Estonia’s awareness and image survey

Report
March-May 2017
## Contents

- Survey objectives and methodology 3
- Estonia 6
- Finland 20
- Germany 36
- Greater London 52
- The Netherlands 68
- Norway 84
- Russia (St.Petersburg and Moscow) 100
- Sweden 116
- Comparison of the results in 8 countries 132
- Emotional perception of Estonia – how would people like to feel in Estonia? 146
Survey objectives and methodology
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 to Latvia, Lithuania, Finland, Denmark) and associating them with certain keywords.
  - Reputation of countries (five countries: Estonia in comparison to 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 old,
  - 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 the planned sample size was 1000 respondents (500 in St. Petersburg and 500 in Moscow).
- The actual sample size and structure in each country is shown further in the report, at the beginning of respective country chapter.
- Web-interviews were used as the research method.
- Online panels of pre-recruited respondents were used as a sampling frame for all the countries. Online panels are composed of people who made a conscious decision to participate in online surveys.
- In Estonia, the online panel owned by Kantar Emor was used. In other countries the panels were provided by Lightspeed Research Ltd (owned by Kantar Group).
Survey results: Estonia
Respondents’ profile

Total number of respondents is 503

**GENDER**
- Male: 48%
- Female: 52%

**AGE**
- 18-34: 34%
- 35-49: 31%
- 50-75: 36%

**NATIONALITY**
- Estonian: 66%
- Other: 34%

**REGION**
- Tallinn: 41%
- North-, West-Estonia: 26%
- Tartu, South-Estonia: 20%
- Virumaa: 13%

**EDUCATION**
- Basic or secondary: 14%
- Vocational: 21%
- Higher: 65%

**STATUS**
- Self-employed: 14%
- Salaried employee: 62%
- On parental leave, housewife: 2%
- Unemployed or a person seeking work: 5%
- Retired: 9%
- Pupil or student: 6%

Have you been abroad on holiday or for business within the last 12 months?
- Yes: 54%
- No: 46%

How many foreign countries have you been to on holiday or for business within the last 10 years?
- 0: 8%
- 1: 9%
- 2: 12%
- 3: 10%
- 4: 9%
- 5: 10%
- 6: 8%
- 7: 5%
- 8: 4%
- 9: 4%
- 10: 5%
- More than 10: 16%
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?

- **Norway**: 16%
- **Estonia**: 13%
- **Finland**: 12%
- **Sweden**: 9%
- **Iceland**: 9%

Estonian people also mentioned Switzerland (8%), Austria (5%), Greece (3%), Croatia (3%), Portugal (3%), Italy (3%), Denmark (2%) and New Zealand (2%) for their clean air and environment. 22% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

Estonia 53%  Finland 9%
Sweden 7%  USA 5%
Germany 4%  Japan 4%

Estonian people also mentioned Singapore (3%) and UK (3%). 12% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized.
Country associated with the concept of an ‘e-Country’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

Estonia 83%  Finland 5%

8% of the respondents mentioned other countries, the most frequent ones being Sweden, Germany and Great Britain.

Interesting: Estonians mentioned Finland as an ‘e-Country’ four times more often compared to Russian respondents, whereas Russian respondents mentioned USA two times more frequently than Estonians.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Latvia: 90%
- Lithuania: 80%
- Finland: 88%
- Denmark: 40%

- I have visited the country or lived in the country on a temporary basis
- I have read or heard a bit about the country
- I only know the name of the country
- Never heard of this country before
Countries’ reputation profile
Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

<table>
<thead>
<tr>
<th>Feature</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean nature and living environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Innovative</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Clean, high-quality food</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Simple administrative procedures for both residents and businesses</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>
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</tr>
<tr>
<td>Safe</td>
<td></td>
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</tr>
<tr>
<td>A Nordic country</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcoming</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Affordable to visit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An Eastern European country</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Not at all characteristic | Average on a 4-point scale | Very characteristic
## Countries’ reputation profile

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean nature and living environment</td>
<td>1 55</td>
<td>2 20</td>
<td>1 16</td>
<td>1 53</td>
<td>1 28</td>
</tr>
<tr>
<td>Innovative</td>
<td></td>
<td>2 3</td>
<td>4 3</td>
<td>1 26</td>
<td>1 22</td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td>1 40</td>
<td>2 19</td>
<td>1 15</td>
<td>1 29</td>
<td>1 27</td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td>2 38</td>
<td>3 2</td>
<td>2 1</td>
<td>2 6</td>
<td>1 6</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>1 32</td>
<td>2 10</td>
<td>4 8</td>
<td>1 53</td>
<td>1 46</td>
</tr>
<tr>
<td>Safe</td>
<td>1 34</td>
<td>1 11</td>
<td>2 10</td>
<td>1 32</td>
<td>1 24</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>3 28</td>
<td>25 6</td>
<td>37 4</td>
<td>1 81</td>
<td>3 47</td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td>1 23</td>
<td>6 1</td>
<td>7 1</td>
<td>1 22</td>
<td>1 15</td>
</tr>
<tr>
<td>Welcoming</td>
<td>2 16</td>
<td>1 19</td>
<td>1 20</td>
<td>1 22</td>
<td>1 23</td>
</tr>
<tr>
<td>Affordable to visit</td>
<td>6 25</td>
<td>2 28</td>
<td>1 23</td>
<td>13 12</td>
<td>18 7</td>
</tr>
<tr>
<td>An Eastern European country</td>
<td>11 22</td>
<td>4 29</td>
<td>5 26</td>
<td>1 5</td>
<td>2 2</td>
</tr>
</tbody>
</table>
Keywords, which are most associated with Estonia as a country (spontaneous answers)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?

- Pure nature and living environment: 31%
- Home/family: 25%
- Calm, secure: 20%
- Innovative/development: 18%
- E-government/e-services/digitalization: 16%
- Small: 10%
- Freedom/republic/independence: 8%
- Good/hard-working/busy: 5%
- Other: 64%

64% of the responses could not be categorized but some of the most frequent mentions were poverty, political corruption, bureaucracy and persistency/hard-working.
How old is Estonia as a country? (spontaneous answers)

Estonia will be celebrating its birthday in 2018. Do you know how old the Republic of Estonia will be?

94% of the respondents knew, that Estonia will be celebrating its 100th birthday

4% of the respondents had no idea and 2% gave a wrong answer
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%

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### 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)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>e-Residency as a virtual citizen, similar rights</td>
<td>42%</td>
</tr>
<tr>
<td>e-Residency for foreigners to do business in Estonia</td>
<td>47%</td>
</tr>
<tr>
<td>Digital conduct/e-government</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
<tr>
<td>Do not know</td>
<td>1%</td>
</tr>
</tbody>
</table>
Estonian residents consider Norway to be the country with the cleanest air and environment in the world (16%), while Estonia (13%) and Finland (12%) placed second and third. Close competition on the leader board (where only 4% separates the 1st and the 3rd place) and the fact that 22% of the answers were not categorized due to being mentioned less than 10 times, show a very wide variation of answers in this topic. No specific country (or countries) has taken a big lead in front of others.

When talking about the concept of an ‘information society’, it is clear which country Estonians associate it with the most – Estonia itself was mentioned by over half of the respondents (53%), while the other mentions came far behind – Finland came second with only 9% and Sweden third with 7%.

There is no doubt that Estonia is an ‘e-Country’ in its residents’ eyes – when asked which country they associate the concept of an e-Country with the most, Estonia was mentioned by an astounding 83% and other countries did not even really stand a chance - Finland coming up second with only 5% and the rest were not mentioned enough to be categorized.

Estonians are the most acquainted with their closest neighbours Latvia (91%) and Finland (89%) and the least with Denmark (40%) (percentage shows the amount of people who have visited the country or lived there on a temporary basis). Estonians have visited Denmark over two times more than the Russian speaking population (49% vs. 21%).

Estonians were also asked about the reputation profile of the countries observed in this research (EST, LAT, LIT, FIN, DK) and it’s interesting to see that even though Estonians see their home country mostly as positive (clean environment, innovative, high-quality food), there are still Estonians who also see it as an Eastern-European country. What is even more interesting, is that Estonians also see it as a Nordic country at the same time, scoring not far behind Denmark in this case. Estonian residents consider innovation and simple administrative procedures to be the best features of Estonia, bettering every other country in these areas. When comparing Estonia to the other Baltic countries, respondents tend to put Estonia before them in case of every positive feature and on the same level or slightly behind the Scandinavian countries.
The most frequent keywords that came from the spontaneous answers were ‘pure nature and living environment’ (31%), ‘home country/family/Estonian language’ (25%) and ‘peaceful, secure’ (20%) which is of course a positive outcome. There were also negative answers, such as ‘corruption’, ‘poverty’, ‘bureaucracy’ etc. but due to fragmentation and low frequency, they were not mentioned enough to be categorized.

94% of the respondents knew that Estonia will be celebrating its 100th birthday. While looking at the socio-demographic segments, Estonians are 10% more aware than the Russian-speaking residents (97% vs. 87%). There is also a difference in awareness when looking at educational background (respondents with higher education are the most aware (96%) and people with secondary or vocational education the least (88%)), region (people residing in North and West Estonia are the most aware with 97% and people in Virumaa the least (90%)) and age (the older generation is the most aware with 97% and the younger generation the least with 90%).

Overall, 76% of Estonian residents have heard the word ‘e-Estonia’ before but exposure to the term varies between national groups – data shows that the Russian-speaking population has been exposed to and are aware of the term more than the Estonian-speaking one (85% vs 71%). While understanding the term is quite similar in both nationality groups and it is associated the most with e-government and e-services (45%), there are differences between different regions – the residents of Virumaa associate it with e-government the most (68%, in comparison only 40% in Tallinn) and have less fragmented answers than other regional groups. 2% of the respondents were unable to give an answer on the meaning of the term.

The same amount of respondents (76%) have heard the word ‘e-Residency’ before but in this case, the Estonian-speaking population is much more aware than the Russian-speaking one (89% vs 51%). In overall results, the term represents e-Residency as a way for foreigners to do business in Estonia (47%) and also e-Residency as a option to become a virtual citizen, where you do not have to be in the same country but can have similar rights to other citizens (42%). Comparing the answers in socio-demographic segments, there is a clear difference between how Estonian and Russian-speaking respondents see it – Estonians tend to think it represents the opportunity for foreigners to do business (54%), while Russian speakers think of it as more like a virtual citizenship to have similar rights (53%). 1% of the respondents could not give an answer on the meaning of the term.
Respondents’ profile
Total number of respondents is 520

<table>
<thead>
<tr>
<th>GENDER</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>male</td>
<td>50%</td>
</tr>
<tr>
<td>female</td>
<td>50%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>AGE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>29%</td>
</tr>
<tr>
<td>35-49</td>
<td>26%</td>
</tr>
<tr>
<td>50-75</td>
<td>45%</td>
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</table>

<table>
<thead>
<tr>
<th>REGION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>South- East Finland</td>
<td>52%</td>
</tr>
<tr>
<td>North-West Finland</td>
<td>48%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EDUCATION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>basic or secondary</td>
<td>16%</td>
</tr>
<tr>
<td>vocational</td>
<td>33%</td>
</tr>
<tr>
<td>higher</td>
<td>49%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STATUS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>self-employed</td>
<td>7%</td>
</tr>
<tr>
<td>salaried employee</td>
<td>46%</td>
</tr>
<tr>
<td>On parental leave, housewife</td>
<td>2%</td>
</tr>
<tr>
<td>unemployed or a person seeking work</td>
<td>9%</td>
</tr>
<tr>
<td>retired</td>
<td>22%</td>
</tr>
<tr>
<td>pupil or student</td>
<td>12%</td>
</tr>
</tbody>
</table>

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

FINLAND
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?

