investigative, presents different positions.
- Cars – accurate and thought through in detail in design as well as operation, driving as art.
- Fashion – timeless and high quality, discreet.
- Sports – concentration, being systemic and perfect execution.
- Interior – logically organised, in order, stylish.
BROWN

- Understanding
- Gentle
- Caring
- Peaceful
- Satisfied
BROWN: what kind of communication and marketing has an impact on them?

- Representatives of the Brown segment expect trustworthiness and feeling of security – knowledge that they are cared for at they can rely on the offerer.
- Complete solutions/package solutions that are clear and understandable are suitable for Brown segment representatives.
- They expect helpful service and good advice, which makes decision-making simpler.

- The right style and tone of voice in communication and marketing. When communicating with the Brown segment, one needs to be:
  - reasonable – heart and soul is put into making it;
  - honest and sincere – nothing should be left hidden, trust is primary;
  - evolution rather than revolution – natural development, not change for the sake of change.

“Support me!”
BROWN: expression in different categories

The main core of the segment is stable (and corresponds to the description above) but may be expressed in different ways in different categories.

- Food – natural, healthy, nutritious.
- Money – peace of mind, money gives the feeling of security.
- Education – guarantees a job, studying close to home.
- Telecommunication – complete and understandable package solution.
- Media – balanced, negativity is not dominant.
- Cars – safety and simplicity, careful driver.
- Fashion – reserved, simple, genuine.
- Sports – relaxation, restart for the body.
- Interior – close to nature, secure, peaceful.
THANK YOU!