- Finland: 52%
- Norway: 13%
- Sweden: 8%
- Estonia: 1%
- Iceland: 8%

Finnish people also mentioned Switzerland (2%), New Zealand (2%), Austria (1%), Estonia (1%), Greenland (1%), Spain (1%), Croatia (1%), Ireland (1%), Italy (1%), Canada (1%), Greece (1%), Portugal (1%), Denmark (1%) and UK (1%). 5% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 5% of the respondents could not give an answer.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

Finnish people also associated USA (7%), Japan (6%), UK (3%), Netherlands (2%), Norway (2%), Denmark (2%), China (1%), Korea (1%), and Singapore (1%) with the concept of “information society”. 5% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 8% of the respondents could not give an answer.
Country associated with the concept of an ‘e-Country’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

Finnish people also associate the following countries with the concept of an ‘e-Country’: Japan (3%), Denmark (3%), China (1%), Netherlands (1%), Korea (1%), Norway (1%), France (1%), Singapore (1%) and UK (1%). 4% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 19% of the respondents could not give an answer.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Estonia
  - 12% I have visited the country or lived in the country on a temporary basis
  - 87% I have read or heard a bit about the country

- Latvia
  - 45% I have visited the country or lived in the country on a temporary basis
  - 38% I have read or heard a bit about the country

- Lithuania
  - 26% I have visited the country or lived in the country on a temporary basis
  - 50% I have read or heard a bit about the country

- Denmark
  - 31% I have visited the country or lived in the country on a temporary basis
  - 64% I have read or heard a bit about the country

- Finland

- Estonia
  - Never heard of this country before
  - This country is my permanent place of residence

- Latvia
  - Never heard of this country before

- Lithuania
  - Never heard of this country before

- Denmark
  - Never heard of this country before

- Finland
  - Never heard of this country before
Countries’ reputation profile I

Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

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

Not at all characteristic | average on a 4-point scale | Very characteristic
### Countries’ reputation profile II

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Feature</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable to visit</td>
<td>48</td>
<td>41</td>
<td>39</td>
<td>11</td>
</tr>
<tr>
<td>Welcoming</td>
<td>1</td>
<td>27</td>
<td>2</td>
<td>35</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>1</td>
<td>20</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Innovative</td>
<td>1</td>
<td>17</td>
<td>4</td>
<td>58</td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td>1</td>
<td>14</td>
<td>3</td>
<td>40</td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td>2</td>
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<tr>
<td>An Eastern European country</td>
<td>8</td>
<td>21</td>
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<td>2</td>
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<tr>
<td>Visionary/pioneer</td>
<td>4</td>
<td>15</td>
<td>9</td>
<td>26</td>
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<tr>
<td>Safe</td>
<td>4</td>
<td>9</td>
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<td>40</td>
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<tr>
<td>Clean nature and living environment</td>
<td>4</td>
<td>9</td>
<td>6</td>
<td>26</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>32</td>
<td>5</td>
<td>49</td>
<td>3</td>
</tr>
</tbody>
</table>

- **Not at all characteristic**
- **Very characteristic**
Keywords, which are most associated with Estonia as a country (spontaneous answers)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?

% of those respondents, who have at least read or heard a bit about the respective country

- Innovation, development: 30%
- Energetic, entrepreneurial: 27%
- Independent, free: 20%
- Friendly, hospitable: 18%
- Cheap: 16%
- Small: 9%
- Good food: 8%
- Alcohol: 7%
- Vacation, spa, tourism: 7%
- Unpleasant: 6%
- Relates with Russia/USSR/communism: 6%
- Culture: 5%
- Calm, stable, safe: 5%
- Tallinn: 5%
- Eastern-Europe: 3%
- Beautiful, clean: 3%
- Nature: 3%
- Baltic country: 2%
- Unsafe: 2%
- Other: 42%

42% of the responses were not categorized due to a wide variety but some of the most frequent mentions were “neighbor”, “little brother” and “close”.

FINLAND
How old is Estonia as a country? (spontaneous answers)

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 the respective country

23% of the respondents knew, that Estonia will be celebrating its 100th birthday

48% of the respondents had no idea and 29% gave a wrong answer
Awareness and meaning of e-Estonia

% of those respondents, who have at least read or heard a bit about the respective country

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

- Yes: 27%
- No

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

- E-government: 40%
- E-Residency/e-nationality: 12%
- Modern and innovative (technologically advanced): 12%
- Things related with the Internet: 10%
- Estonia: 4%
- MS Estonia Ship: 1%
- Other: 8%
- Do not know: 12%

© Emor AS
Awareness and meaning of ‘e-Residency’
% of those respondents, who have at least read or heard a bit about the respective country

Have you heard or seen the word “e-Residency’ before?
- No: 83%
- Yes: 17%

What does the word “e-Residency’ represent and mean in your opinion? (spontaneous answers)
- e-Residency (electronic residence permit): 45%
- e-Residency (doing business digitally): 18%
- Digital country: 2%
- Great Internet access (technologically advanced): 1%
- Other: 22%
- Do not know: 11%

How likely would you consider becoming an Estonian e-Resident?
- Would certainly consider it: 17%
- Would probably consider it: 2%
- Would probably not consider it: 1%
- Would certainly not consider it: 11%
- Do not know: 17%
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about the respective country

How would you assess your preparedness to...

...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

...go to work in Estonia (again)

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

...go to study in Estonia (again)

Not connected to entrepreneurial activities and not interested in this in any foreign country = 19%

Not connected to entrepreneurial activities and not interested in this in any foreign country = 24%

Low

Average on 4-point scale

High
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about the respective country

How would you assess your preparedness to...

...go to Estonia (again) on holiday or travelling
4 % Low
60 % High

...choose goods of Estonian origin, if possible
6 % Low
19 % High

...buy cultural materials of Estonian origin (music, applied art, etc)
9 % Low
16 % High

...conduct business cooperation with Estonian companies
15 % Low
20 % High

...go to work in Estonia (again)
33 % Low
6 % High

...start your own business in Estonia as an entrepreneur (in the future)
28 % Low
8 % High

...go to study in Estonia (again)
32 % Low
6 % High

Not connected to entrepreneurial activities and not interested in this in any foreign country = 19%

Not connected to entrepreneurial activities and not interested in this in any foreign country = 24%
Summary I

- It is visible that Finnish people love their land a lot and they consider Finland (52%) to be the country with the cleanest air and environment in the world. Estonia was mentioned by a relatively small number of people (1%) but the ones who mentioned it the most were men, aged 50-75.

- Once again, proving their good image in its residents’ eyes, Finland (37%) is associated the most with the concept of an ‘information society’ among Finnish people. Estonia (10%) ranked second together with Sweden (10%) and Germany (10%).

- The country associated the most with the concept of an ‘e-Country’ was also Finland (31%), Estonia (19%) placed second. Estonia was mentioned the least by women aged 18-24 (3%) and by people from rural areas (14%).

- Finnish people are very familiar with Estonia – being a close neighbour of Finland, it has been visited by 88% of Finnish people (Latvia by 45%, Lithuania by 26% and Denmark by 64%). Women in the age group of 18-24 are the ones who have visited Estonia the least.

- Not many Finnish people have heard the terms ‘e-Estonia’ (27%) or ‘e-Residency’ (17%). 40% of the people who had heard about ‘e-Estonia’, think it stands for e-Government. The ones who have heard about ‘e-Residency’ believe it stands for an electronic residence permit (45%) and doing business digitally (18%). Therefore, the ones who have heard about them, have quite a good knowledge about the meaning of the terms. Only 7% of the people who have heard about ‘e-Residency’ before would consider becoming an Estonian e-Resident. Men, aged 25-34, are the most open to becoming an e-Resident.

- While Latvia and Lithuania have quite similar reputation profiles, Estonia differs from them a lot and received better results in every aspect. Among the Baltic countries, Estonia is seen as much more innovative and visionary compared to the others. Generally, Denmark has the best reputation profile among the four countries and Estonia took the second place. The only indicator where Estonia is seen as better than Denmark is how affordable it is to visit the country. On the positive side, while comparing the two countries, Estonia also got good results in having simple administrative procedures and being welcoming. Denmark (26%) got an almost three times higher ranking than Estonia (9%) on the clean natural and living environment scale. Estonia (9%) is not seen as a very safe place, especially compared to Denmark (40%). But other Baltic countries are seen as even less safe than Estonia – Latvia (4%) and Lithuania (3%).
Talking about the reputation profiles of countries, Estonia is still seen more as an Eastern European than a Nordic country. While 32% find that Estonia cannot be characterized with the phrase ‘a Nordic country’ at all, 21% find the phrase ‘an Eastern European country’ very characteristic.

Many positive keywords were associated with Estonia as a country. The most popular ones were innovative (30%), entrepreneurial (27%) and independent (20%). Since it is known that one of the reasons for tourism from Finland to Estonia is associated with alcohol, many people associate the keyword ‘alcohol’ (7%) with Estonia.

23% of the respondents knew that Estonia will be celebrating its 100th birthday. Men were much more aware than women in this case. Especially young women in the age groups of 18-24 and 25-34 had very little knowledge on this topic.

Talking about openness and interest towards Estonia, Finnish people are rather open. They are more than fine with travelling to Estonia (60%). They are also positive about choosing goods and consuming culture of Estonian origin. On the other hand, interest towards studying and working in Estonia is rather low – one third of the respondents are not interested in it at all and only 6% showed strong willingness to come to work or study in Estonia.

Conducting business cooperation with Estonian companies is seen as more attractive (20%) than starting a business in Estonia as an entrepreneur (8%). It is good to keep in mind that quite a lot of people are rather sceptical about opening a business or conducting business cooperation in any foreign country, so the fault might not be only in Estonia itself in this case.

Young men aged 18 to 34 are the most open towards Estonia. The ones who are the most willing to travel and conduct business cooperation with Estonian companies are mostly men, aged 18-24. Men aged 25-34 are more open to working in Estonia and consider opening a business in Estonia the most.
Germany
Respondents’ profile

total number of respondents is 511

GENDER

- male: 50%
- female: 50%

AGE

- 18-34: 26%
- 35-49: 29%
- 50-75: 45%

REGION

- North: 17%
- South: 42%
- Centre: 21%
- East: 20%

EDUCATION

- basic or secondary: 48%
- vocational: 21%
- higher: 29%

STATUS

- self-employed: 9%
- salaried employee: 45%
- on parental leave, housewife: 5%
- unemployed or a person seeking work: 13%
- retired: 17%
- pupil or student: 9%

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

42%
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?

- **Norway**: 15%
- **Switzerland**: 10%
- **Austria**: 9%
- **Sweden**: 7%
- **Iceland**: 7%
- **Estonia**: 1%

German people also mentioned New Zealand (5%), Canada (5%), Denmark (4%), Australia (3%), Spain (3%), Finland (2%), Ireland (2%), Croatia (2%), Italy (2%), Netherlands (1%), Africa (1%), **Estonia (1%)**, Greenland (1%), Greece (1%), Thailand (1%), UK (1%) and USA (1%). 8% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 15% of the respondents could not give an answer.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

USA 26%
Germany 23%
Japan 5%
Sweden 3%
Estonia 2%

German people also associated UK (2%), China (2%), Italy (2%), Estonia (2%), Norway (2%), Netherlands (2%), Korea (2%), Denmark (1%), Finland (1%) and Singapore (1%) with the concept of an “information society”. 11% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 18% of the respondents could not give an answer.
Country associated with the concept of an ‘e-Country’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

German people also associate the following countries with the concept of an ‘e-Country’: Netherlands (2%), France (2%), Norway (2%), Finland (1%), Japan (1%), China (1%) and Singapore (1%). 12% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 35% of the respondents could not give an answer.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Estonia
- Latvia
- Lithuania
- Finland
- Denmark

- I have visited the country or lived in the country on a temporary basis
- I have read or heard a bit about the country
- I only know the name of the country
- Never heard of this country before
- This country is my permanent place of residence
Countries’ reputation profile I

Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

![Diagram showing the assessment of various characteristics of countries like Estonia, Latvia, Lithuania, Finland, and Denmark.](image-url)
## Countries’ reputation profile II

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Feature</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Eastern European country</td>
<td>5</td>
<td>4</td>
<td>5</td>
<td>41</td>
<td>58</td>
</tr>
<tr>
<td>Affordable to visit</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>11</td>
<td>58</td>
</tr>
<tr>
<td>Clean nature and living environment</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>11</td>
<td>58</td>
</tr>
<tr>
<td>Welcoming</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Simple administrative procedures for both residents and businesses</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Safe</td>
<td>3</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Innovative</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>8</td>
<td>6</td>
<td>9</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Not at all characteristic</th>
<th>% Very characteristic</th>
</tr>
</thead>
</table>

% Not at all characteristic % Very characteristic

GERMANY
Keywords, which are most associated with Estonia as a country (spontaneous answers)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?

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

- Nature: 25%
- Relates with Russia/USSR/communism: 20%
- Baltic country: 17%
- Friendly, hospitable: 16%
- Independent, free: 15%
- Innovation, development: 15%
- Baltic Sea: 11%
- Beautiful, clean: 10%
- Culture: 9%
- Eastern-Europe: 9%
- Nordic country: 9%
- European/EU country: 8%
- Cold, grey, windy: 8%
- Energetic, entrepreneurial: 8%
- Calm, stable, safe: 7%
- Small: 6%
- Tallinn: 6%
- Unpleasant: 4%
- Poor: 3%
- Good food: 3%
- Other: 42%

42% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers).
How old is Estonia as a country? (spontaneous answers)
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

7% of the respondents knew, that Estonia will be celebrating its 100th birthday

76% of the respondents had no idea and 17% gave a wrong answer
Awareness and meaning of e-Estonia
% of those respondents, who have at least read or heard a bit about Estonia

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

- Yes: 32%
- No

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

- MS Estonia Ship: 20%
- E-government: 15%
- Modern and innovative (technologically advanced): 10%
- Estonia: 10%
- Things related with the Internet: 10%
- Other: 16%
- Do not know: 18%

16% of the responses were not categorized due to a wide variety
Awareness and meaning of ‘e-Residency’

% of those respondents, who have at least read or heard a bit about the respective country

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

- Yes: 10%
- No: 90%

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

- e-Residency (electronic residence permit): 31%
- e-Residency (doing business digitally): 14%
- Digital country: 9%
- Great Internet access (technologically advanced): 6%
- Other: 23%
- Do not know: 17%

23% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)

How likely would you consider becoming an Estonian e-Resident?

- Would certainly consider it: 14%
- Would probably consider it: 10%
- Would probably not consider it: 9%
- Would certainly not consider it: 6%
- Do not know: 23%
- Other: 17%

GERMANY

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

How would you assess your preparedness to...

...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

...go to work in Estonia (again)

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

...go to study in Estonia (again)
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about Estonia

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Low</th>
<th>% High</th>
</tr>
</thead>
<tbody>
<tr>
<td>...go to Estonia (again) on holiday or travelling</td>
<td>4</td>
<td>30</td>
</tr>
<tr>
<td>...choose goods of Estonian origin, if possible</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td>...buy cultural materials of Estonian origin (music, applied art, etc)</td>
<td>8</td>
<td>17</td>
</tr>
<tr>
<td>...conduct business cooperation with Estonian companies</td>
<td>10</td>
<td>16</td>
</tr>
<tr>
<td>...go to work in Estonia (again)</td>
<td>46</td>
<td>7</td>
</tr>
<tr>
<td>...start your own business in Estonia as an entrepreneur (in the future)</td>
<td>29</td>
<td>7</td>
</tr>
<tr>
<td>...go to study in Estonia (again)</td>
<td>47</td>
<td>7</td>
</tr>
</tbody>
</table>
Summary I

- German people consider Norway (15%) to be the country with the cleanest air and environment in the world. Switzerland (10%) and Austria (9%) got the 2nd and 3rd place in the eyes of the respondents. Estonia was not very popular and was mentioned by only 1%.

- USA (26%) was named as the country most associated with the concept of an 'information society' but with this question German people did not forget about themselves and Germany was named by 23%. Other countries were mentioned a relatively small number of times since Japan follows them at quite a distance with only 5%. Estonia was pointed out by 2% of the respondents.

- The country most associated with the concept of an ‘e-Country’ was USA (20%), Germany followed with 8%. Estonia was ranked 4th with 4%. Estonia was named the most by men and more specifically by men between the ages of 25-34 and 35-49.

- In the comparison of five countries (EST, LAT, LIT, FIN, DK), Denmark was the most known. 42% of respondents have visited it, while Estonia has been visited by only 9%. The percentages between the Baltic countries differ only by 1-2%. Among the Baltics, Estonia has been visited the most but Lithuania has been heard about the most. On the other hand, Finland is known more than Estonia, but only 15% have visited the country.

- While collating the same five countries with each other, Denmark and Finland have the best reputation profiles. In case of many indicators, Estonia received only half of the rating compared to Finland and Denmark. For example in case of clean nature and living environment Finland received 69% for “very characteristic”, Denmark - 60% and Estonia - 31%. German people rated Denmark (64%) and Finland (62%) as three times safer than Estonia (21%). The only indicator where Estonia got a much better result than Denmark and Finland, was how affordable it is to visit. Although Estonia is generally seen as the most Nordic among the three Baltic countries, this time Latvia got a slightly better result. Also, Latvia is seen as safer (24%). In case of other indicators, Estonia obtained the best results in comparison to Latvia and Lithuania, even though the difference between the countries was not that significant.
Summary II

- German people associate Estonia with **nature** (25%) the most. They still associate Estonia with **Russia/USSR/communism** (20%) a lot and the third most popular **keyword** was **Baltic country** (17%). It is interesting, that Estonia is seen equally both an **Eastern European country** and a **Nordic country** in Germany – both keywords were mentioned by 9% of the respondents.

- Only 7% of the respondents knew that Estonia will be celebrating its **100th birthday**. 76% had no idea and 17% gave a wrong answer. The biggest percentage of respondents who have no idea how old Estonia is, was among young women aged 18-24 (89%).

- German people are **not very familiar** with the words ‘e-Estonia’ and ‘e-Residency’. Even though 32% of the respondents have heard or seen the word ‘e-Estonia’ before, the majority of them believe it means the **ship MS Estonia** (20%). Luckily the next most popular answer was **e-government** (15%). Talking about ‘e-Residency’, only 10% of the respondents had heard or seen the word before. 31% among them answered that it stands for **electronic residence permit** and 14% thought it stood for **doing business digitally**. Only 14% of the ones who had heard about ‘e-Residency’ would certainly consider becoming one.

- Looking at the results of **how open German people are towards Estonia**, it can be said that they are **rather open**. They marked their willingness as high (30%) rather than low (4%) when it comes to **going to Estonia on holiday or travelling**. Respondents’ preparedness to **choose goods of Estonian origin, buy cultural materials of Estonian origin and conduct business cooperation** was also rated high more than low. But when it comes to **going to work, starting their own business as an entrepreneur or going to study in Estonia**, German people responded that their willingness is **very low** and they are **not interested** in these fields.

- When talking about **who are the most open** towards Estonia, it turns out that **women** aged 25-34 are the most interested in choosing goods and buying cultural materials of Estonian origin. They are also the ones who are the most interested in going to study in Estonia and conducting business cooperation. They are very interested in going to Estonia on holiday but men in the same age group are even slightly more into it. In terms of willingness to start their own business in Estonia as an entrepreneur (in the future), men between the ages of 35-49 are the most open towards that.
Greater London
Respondents’ profile

Total number of respondents is 520

GENDER

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>50%</td>
</tr>
</tbody>
</table>

AGE

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>31%</td>
</tr>
<tr>
<td>35-49</td>
<td>29%</td>
</tr>
<tr>
<td>50-75</td>
<td>40%</td>
</tr>
</tbody>
</table>

EDUCATION

<table>
<thead>
<tr>
<th>Education</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic or secondary</td>
<td>16%</td>
</tr>
<tr>
<td>Vocational</td>
<td>13%</td>
</tr>
<tr>
<td>Higher</td>
<td>68%</td>
</tr>
</tbody>
</table>

STATUS

<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>15%</td>
</tr>
<tr>
<td>Salaried employee</td>
<td>55%</td>
</tr>
<tr>
<td>On parental leave, housewife</td>
<td>6%</td>
</tr>
<tr>
<td>Unemployed or a person seeking work</td>
<td>4%</td>
</tr>
<tr>
<td>Retired</td>
<td>14%</td>
</tr>
<tr>
<td>Pupil or student</td>
<td>5%</td>
</tr>
</tbody>
</table>

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: 44%
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>Mentioned by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>15%</td>
</tr>
<tr>
<td>Sweden</td>
<td>8%</td>
</tr>
<tr>
<td>Norway</td>
<td>7%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>7%</td>
</tr>
<tr>
<td>Iceland</td>
<td>6%</td>
</tr>
<tr>
<td>Canada</td>
<td>6%</td>
</tr>
<tr>
<td>Estonia</td>
<td>1%</td>
</tr>
</tbody>
</table>

People from London also mentioned Australia (3%), Spain (3%), UK (3%), Netherlands (2%), Ireland (2%), Japan (2%), Finland (2%), Denmark (2%), USA (2%), Africa (1%), Austria (1%), **Estonia (1%)**, Greenland (1%), Italy (1%), Greece (1%), Cyprus (1%) and Portugal (1%). 20% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 10% of the respondents could not give an answer.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

People from London also associated South-Korea (4%), Germany (3%), Singapore (3%), Sweden (2%), Estonia (1%), Netherlands (1%), Finland (1%), France (1%) and Denmark (1%) with the concept of an “information society”. 8% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 15% of the respondents could not give an answer.
Country associated with the concept of an ‘e-Country’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

People from London also associate the following countries with the concept of an ‘e-Country’: China (4%), Korea (3%), France (3%), Singapore (3%), Estonia (2%), Netherlands (2%), Sweden (2%), Denmark (2%), Norway (1%). 9% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 23% of the respondents could not give an answer.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Estonia
  - Visited the country or lived on a temporary basis: 11%
  - Read or heard a bit about the country: 46%
  - Only know the name of the country: 47%
  - Never heard of this country before: 12%

- Latvia
  - Visited the country or lived on a temporary basis: 10%
  - Read or heard a bit about the country: 45%
  - Only know the name of the country: 47%
  - Never heard of this country before: 11%

- Lithuania
  - Visited the country or lived on a temporary basis: 21%
  - Read or heard a bit about the country: 55%
  - Only know the name of the country: 51%
  - Never heard of this country before: 10%

- Finland
  - Visited the country or lived on a temporary basis: 21%
  - Read or heard a bit about the country: 55%
  - Only know the name of the country: 51%
  - Never heard of this country before: 21%

- Denmark
  - Visited the country or lived on a temporary basis: 31%
  - Read or heard a bit about the country: 51%
  - Only know the name of the country: 65%
  - Never heard of this country before: 21%

- This country is my permanent place of residence:
  - Estonia: 11%
  - Latvia: 10%
  - Lithuania: 21%
  - Finland: 21%
  - Denmark: 31%

- Never visited the country: 100%
Countries’ reputation profile I

Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

Not at all characteristic  average on a 4-point scale  Very characteristic

- Estonia
- Latvia
- Lithuania
- Finland
- Denmark

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

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th></th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Eastern European country</td>
<td>4 54</td>
<td>2 57</td>
<td>3 54</td>
<td>38 24</td>
<td>44 19</td>
</tr>
<tr>
<td>Affordable to visit</td>
<td>1 38</td>
<td>1 40</td>
<td>2 41</td>
<td>8 31</td>
<td>44 28</td>
</tr>
<tr>
<td>Clean nature and living environment</td>
<td>2 30</td>
<td>2 28</td>
<td>2 28</td>
<td>1 61</td>
<td>57 57</td>
</tr>
<tr>
<td>Welcoming</td>
<td>2 32</td>
<td>2 26</td>
<td>3 28</td>
<td>1 49</td>
<td>53 53</td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td>3 27</td>
<td>3 25</td>
<td>3 25</td>
<td>1 49</td>
<td>51 51</td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td>3 23</td>
<td>3 22</td>
<td>3 19</td>
<td>1 30</td>
<td>32 32</td>
</tr>
<tr>
<td>Safe</td>
<td>3 30</td>
<td>3 28</td>
<td>3 24</td>
<td>1 53</td>
<td>56 56</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>4 25</td>
<td>4 21</td>
<td>4 20</td>
<td>1 44</td>
<td>50 50</td>
</tr>
<tr>
<td>Innovative</td>
<td>3 23</td>
<td>4 20</td>
<td>3 22</td>
<td>1 36</td>
<td>38 38</td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td>4 23</td>
<td>4 20</td>
<td>4 21</td>
<td>1 33</td>
<td>34 34</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>21 26</td>
<td>21 23</td>
<td>25 23</td>
<td>1 70</td>
<td>64 64</td>
</tr>
</tbody>
</table>
Keywords, which are most associated with Estonia as a country (spontaneous answers)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?
% of those respondents, who have at least read or heard a bit about Estonia

- Friendly, hospitable: 31%
- Beautiful, clean: 16%
- Innovation, development: 16%
- Independent, free: 12%
- Culture: 12%
- Baltic country: 11%
- Eastern-Europe: 11%
- Nature: 10%
- Relates with Russia/USSR/communism: 9%
- Energetic, entrepreneurial: 9%
- Cold, grey, windy: 8%
- Calm, stable, safe: 8%
- European/EU country: 7%
- Vacation, spa, tourism: 6%
- Cheap: 4%
- Small: 4%
- Nordic country: 3%
- Tallinn: 3%
- Poor: 3%
- Other: 51%
How old is Estonia as a country? (spontaneous answers)
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

- 6% of the respondents knew, that Estonia will be celebrating its 100th birthday
- 72% of the respondents had no idea and 22% gave a wrong answer
Awareness and meaning of e-Estonia
% of those respondents, who have at least read or heard a bit about Estonia

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

- Yes: 22%
- No

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

- Things related with the Internet: 12%
- Modern and innovative (technologically advanced): 10%
- e-Residency/e-Nationality: 7%
- E-government and e-services: 5%
- Other: 44%
- Do not know: 24%

44% of the responses were not categorized due to a wide variety but some of the most frequent answers among them were positive adjectives, e.g. “nice”, “positive”, “attractive”, “good”, etc.
Awareness and meaning of ‘e-Residency’
% of those respondents, who have at least read or heard a bit about the respective country

Have you heard or seen the word ‘e-Residency’ before?
- Yes: 22%
- No: 78%

What does the word ‘e-Residency’ represent and mean in your opinion?
(spontaneous answers)
- e-Residency (doing business digitally): 9%
- e-Residency (electronic residence permit): 7%
- Great Internet access/technologically advanced: 6%
- Digital conduct/e-government: 3%

How likely would you consider becoming an Estonian e-Resident?
- Would certainly consider it: 42%
- Would probably consider it: 22%
- Would probably not consider it: 6%
- Would certainly not consider it: 22%
- Do not know: 10%

Answers under the label ‘Positive’ were just adjectives such as “nice”, “positive”, “attractive”, “good”, etc.
Openness towards Estonia

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

How would you assess your preparedness to...

- ...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
- ...go to work in Estonia (again)
- ...start your own business in Estonia as an entrepreneur (in the future)
- ...go to study in Estonia (again)

Low | Average on a 4-point scale | High
### Openness towards Estonia

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Low</th>
<th>% High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to Estonia (again) on holiday or travelling</td>
<td>7</td>
<td>32</td>
</tr>
<tr>
<td>Choose goods of Estonian origin, if possible</td>
<td>9</td>
<td>23</td>
</tr>
<tr>
<td>Buy cultural materials of Estonian origin (music, applied art, etc)</td>
<td>11</td>
<td>21</td>
</tr>
<tr>
<td>Conduct business cooperation with Estonian companies</td>
<td>13</td>
<td>22</td>
</tr>
<tr>
<td>Go to work in Estonia (again)</td>
<td>35</td>
<td>15</td>
</tr>
<tr>
<td>Start your own business in Estonia as an entrepreneur (in the future)</td>
<td>24</td>
<td>16</td>
</tr>
<tr>
<td>Go to study in Estonia (again)</td>
<td>36</td>
<td>15</td>
</tr>
</tbody>
</table>

- Not connected to entrepreneurial activities and not interested in this in any foreign country = 18%
- Not connected to entrepreneurial activities and not interested in this in any foreign country = 21%
The people of Greater London consider Switzerland (15%) to be the country with the cleanest air and environment in the world. Estonia was mentioned a small number of times (1%) and the ones who mentioned it the most were men between the ages of 25-34 and 35-49.

Results show that individuals from London mostly associate Japan (25%) with the concept of an 'information society' but also USA (23%). Again, Estonia was mentioned by 1% and the ones who named it the most were mostly people aged 35-49.

The residents of Greater London associated USA (19%) above all with the concept of an 'e-Country'. Estonia was not mentioned here much (2%) but once again, the main individuals who named Estonia were men aged 35-49.

Estonia, Latvia and Lithuania are equally familiar to residents of Greater London – about 1/10 of them have visited the Baltic countries and approximately half have heard or read about them. Compared to Finland and Denmark, the two have been visited and heard or read about much more. When comparing Estonia to the most known country - Denmark (31%) has been visited nearly by 20% more than Estonia (12%). Finland has been visited by 21%. Also, Finland has been heard about (55%) more than Estonia (46%).

Concepts of ‘e-Residency’ and ‘e-Estonia’ are rather unfamiliar to the people of London - the percentage of people who have heard about the concepts is 22%. Furthermore, even if they have heard about them, only a small amount of them also know the meaning behind those terms. 12% of the people in London who had heard the word before think ‘e-Estonia’ represents things related with the Internet and 10% believe it stands for 'modern and innovative'. Only 9% of the respondents who had heard about ‘e-Residency’ mentioned that it means the possibility for foreigners to do business in Estonia. 7% think that it represents a virtual citizen who has similar rights but does not have to be in the same country (electronic residence permit). When talking about e-Estonia and e-Residency, men between the ages of 25-34 know the most about them. Even though younger women have also heard about them, men generally know more about these topics.

Only 6% of the respondents knew that Estonia will be celebrating its 100th birthday. Among them, awareness was higher among men aged 35-49. Young men aged 18-24 and older women between the ages of 50-75 did not know at all that Estonia will be 100 years old.
Summary II

- When it comes to the reputation of countries, Estonia is still being associated more with Eastern Europe and Russia/USSR/communism, rather than being considered a Nordic or European country, especially by men aged 50-75. The funny fact is that the same group of respondents were the ones who mentioned independence and freedom the most. So it probably means that there are many who still live in the past and others who are more interested in the outside world.

- In the comparison of five countries (EST, LAT, LIT, FIN, DK), Finland and Denmark have the best reputation profile. Estonia is seen as slightly less affordable to visit than Latvia and Lithuania but much more affordable than Finland and Denmark. While Baltic countries have been rated quite the same for how clean their nature and living environment is, Finland’s (61%) and Denmark’s (57%) score is two times higher than Estonia’s (30%). Finland (53%) and Denmark (56%) are seen as much more safe than Estonia (30%). But compared to Latvia (28%) and Lithuania (24%), Estonia is considered to be the safest. The fact that Estonia is not as well-known as Finland and Denmark most likely plays a significant role here since the unknown is usually associated more with unsafe.

- On the positive side, when asking about keywords related to Estonia, the most popular ones were friendly (31%), beautiful (16%) and innovative (16%).

- Talking about openness, people from London are rather open towards Estonia. They are mostly interested in going to Estonia on holiday or for travelling. Respondents marked their preparedness to travel as ‘high’ five times more frequently than ‘low’. People from Greater London are positive about choosing goods and buying cultural materials of Estonian origin (one fifth of the respondents marked their preparedness as ‘high’). Also, conducting business cooperation with Estonian companies is ranked ‘high’ (22%) rather than ‘low’ (13%). But openness towards going to work in Estonia, starting their own business in Estonia as an entrepreneur and going to study in Estonia is rather low. Openness to studying in Estonia is ranked ‘low’ more than twice as many times (36%) as ‘high’ (15%). Same goes for working – 35% for ‘low’ and only 15% for ‘high’.

- The ones in Greater London who are the most open towards Estonia are men between the ages of 25-34.
Netherlands
Respondents’ profile

Total number of respondents is 520

GENDER
- male: 50%
- female: 50%

AGE
- 18-34: 29%
- 35-49: 29%
- 50-75: 42%

REGION
- North: 10%
- South: 24%
- West: 44%
- East: 22%

EDUCATION
- basic or secondary: 28%
- vocational: 23%
- higher: 47%

STATUS
- self-employed: 10%
- salaried employee: 44%
- on parental leave, housewife: 9%
- unemployed or a person seeking work: 9%
- retired: 19%
- pupil or student: 9%

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

31%
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?

Norway 17%
Switzerland 13%
Austria 10%
Sweden 8%
Estonia 0%

Dutch people also mentioned Iceland (6%), Netherlands (4%), Finland (4%), Spain (3%), Denmark (3%), New Zealand (3%), Australia (2%), Canada (2%), Portugal (2%), Croatia (1%), Ireland (1%), Italy (1%), Japan (1%), Greece (1%), Thailand (1%), UK (1%) and USA (1%). 16% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 6% of the respondents could not give an answer.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

Dutch people also associated UK (3%), Denmark (5%), Japan (2%), France (2%), Sweden (2%), China (1%), Italy (1%), Norway (1%), Finland (1%) and Russia (1%) with the concept of an “information society”. 19% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 13% of the respondents could not give an answer.
Country associated with the concept of an ‘e-Country’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

Dutch people also associate the following countries with the concept of an ‘e-Country’: Sweden (3%), France (2%), UK (2%), Estonia (1%), China (1%), Japan (1%) and Norway (1%). 6% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 34% of the respondents could not give an answer.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Estonia
  - 5% I have visited the country on a temporary basis
  - 30% I have read or heard a bit about the country
  - 31% I only know the name of the country
  - 5% Never heard of this country before
  - 5% This country is my permanent place of residence

- Latvia
  - 5% I have visited the country on a temporary basis
  - 31% I have read or heard a bit about the country
  - 5% I only know the name of the country
  - 5% Never heard of this country before
  - 30% This country is my permanent place of residence

- Lithuania
  - 5% I have visited the country on a temporary basis
  - 28% I have read or heard a bit about the country
  - 5% I only know the name of the country
  - 5% Never heard of this country before
  - 30% This country is my permanent place of residence

- Finland
  - 14% I have visited the country on a temporary basis
  - 46% I have read or heard a bit about the country
  - 46% I only know the name of the country
  - 5% Never heard of this country before
  - 8% This country is my permanent place of residence

- Denmark
  - 33% I have visited the country on a temporary basis
  - 45% I have read or heard a bit about the country
  - 14% I only know the name of the country
  - 5% Never heard of this country before
  - 3% This country is my permanent place of residence
Countries’ reputation profile I

Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

- Estonia
- Latvia
- Lithuania
- Finland
- Denmark

Affordable to visit

Welcoming

An Eastern European country

Clean nature and living environment

Clean, high-quality food

Safe

Able to offer top-quality products and services

Simple administrative procedures

Innovative

Visionary/pioneer

A Nordic country

Not at all characteristic  average on a 4-point scale  Very characteristic
### Countries’ reputation profile II

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Perception</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable to visit</td>
<td>1</td>
<td>1</td>
<td>14</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>Welcoming</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An Eastern European country</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>48</td>
<td>58</td>
</tr>
<tr>
<td>Clean nature and living environment</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Safe</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Innovative</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td>5</td>
<td>5</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>14</td>
<td>17</td>
<td>16</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

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Keywords, which are most associated with Estonia as a country (spontaneous answers)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?

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

<table>
<thead>
<tr>
<th>Keyword</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relates with Russia/USSR/communism</td>
<td>21%</td>
</tr>
<tr>
<td>Friendly, hospitable</td>
<td>20%</td>
</tr>
<tr>
<td>Nature</td>
<td>19%</td>
</tr>
<tr>
<td>Cold, grey, windy</td>
<td>14%</td>
</tr>
<tr>
<td>Eastern-Europe</td>
<td>12%</td>
</tr>
<tr>
<td>Beautiful, clean</td>
<td>12%</td>
</tr>
<tr>
<td>Culture</td>
<td>10%</td>
</tr>
<tr>
<td>Baltic country</td>
<td>9%</td>
</tr>
<tr>
<td>Innovation, development</td>
<td>9%</td>
</tr>
<tr>
<td>Independent, free</td>
<td>8%</td>
</tr>
<tr>
<td>European/EU country</td>
<td>7%</td>
</tr>
<tr>
<td>Small</td>
<td>7%</td>
</tr>
<tr>
<td>Baltic Sea</td>
<td>5%</td>
</tr>
<tr>
<td>Cheap</td>
<td>5%</td>
</tr>
<tr>
<td>Calm, stable, safe</td>
<td>5%</td>
</tr>
<tr>
<td>Energetic, entrepreneurial</td>
<td>5%</td>
</tr>
<tr>
<td>Poor</td>
<td>4%</td>
</tr>
<tr>
<td>Unsafe</td>
<td>3%</td>
</tr>
<tr>
<td>Unpleasant</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>49%</td>
</tr>
</tbody>
</table>

49% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)
How old is Estonia as a country? (spontaneous answers)

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

8% of the respondents knew, that Estonia will be celebrating its 100\textsuperscript{th} birthday

66% of the respondents had no idea and 26% gave a wrong answer
Awareness and meaning of e-Estonia
% of those respondents, who have at least read or heard a bit about Estonia

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

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>36%</td>
<td>64%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Estonia</th>
<th>20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>MS Estonia Ship</td>
<td>15%</td>
</tr>
<tr>
<td>E-government</td>
<td>6%</td>
</tr>
<tr>
<td>Modern and innovative (technologically advanced)</td>
<td>6%</td>
</tr>
<tr>
<td>Things related with the Internet</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>23%</td>
</tr>
<tr>
<td>Do not know</td>
<td>24%</td>
</tr>
</tbody>
</table>
Awareness and meaning of ‘e-Residency’

% of those respondents, who have at least read or heard a bit about the respective country

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

- Yes: 19%
- No: 81%

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

- e-Residency (electronic residence permit): 12%
- Great Internet access (technologically advanced): 9%
- Digital country: 3%
- Positive: 3%
- Other: 44%
- Cannot answer: 30%

44% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)

How likely would you consider becoming an Estonian e-Resident?

- Would certainly consider it: 9%
- Would probably consider it: 30%
- Would probably not consider it: 19%
- Would certainly not consider it: 12%
- Do not know: 20%
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about Estonia

How would you assess your preparedness to...

...choose goods of Estonian origin, if possible
...go to Estonia (again) on holiday or travelling
...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)

Not connected to entrepreneurial activities and not interested in this in any foreign country = 18%

Not connected to entrepreneurial activities and not interested in this in any foreign country = 23%
Openness towards Estonia

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Low</th>
<th>% High</th>
</tr>
</thead>
<tbody>
<tr>
<td>...choose goods of Estonian origin, if possible</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>...go to Estonia (again) on holiday or travelling</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>...buy cultural materials of Estonian origin (music, applied art, etc)</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>...conduct business cooperation with Estonian companies</td>
<td>16</td>
<td>10</td>
</tr>
<tr>
<td>...start your own business in Estonia as an entrepreneur (in the future)</td>
<td>23</td>
<td>5</td>
</tr>
<tr>
<td>...go to study in Estonia (again)</td>
<td>48</td>
<td>3</td>
</tr>
<tr>
<td>...go to work in Estonia (again)</td>
<td>51</td>
<td>2</td>
</tr>
</tbody>
</table>

Not connected to entrepreneurial activities and not interested in this in any foreign country = 18%

Not connected to entrepreneurial activities and not interested in this in any foreign country = 23%
The Dutch people are quite divided when it comes to choosing the country with the cleanest air and environment in the world. Even though Norway takes the first place with 17%, the remaining countries in the top 3 are not far behind – Switzerland with 13% and Austria with 10%. Apparently, Estonia did not come to mind here - 0% of the respondents mentioned it.

The concepts of ‘information society’ and ‘e-Country’ are associated with the same countries in the Netherlands – first the Netherlands itself, secondly the United States and thirdly Germany. Estonia was mentioned as an ‘e-Country’ by 1% of the respondents. Talking about ‘information society’, Estonia was not mentioned at all (0%).

When comparing five countries with each other (EST, LAT, LIT, FIN, DK), the Dutch people are the most familiar with Denmark. Estonia has been visited by only 5% of the people and Denmark by 33%. Knowledge of Estonia is very similar to knowledge of the other two Baltic countries. About ⅔ of the Dutch respondents only know the names of the Baltic countries. When comparing Estonia with its other neighbour Finland - Finland has been visited by 14% and people from Netherlands have also heard more about Finland (46%) than about Estonia (30%).

When talking about the reputation of the same five countries, Denmark has the best reputation profile and Finland’s results are also very close to it. Comparing Estonia to these two, the results of Denmark and Finland are at least two times better in every aspect. Except for when it comes to how affordable it is to visit the country. Here Estonia got 31% for ‘very characteristic’, Finland 17% and Denmark 18%. For example, in case of clean nature and living environment Estonia got 27% for ‘very characteristic’, Finland 71% and Denmark 60%. In other countries who participated in this survey, Estonia usually had the best reputation profile in comparison with other Baltic countries. What is interesting with Dutch people is that Latvia had better results. The biggest difference between Latvia and Estonia occurs in case of the welcoming indicator, where Estonia got 24% as very characteristic and Latvia 31%. Generally, within these five countries, Estonia got the worst result in this and also in simple administrative procedures.

It has to be noted that in the comparison of reputations, the differences between Baltic countries are not that big but the images of Denmark and Finland are significantly stronger.
The keyword that Dutch people associate the most with Estonia as a country is being related with Russia/USSR/communism (21%). At the same time, they believe Estonians are friendly and hospitable (20%) and they recognize Estonia for its nature (19%). 12% of the respondents mentioned Eastern Europe and only 1% considered Estonia to be a Nordic country. The ones who associate Estonia with Russia the most are elderly men aged 50-75, which has probably quite a lot to do with our history and that Dutch media is also still associating Estonia with Russia.

8% of the respondents, who have at least read or heard a bit about Estonia, knew that Estonia will be celebrating its 100th birthday. 66% had no idea and 26% gave a wrong answer. Among the ones who knew how old Estonia will be, women aged 50-75 knew the answer the most. Middle aged men (35-49 years old) were the ones who gave the wrong answer the most.

When it comes down to awareness and meaning of ‘e-Estonia’ and ‘e-Residency’, the Dutch people have heard or seen the word ‘e-Estonia’ (36%) more than ‘e-Residency’ (19%). But it does not matter much if people do not know the meaning behind it. 20% of the respondents who had heard about ‘e-Estonia’ think that it stands for Estonia and the next most popular answer was MS Estonia Ship (15%). Only 6% of them knew that it means e-government. Among the people who had heard about ‘e-Residency’, 12% know that it represents electronic residence permit and 9% thought it means having great Internet access (technologically advanced). So, as a conclusion, we can say that Dutch people do not know the words themselves much and even fewer of them know the meaning behind them.

People from Netherlands are not open towards Estonia at all. The only indicator where their preparedness is ranked more high than low is choosing goods of Estonian origin, if possible. But even there the high percentage is only 8 and low already 6. Going to Estonia on holiday or travelling is neutral, 13% marked their readiness as ‘high’ and 13% as ‘low’. For all others – buying cultural materials of Estonian origin, conducting business with Estonian companies, starting their own business in Estonia as an entrepreneur, going to study in Estonia and going to work in Estonia – Dutch people have rated their willingness low rather than high. Especially for going to study or going to work in Estonia - it is extremely low.

Men aged 25-34 are the most open towards Estonia in every aspect.
Respondents’ profile
Total number of respondents is 521

<table>
<thead>
<tr>
<th>GENDER</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>male</td>
<td>47%</td>
</tr>
<tr>
<td>female</td>
<td>53%</td>
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</table>

<table>
<thead>
<tr>
<th>AGE</th>
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</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>27%</td>
</tr>
<tr>
<td>35-49</td>
<td>29%</td>
</tr>
<tr>
<td>50-75</td>
<td>44%</td>
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</table>

<table>
<thead>
<tr>
<th>REGION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle and North</td>
<td>16%</td>
</tr>
<tr>
<td>West</td>
<td>31%</td>
</tr>
<tr>
<td>East</td>
<td>53%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EDUCATION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>basic or secondary</td>
<td>24%</td>
</tr>
<tr>
<td>vocational</td>
<td>17%</td>
</tr>
<tr>
<td>higher</td>
<td>58%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>STATUS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>self-employed</td>
<td>7%</td>
</tr>
<tr>
<td>salaried employee</td>
<td>52%</td>
</tr>
<tr>
<td>on parental leave, housewife</td>
<td>3%</td>
</tr>
<tr>
<td>unemployed or a person seeking work</td>
<td>10%</td>
</tr>
<tr>
<td>retired</td>
<td>19%</td>
</tr>
<tr>
<td>pupil or student</td>
<td>8%</td>
</tr>
</tbody>
</table>

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

NORWAY

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KANTAR EMOR
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?

Norwegian people also mentioned Sweden (4%), Denmark (4%), Finland (3%), Canada (2%), Spain (2%), Greenland (2%), New Zealand (2%), Australia (1%), UK (1%), Austria (1%), USA (1%), Croatia (1%), Greece (1%), Portugal and Thailand (1%). 7% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 5% of the respondents could not give an answer.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

- Norway 39%
- USA 15%
- Germany 10%
- Estonia 0%

Norwegian people also associated Sweden (7%), UK (5%), Denmark (4%), Japan (4%), Finland (2%), China (1%), France (1%), Korea (1%), Iceland (1%), Netherlands (1%) and Singapore (1%) with the concept of an “information society”. 5% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 13% of the respondents could not give an answer.
Country associated with the concept of an ‘e-Country’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

Norwegian people also associate the following countries with the concept of an ‘e-Country’: Sweden (5%), Japan (4%), China (4%), Denmark (3%), UK (3%), Korea (3%), Finland (1%), France (1%), Estonia (1%) and the Netherlands (1%). 6% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 30% of the respondents could not give an answer.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Estonia
  - 21% I have visited the country or lived in the country on a temporary basis
  - 32% I have read or heard a bit about the country
  - 34% I only know the name of the country
  - 40% Never heard of this country before
  - 49% This country is my permanent place of residence

- Latvia
  - 22% I have visited the country or lived in the country on a temporary basis
  - 34% I have read or heard a bit about the country
  - 40% I only know the name of the country
  - 41% Never heard of this country before
  - 49% This country is my permanent place of residence

- Lithuania
  - 15% I have visited the country or lived in the country on a temporary basis
  - 40% I have read or heard a bit about the country
  - 41% I only know the name of the country
  - 49% Never heard of this country before
  - 41% This country is my permanent place of residence

- Finland
  - 41% I have visited the country or lived in the country on a temporary basis
  - 49% I have read or heard a bit about the country
  - 41% I only know the name of the country
  - 49% Never heard of this country before
  - 41% This country is my permanent place of residence

- Denmark
  - 14% I have visited the country or lived in the country on a temporary basis
  - 85% I have read or heard a bit about the country
  - 41% I only know the name of the country
  - 49% Never heard of this country before
  - 41% This country is my permanent place of residence

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Countries’ reputation profile I

Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

Not at all characteristic | average on a 4-point scale | Very characteristic
---|---|---
Affordable to visit | |  
An Eastern European country | |  
Welcoming | |  
Able to offer top-quality products and services | |  
Safe | |  
Clean nature and living environment | |  
Clean, high-quality food | |  
Innovative | |  
Simple administrative procedures | |  
Visionary/pioneer | |  
A Nordic country | |  
Estonia | Latvia | Lithuania | Finland | Denmark

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### Countries’ reputation profile II

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable to visit</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>An Eastern European country</td>
<td>4</td>
<td>3</td>
<td>5</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Welcoming</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>3</td>
<td>7</td>
<td>7</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Safe</td>
<td>5</td>
<td>8</td>
<td>9</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Clean nature and living environment</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td>4</td>
<td>6</td>
<td>6</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Innovative</td>
<td>4</td>
<td>6</td>
<td>6</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td>5</td>
<td>8</td>
<td>10</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td>5</td>
<td>8</td>
<td>9</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>38</td>
<td>42</td>
<td>41</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

% Not at all characteristic | % Very characteristic

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NORWAY 91
Keywords, which are most associated with Estonia as a country (spontaneous answers)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?

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

- Cheap: 24%
- Culture: 21%
- Friendly, hospitable: 20%
- Relates with Russia/USSR/communism: 14%
- Eastern-Europe: 13%
- Baltic country: 10%
- Innovation, development: 10%
- Nature: 10%
- Vacation, spa, tourism: 9%
- Beautiful, clean: 7%
- Good food: 7%
- Small: 6%
- Unsafe: 6%
- Handicrafts, folklore: 6%
- Baltic Sea: 6%
- Calm, stable, safe: 5%
- Tallinn: 5%
- Poor: 5%
- Independent, free: 5%
- Other: 59%

59% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)

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How old is Estonia as a country? (spontaneous answers)

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

11% of the respondents knew, that Estonia will be celebrating its 100th birthday

72% of the respondents had no idea and 17% gave a wrong answer
Awareness and meaning of e-Estonia

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

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

- Yes: 31%
- No: 69%

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

- MS Estonia Ship: 21%
- Estonia: 17%
- E-government: 9%
- Modern and innovative (technologically advanced): 8%
- Things related with the Internet: 1%
- e-Residency/e-nationality: 1%
- Other: 10%
- Do not know: 35%
Awareness and meaning of ‘e-Residency’
% of those respondents, who have at least read or heard a bit about the respective country

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

- Yes: 11%
- No: 89%

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

- Digital country (doing business digitally): 51%
- e-Residency (doing business digitally): 12%
- Great Internet access (technologically advanced): 3%
- Other: 18%
- Cannot answer: 16%

18% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)

How likely would you consider becoming an Estonian e-Resident?

- Would certainly consider it: 0%
- Would probably consider it: 0%
- Would probably not consider it: 0%
- Would certainly not consider it: 0%
- Cannot answer: 16%
- Do not know: 0%

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

How would you assess your preparedness to...

- ...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)

Not connected to entrepreneurial activities and not interested in this in any foreign country = 21%
Not connected to entrepreneurial activities and not interested in this in any foreign country = 27%
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about Estonia

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Low</th>
<th>% High</th>
</tr>
</thead>
<tbody>
<tr>
<td>...go to Estonia (again) on holiday or travelling</td>
<td>5</td>
<td>31</td>
</tr>
<tr>
<td>...choose goods of Estonian origin, if possible</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>...buy cultural materials of Estonian origin (music, applied art, etc)</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>...conduct business cooperation with Estonian companies</td>
<td>30</td>
<td>10</td>
</tr>
<tr>
<td>...start your own business in Estonia as an entrepreneur (in the future)</td>
<td>38</td>
<td>4</td>
</tr>
<tr>
<td>...go to study in Estonia (again)</td>
<td>48</td>
<td>3</td>
</tr>
<tr>
<td>...go to work in Estonia (again)</td>
<td>52</td>
<td>2</td>
</tr>
</tbody>
</table>
Norwegian people think very highly about their country. Half of the respondents marked down **Norway** (50%) as the country with the **cleanest air and environment** in the world. **Iceland** was the second most mentioned country with 15%, followed by **Switzerland** with 5%. **Estonia** was not mentioned at all (0%).

Same goes for the country associated with the concept of an ‘information society’. **Norway** was mentioned the most by far (39%). **USA** was the runner-up with 15% and **Germany** was 3rd with 10%. Again, **Estonia** was not mentioned at all and got 0%.

Talking about a country associated with the concept of an ‘e-Country’, the results are quite similar. **Norway** is first with 29%, **USA** second (8%) and **Germany** third (7%). But this time **Estonia** was also mentioned. Not a lot, only with 1%, in spite of that it is still better than 0.

In the comparison of five countries (EST, LAT, LIT, FIN, DK), **Denmark is the most known** by respondents from Norway – 85% of them have visited the country and 14% have heard or read about it. Comparing this to **Estonia** - only 21% of the respondents have visited the country and 32% have heard about it. **Finland** is also known very well among Norwegians but they have visited Denmark twice as much. Among the three Baltic countries, **Lithuania** is the least known and visited (15%). **Estonia** and **Latvia** are known and visited more or less frequently. **Estonia** received answers under the option of “never heard of this country before”. The result was luckily only 1% but it still exists. The ones who have not heard about Estonia are young people, 18-24 years old.

Comparing the same five countries with each other, **Denmark has the best reputation profile. Finland** is also quite close to it. While comparing **Estonia** to **Denmark**, Denmark’s results are at least three times better in case of most indicators. For example with how innovative the country is, **Denmark** (41%) was rated ‘very characteristic’ almost four times more than **Estonia** (10%). In case of visionary, Denmark’s results were eight times higher in ‘very characteristic’. As with most of the other countries who participated in the survey, the only place where Estonia got a better result was how **affordable** it is to visit the country. When Estonia is compared to other Baltic countries, the difference is quite small between Estonia and Latvia but slightly bigger between Estonia and Lithuania. Estonia got slightly better results in case of **clean natural and living environment** and **simple administrative procedures** but generally the differences are very small.
Summary II

Norwegians mostly associate Estonia with being cheap (24%). Among the keywords they associate with Estonia as a country, the 2nd most mentioned one was culture (architecture, music etc.) (21%) and the 3rd was friendly and hospitable with 20%. Many respondents associate Estonia with Russia/USSR/communism (14%) and label it under Eastern Europe (13%). Nordic country was mentioned only by 3%.

11% of the respondents who have at least read or heard a bit about Estonia, knew that Estonia will be celebrating its 100th birthday. 72% had no idea and 17% gave a wrong answer. Young men (18-24 years old) were the ones who knew the best how old Estonia is but they were also the ones who gave the most wrong answers. In general, it seems that they were just bold enough to guess the age instead of answering that they didn't know.

31% of the respondents had heard the word ‘e-Estonia’ before but only 9% of them knew that it stands for e-government. 21% thought it represents the ship MS Estonia and 17% thought it just means Estonia. With ‘e-Residency’ only 11% of the respondents had heard or seen the word before. 51% of them thought it stands for digital country and 12% knew it means virtual residence permit (doing business digitally). Among the respondents who had heard about ‘e-Residency’, 0% marked down their willingness to certainly consider becoming Estonian e-Resident. Since the majority of respondents do not know what ‘e-Residency’ means, it is quite understandable why the percentage was zero for this one.

Norwegian people are not very open towards Estonia. They are rather positive about going to Estonia on holiday or travelling and about choosing goods of Estonian origin, but these intentions are not very strong. In case of buying cultural materials of Estonian origin, the result is not as bad compared to others but it is still negative. When it comes to conducting business cooperation with Estonian companies, starting their own business in Estonia as an entrepreneur, going to study or work in Estonia, their preparedness is very low. Especially for going to study or to work in Estonia, the result is by far the lowest.

Openness towards Estonia is lowest among men aged 25-34. When talking about working, studying and business, it is also very low among older respondents (50-75) but it is understandable that they are not interested in these activities. The ones who are the most interested in travelling to Estonia are young men (18-24 years old).
Russia
(Moscow and St. Petersburg)
### Respondents’ profile

Total number of respondents is 1028

#### GENDER

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>50%</td>
</tr>
</tbody>
</table>

#### AGE

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>34%</td>
</tr>
<tr>
<td>35-49</td>
<td>28%</td>
</tr>
<tr>
<td>50-75</td>
<td>38%</td>
</tr>
</tbody>
</table>

#### REGION

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>St Petersburg</td>
<td>50%</td>
</tr>
<tr>
<td>Moscow</td>
<td>50%</td>
</tr>
</tbody>
</table>

#### EDUCATION

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic or secondary</td>
<td>3%</td>
</tr>
<tr>
<td>Vocational</td>
<td>11%</td>
</tr>
<tr>
<td>Higher</td>
<td>85%</td>
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</tbody>
</table>

#### STATUS

<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-employed</td>
<td>19%</td>
</tr>
<tr>
<td>Salaried employee</td>
<td>53%</td>
</tr>
<tr>
<td>On parental leave, housewife</td>
<td>5%</td>
</tr>
<tr>
<td>Unemployed or a person seeking work</td>
<td>7%</td>
</tr>
<tr>
<td>Retired</td>
<td>9%</td>
</tr>
<tr>
<td>Pupil or student</td>
<td>6%</td>
</tr>
</tbody>
</table>

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: 42%
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?

Sweden 12%  Finland 11%  Norway 8%  Greece 7%  Estonia 1%

Russian people also mentioned Spain (5%), Thailand (4%), Iceland (3%), Italy (3%), Cyprus (3%), New Zealand (3%), Austria (2%), Croatia (2%), Australia (1%), Estonia (1%), Netherlands (1%), Japan (1%), Canada (1%), Portugal (1%) and UK (1%). 31% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 2% of the respondents could not give an answer.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

USA 21%

Japan 14%

Germany 14%

Estonia 2%

Russian people also associated China (4%), France (4%), Sweden (4%), UK (4%), Finland (3%), Estonia (2%), Italy (2%), Singapore (2%), Netherlands (1%), Korea (1%) and Norway (1%) with the concept of an “information society”. 13% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 7% of the respondents could not give an answer.
Country associated with the concept of an ‘e-Country’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘e-Country’?

Japan 24%
USA 21%
Germany 8%
Estonia 3%

Russian people also associate the following countries with the concept of an ‘e-Country’: China (7%), Sweden (4%), Russia (4%), Estonia (3%), Korea (3%), Singapore (3%), Finland (3%), France (2%), UK (2%), Netherlands (1%) and Norway (1%). 9% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 6% of the respondents could not give an answer.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Estonia
- Latvia
- Lithuania
- Finland
- Denmark

- 40% I have visited the country or lived in the country on a temporary basis
- 51% I have read or heard a bit about the country
- 51% I only know the name of the country
- 54% Never heard of this country before
- 47% This country is my permanent place of residence

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Countries’ reputation profile I

Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

<table>
<thead>
<tr>
<th>Feature</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
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</thead>
<tbody>
<tr>
<td>Clean, high-quality food</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clean nature and living environment</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>
</tr>
<tr>
<td>A Nordic country</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Able to offer top-quality products and services</td>
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<tr>
<td>Safe</td>
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<tr>
<td>Affordable to visit</td>
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<tr>
<td>Simple administrative procedures</td>
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<tr>
<td>Welcoming</td>
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<tr>
<td>Innovative</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td></td>
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</tr>
</tbody>
</table>

Not at all characteristic average on a 4-point scale Very characteristic
### Countries’ reputation profile II

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Feature</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean, high-quality food</td>
<td>2%</td>
<td>21%</td>
<td>20%</td>
<td>55%</td>
<td>42%</td>
</tr>
<tr>
<td>Clean nature and living environment</td>
<td>2%</td>
<td>22%</td>
<td>19%</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>An Eastern European country</td>
<td>83%</td>
<td>34%</td>
<td>35%</td>
<td>33%</td>
<td>16%</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>1%</td>
<td>25%</td>
<td>18%</td>
<td>1%</td>
<td>48%</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>6%</td>
<td>18%</td>
<td>15%</td>
<td>1%</td>
<td>46%</td>
</tr>
<tr>
<td>Safe</td>
<td>1%</td>
<td>16%</td>
<td>13%</td>
<td>2%</td>
<td>37%</td>
</tr>
<tr>
<td>Affordable to visit</td>
<td>1%</td>
<td>15%</td>
<td>14%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td>1%</td>
<td>11%</td>
<td>9%</td>
<td>2%</td>
<td>21%</td>
</tr>
<tr>
<td>Welcoming</td>
<td>12%</td>
<td>15%</td>
<td>12%</td>
<td>1%</td>
<td>29%</td>
</tr>
<tr>
<td>Innovative</td>
<td>9%</td>
<td>8%</td>
<td>7%</td>
<td>1%</td>
<td>21%</td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td>12%</td>
<td>8%</td>
<td>6%</td>
<td>2%</td>
<td>22%</td>
</tr>
</tbody>
</table>
Keywords, which are most associated with Estonia as a country (spontaneous)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?

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

62% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)
How old is Estonia as a country? (spontaneous answers)
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

18% of the respondents knew, that Estonia will be celebrating its 100th birthday

63% of the respondents had no idea and 19% gave a wrong answer
Awareness and meaning of e-Estonia

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

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

- E-government: 35%
- Modern and innovative (technologically advanced): 7%
- Estonia: 7%
- Things related with the Internet: 4%
- e-Residency/e-Nationality: 2%
- Other: 35%
- Do not know: 9%

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

- Yes: 20%
- No: 80%
Awareness and meaning of ‘e-Residency’

% of those respondents, who have at least read or heard a bit about the respective country

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

- No: 84%
- Yes: 16%

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

- e-Residency (electronic residence permit): 36%
- Digital country: 5%
- e-Residency (doing business digitally): 4%
- Great Internet access (technologically advanced): 1%
- Other: 47%
- Cannot answer: 6%

47% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)

How likely would you consider becoming an Estonian e-Resident?

- Would certainly consider it: 15%
- Would probably consider it: 16%
- Would probably not consider it: 16%
- Would certainly not consider it: 16%
- Do not know: 13%
- Cannot answer: 6%

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

How would you assess your preparedness to...

...go to Estonia (again) on holiday or travelling
...choose goods of Estonian origin, if possible
...conduct business cooperation with Estonian companies
...buy cultural materials of Estonian origin (music, applied art, etc)
...start your own business in Estonia as an entrepreneur (in the future)
...go to work in Estonia (again)
...go to study in Estonia (again)

Low
Average on a 4-point scale
High

Not connected to entrepreneurial activities and not interested in this in any foreign country = 13%
Not connected to entrepreneurial activities and not interested in this in any foreign country = 14%
### Openness towards Estonia

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

#### How would you assess your preparedness to...

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Low</th>
<th>% High</th>
</tr>
</thead>
<tbody>
<tr>
<td>go to Estonia (again) on holiday or travelling</td>
<td>12</td>
<td>32</td>
</tr>
<tr>
<td>choose goods of Estonian origin, if possible</td>
<td>9</td>
<td>17</td>
</tr>
<tr>
<td>conduct business cooperation with Estonian companies</td>
<td>19</td>
<td>13</td>
</tr>
<tr>
<td>buy cultural materials of Estonian origin (music, applied art, etc)</td>
<td>17</td>
<td>9</td>
</tr>
<tr>
<td>start your own business in Estonia as an entrepreneur (in the future)</td>
<td>27</td>
<td>8</td>
</tr>
<tr>
<td>go to work in Estonia (again)</td>
<td>42</td>
<td>8</td>
</tr>
<tr>
<td>go to study in Estonia (again)</td>
<td>41</td>
<td>7</td>
</tr>
</tbody>
</table>

Not connected to entrepreneurial activities and not interested in this in any foreign country = 13%

Not connected to entrepreneurial activities and not interested in this in any foreign country = 14%
Summary I

- In Russia the answers for the country with the **cleanest air and environment** in the world were very diverse but the number of respondents was almost double compared to all other countries. The top three countries Russians mentioned the most were all Nordic countries – **Sweden** (12%), **Finland** (11%) and **Norway** (8%). **Estonia** was mentioned a relatively small number of times with a result of 1%.

- The country they associated with the concept of an ‘**information society’** the most was **USA** (21%). USA was followed by **Japan** and **Germany**, which both were mentioned equally by 14% of the respondents. **Estonia** was named by 2% of the respondents.

- The top three countries associated with the concept of an ‘**e-Country’** the most were the same as in case of ‘information society’ but in a different order. **Japan** took the first place with 24%, **USA** followed with 21% and **Germany** was slightly behind with 8%. **Estonia** was mentioned here by 3%. Maybe the most interesting thing about this category is that for the first time in this survey **Russia made it into the ranking with 4%**.

- **All five countries** (EST, LAT, LIT, FIN, DK) are well-known among Russians. Among them, **Estonia** has been visited the most (54%), followed by **Latvia** with 47%. **Denmark** (19%) is the least visited. Results show that Estonia has been visited the least by younger people (18-24 years old).

- In the comparison of the same five countries, **Finland** has the best reputation profile. In all aspects **Finland** got at least two, occasionally even three times better results than **Estonia** (with the exception of how affordable it is to visit the country). For example, while 18% of the respondents marked that it is very characteristic for **Estonia** to be able to offer top-quality products and services – **Finland’s** result was 62%. When comparing **Estonia to other Baltic countries**, it has the best reputation profile. It is seen more as a **Nordic country** than **Latvia** and **Lithuania**. Also **safer**. **Denmark** has a much better reputation profile than Estonia but worse than Finland.
The keywords, which are most associated with Estonia as a country are **calm, stable, safe (19%)**, Tallinn (15%) and being **slow (12%)**. Quite a few **unpleasant** words (unfriendly etc.) were mentioned by Russians and negative keywords added up to a total of 11%. Also, some completely new categories could be formed by categorizing the results, such as **Nazism (5%)**, **prejudice towards Russians (6%)** and **Fascism (1%)**.

18% of the respondents knew that Estonia will be celebrating its **100th birthday**. 63% had no idea and 19% gave a wrong answer.

Talking about ‘e-Estonia’ and ‘e-Residency’, Russian respondents had not really heard or seen these words before but the ones who had, knew the meaning relatively well. ‘e-Estonia’ has been heard by **20%** and **35%** of them knew that it stands for e-government. 7% associated it with **modern and innovative (technologically advanced)**. The term ‘e-Residency’ has been heard less, with **16%** of the respondents knowing about it. 36% of them believe it represents **electronic residence permit** and 5% that it means a **digital country**. 15% of the respondents who have heard about ‘e-Residency’ answered that they would certainly consider becoming an Estonian e-Resident. The ones who were most open towards it were mostly **young men** (18-24 years old).

Respondents from St. Petersburg and Moscow are **not very open towards Estonia**. They are mostly positive about going to Estonia on holiday or travelling, where 32% of the respondents were very open to it. They are also rather positive about choosing goods of Estonian origin (17% are very open to it). For conducting business cooperation with Estonian companies, buying cultural materials of Estonian origin, starting their own business in Estonia as an entrepreneur, going to work and going to study in Estonia, Russians marked their preparedness as **low**. Especially in regards of going to work and going to study in Estonia, the proportion of respondents with a negative attitude was very high.

The survey results brought out an interesting fact - people from St. Petersburg and Moscow are more connected to entrepreneurial activities than other respondents from other countries.

**Young men**, aged 18-24, are generally the most open towards Estonia. Women in all age groups tend to be more open towards considering travelling and going on holiday to Estonia.
Sweden
Respondents’ profile

Total number of respondents is 520

**GENDER**
- Male: 50%
- Female: 50%

**AGE**
- 18-34: 30%
- 35-49: 27%
- 50-75: 43%

**REGION**
- North: 15%
- Middle: 20%
- East: 21%
- West: 20%
- South-East: 9%
- South: 15%

**EDUCATION**
- Basic or secondary: 41%
- Vocational: 15%
- Higher: 44%

**STATUS**
- Self-employed: 7%
- Salaried employee: 48%
- On parental leave, housewife: 3%
- Unemployed or a person seeking work: 7%
- Retired: 23%
- Pupil or student: 12%

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: 28%
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?

- **Sweden** 27%
- **Norway** 20%
- **Iceland** 17%
- **Estonia** 0%

Swedish people also mentioned Greenland (4%), Finland (4%), Switzerland (4%), New Zealand (3%), Canada (2%), Africa (1%) Austria (1%), Australia (1%), Spain (1%), Croatia (1%), Italy (1%), Greece (1%), Denmark (1%) and UK (1%). 9% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 6% of the respondents could not give an answer.
Country associated with the concept of an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

Swedish people also associated Japan (4%), Norway (3%), Netherlands (2%), China (1%), Italy (1%), Finland (1%) and Denmark (1%) with the concept of an “information society”. 4% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 11% of the respondents could not give an answer.
Swedish people also associate the following countries with the concept of an ‘e-Country’: Norway (2%), Denmark (2%), UK (2%), Netherlands (1%), Japan (1%) and France (1%). 6% of the respondents mentioned other countries, which were mentioned less than 10 times and were therefore not categorized. 31% of the respondents could not give an answer.
Familiarity with countries
To what extent are you acquainted with the following countries?

- Estonia
  - 34% I have visited the country or lived in the country on a temporary basis
  - 22% I have read or heard a bit about the country
  - 9% I only know the name of the country
  - 50% Never heard of this country before
- Latvia
  - 34% I have visited the country or lived in the country on a temporary basis
  - 22% I have read or heard a bit about the country
  - 9% I only know the name of the country
  - 57% Never heard of this country before
- Lithuania
  - 34% I have visited the country or lived in the country on a temporary basis
  - 22% I have read or heard a bit about the country
  - 9% I only know the name of the country
  - 66% Never heard of this country before
- Finland
  - 34% I have visited the country or lived in the country on a temporary basis
  - 30% I have read or heard a bit about the country
  - 67% I only know the name of the country
  - 86% Never heard of this country before
- Denmark
  - 12% I have visited the country or lived in the country on a temporary basis
  - 12% I have read or heard a bit about the country
  - 22% I only know the name of the country
  - 86% Never heard of this country before

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Countries’ reputation profile I

Irrespective of how well you are acquainted with these countries as a place of residence, place of work, or a holiday destination, please assess the general impression these countries have 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 the respective country

<table>
<thead>
<tr>
<th>Feature</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Eastern European country</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordable to visit</td>
<td></td>
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<tr>
<td>Welcoming</td>
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<tr>
<td>Simple administrative procedures</td>
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<tr>
<td>Clean nature and living environment</td>
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<tr>
<td>Safe</td>
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<td></td>
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<tr>
<td>Able to offer top-quality products and services</td>
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<tr>
<td>Innovative</td>
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<td></td>
</tr>
<tr>
<td>Clean, high-quality food</td>
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<td></td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>A Nordic country</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Not at all characteristic       average on a 4-point scale       Very characteristic
## Countries’ reputation profile II

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Estonia</th>
<th>Latvia</th>
<th>Lithuania</th>
<th>Finland</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Eastern European country</td>
<td>3 42</td>
<td>3 40</td>
<td>4 44</td>
<td>52 5</td>
<td>76 3</td>
</tr>
<tr>
<td>Affordable to visit</td>
<td>1 30</td>
<td>1 28</td>
<td>1 23</td>
<td>6 6</td>
<td>11 5</td>
</tr>
<tr>
<td>Welcoming</td>
<td>1 16</td>
<td>3 16</td>
<td>3 11</td>
<td>1 25</td>
<td>3 45</td>
</tr>
<tr>
<td>Simple administrative procedures</td>
<td>2 5</td>
<td>3 2</td>
<td>3 3</td>
<td>1 20</td>
<td>1 23</td>
</tr>
<tr>
<td>Clean nature and living environment</td>
<td>3 7</td>
<td>5 5</td>
<td>6 3</td>
<td>42 19</td>
<td>1 35</td>
</tr>
<tr>
<td>Safe</td>
<td>5 7</td>
<td>7 4</td>
<td>7 5</td>
<td>41 36</td>
<td>1 36</td>
</tr>
<tr>
<td>Able to offer top-quality products and services</td>
<td>3 5</td>
<td>3 4</td>
<td>5 2</td>
<td>40 36</td>
<td>1 36</td>
</tr>
<tr>
<td>Innovative</td>
<td>3 5</td>
<td>4 3</td>
<td>5 4</td>
<td>18 20</td>
<td>1 20</td>
</tr>
<tr>
<td>Clean, high-quality food</td>
<td>4 4</td>
<td>3 2</td>
<td>5 3</td>
<td>33 18</td>
<td>1 18</td>
</tr>
<tr>
<td>Visionary/pioneer</td>
<td>7 4</td>
<td>7 2</td>
<td>8 2</td>
<td>16 18</td>
<td>1 18</td>
</tr>
<tr>
<td>A Nordic country</td>
<td>50 7</td>
<td>47 5</td>
<td>48 2</td>
<td>1 79</td>
<td>80 8</td>
</tr>
</tbody>
</table>
Keywords, which are most associated with Estonia as a country (spontaneous)

Please provide three keywords, which are most associated with Estonia as a country in your opinion?
% of those respondents, who have at least read or heard a bit about Estonia

- Cheap 18%
- Relates with Russia/USSR/communism 16%
- Culture 14%
- Friendly, hospitable 14%
- Vacation, spa, tourism 14%
- Beautiful, clean 12%
- Innovation, development 10%
- Eastern-Europe 9%
- Nature 9%
- Baltic country 8%
- Independent, free 7%
- Poor 7%
- Tallinn 7%
- Cold, grey, windy 7%
- Unsafe 6%
- Good food 5%
- Energetic, entrepreneurial 5%
- Handicrafts, folklore 3%
- Alcohol 3%
- Other 3%

54% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)

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How old is Estonia as a country? (spontaneous answers)
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

4% of the respondents knew, that Estonia will be celebrating its 100th birthday

80% of the respondents had no idea and 16% gave a wrong answer
Awareness and meaning of e-Estonia

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

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

(spontaneous answers)

- MS Estonia Ship: 29%
- Estonia: 19%
- Things related with the Internet: 9%
- E-government: 4%
- Modern and innovative (technologically advanced): 3%
- Other: 13%
- Do not know: 24%
Awareness and meaning of ‘e-Residency’
% of those respondents, who have at least read or heard a bit about the respective country

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

- Yes: 10%
- No: 90%

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

- Digital country: 20%
- E-Residency (doing business digitally): 11%
- Great Internet access: 2%
- Positive: 2%
- Other: 51%
- Cannot answer: 14%

How likely would you consider becoming an Estonian e-Resident?

- Would certainly consider it: 10%
- Would probably consider it: 10%
- Would probably not consider it: 10%
- Would certainly not consider it: 10%
- Do not know: 10%

51% of the responses were not categorized due to a wide variety (but also due to absurdity or senselessness of answers)
Openness towards Estonia
% of those respondents, who have at least read or heard a bit about Estonia

How would you assess your preparedness to...

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

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

...choose goods of Estonian origin, if possible

...conduct business cooperation with Estonian companies

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

...go to work in Estonia (again)

...go to study in Estonia (again)

Not connected to entrepreneurial activities and not interested in this in any foreign country = 22%

Not connected to entrepreneurial activities and not interested in this in any foreign country = 28%

Low Average on a 4-point scale High
Openness towards Estonia  
% of those respondents, who have at least read or heard a bit about Estonia

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Low</th>
<th>% High</th>
</tr>
</thead>
<tbody>
<tr>
<td>...go to Estonia (again) on holiday or travelling</td>
<td>9</td>
<td>15</td>
</tr>
<tr>
<td>...buy cultural materials of Estonian origin (music, applied art, etc)</td>
<td>17</td>
<td>9</td>
</tr>
<tr>
<td>...choose goods of Estonian origin, if possible</td>
<td>14</td>
<td>5</td>
</tr>
<tr>
<td>...conduct business cooperation with Estonian companies</td>
<td>22</td>
<td>8</td>
</tr>
<tr>
<td>...start your own business in Estonia as an entrepreneur (in the future)</td>
<td>39</td>
<td>3</td>
</tr>
<tr>
<td>...go to work in Estonia (again)</td>
<td>54</td>
<td>2</td>
</tr>
<tr>
<td>...go to study in Estonia (again)</td>
<td>55</td>
<td>2</td>
</tr>
</tbody>
</table>
Summary I

- Swedish people consider **Sweden** (27%) to be the country with the **cleanest air and environment in the world** (27%). **Norway** (20%) was chosen as second and **Iceland** third (17%). **Estonia** was not mentioned at all.

- Results show that individuals from Sweden mostly associate **Sweden** (46%) with the concept of an **'information society’** but also **USA** (17%). Again, **Estonia** was not mentioned at all.

- Same goes for the country the Swedish people associate with the concept of an **‘e-Country’. Sweden** is first (42%) followed by **USA** (9%). **Estonia** was not mentioned at all.

- While comparing Estonia to other Baltic countries, Estonia is known and visited the most. **Estonia** has been visited by 34%, **Latvia** by 22% and **Lithuania** by 9%. The number of people who have only heard of Estonia is the biggest among women aged 18-24 and they are also the ones who have visited Estonia the least, together with women aged 25-34. **Swedish people know and have visited Finland (67%) and Denmark (86%) much more than Estonia.**

- Both terms **‘e-Estonia’** and **‘e-Residency’** are **unfamiliar** to the Swedish people. 20% of the respondents have heard or seen the word ‘e-Estonia’ before and 29% of them thought it stood for the ship MS Estonia. The term ‘e-Residency’ was not a new word for only 10% of them. 20% of them believe it means ‘digital country’ and 11% that it represents ‘doing business digitally’. Among those few Swedish people who would consider becoming an Estonian e-Resident, the biggest share is composed of men aged 25-34 and residents of the capital.

- Only 4% of the respondents knew that Estonia will be celebrating its **100th birthday**. 80% of them did not even have a clue. The ones who were most aware of how old Estonia is going to be were men between the ages of 18-24 and 50-75. The respondents who had no idea about the age of Estonia were mostly young women between the ages of 18 and 34.
Finland (41%) and Denmark (35%) are seen as much safer than Estonia (7%). But compared to Latvia (4%) and Lithuania (5%), Estonia is considered to be the safest. While comparing the five countries (EST, LAT, LIT, FIN, DK) with each other, Finland has the best reputation in the eyes of Swedish people. Among the 11 indicators, the only one Estonia got better results in is how affordable it is to visit the country. Estonia is seen as a little bit less affordable to visit than Latvia and Lithuania but much more affordable than Finland and Denmark.

When talking about the reputation of the countries, Estonia is seen as an Eastern European country much more than a Nordic country.

While Estonia is being rated a little higher in case of clean nature and living environment than Latvia and Lithuania, people gave the highest rating to Finland, its result being 6 times higher than that of Estonia.

When Swedish people were asked about keywords they associate most with Estonia, it turned out that they see Estonia as a cheap (18%) country that they still associate with Russia/USSR/communism (16%). On the bright side, culture (architecture, music etc.) was mentioned many times (14%). So were friendliness and hospitality – by 14%. It seems that they know Estonia for tourism as well because this was also mentioned by 14%.

Swedish people do not seem very open towards Estonia. The only indicator that has a higher percentage on the positive side is ‘going to Estonia on holiday or travelling’. Even here the results are not so good - while 15% marked their willingness as high, low willingness received 9%. Conducting business cooperation is more attractive than wanting to start their own business in Estonia as an entrepreneur (in the future) but both indicators are still quite low. The readiness to work or study in Estonia is very low for Swedish people (2%).

The ones who are the most open towards Estonia are young men aged 25-34 but also middle-aged men aged 35-49.
Comparison of the results in 8 countries
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</td>
<td>503</td>
</tr>
<tr>
<td>Finland</td>
<td>520</td>
</tr>
<tr>
<td>Germany</td>
<td>511</td>
</tr>
<tr>
<td>GL</td>
<td>520</td>
</tr>
<tr>
<td>NL</td>
<td>520</td>
</tr>
<tr>
<td>Norway</td>
<td>521</td>
</tr>
<tr>
<td>Russia</td>
<td>1028</td>
</tr>
<tr>
<td>Sweden</td>
<td>520</td>
</tr>
<tr>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>28%</td>
<td></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>8</td>
<td>80</td>
<td>88</td>
<td>40</td>
</tr>
<tr>
<td>Finland</td>
<td>87</td>
<td>12</td>
<td>45</td>
<td>64</td>
<td>51</td>
</tr>
<tr>
<td>Germany</td>
<td>9</td>
<td>57</td>
<td>8</td>
<td>15</td>
<td>42</td>
</tr>
<tr>
<td>Greater London</td>
<td>12</td>
<td>46</td>
<td>11</td>
<td>21</td>
<td>31</td>
</tr>
<tr>
<td>Netherlands</td>
<td>5</td>
<td>30</td>
<td>5</td>
<td>14</td>
<td>33</td>
</tr>
<tr>
<td>Norway</td>
<td>21</td>
<td>32</td>
<td>22</td>
<td>41</td>
<td>85</td>
</tr>
<tr>
<td>Russia</td>
<td>54</td>
<td>40</td>
<td>47</td>
<td>42</td>
<td>19</td>
</tr>
<tr>
<td>Sweden</td>
<td>34</td>
<td>50</td>
<td>22</td>
<td>67</td>
<td>86</td>
</tr>
</tbody>
</table>

Read: 9% of Germany residents have visited Estonia or have lived here temporarily and 57% have heard or read about Estonia.
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>% Thinking of Country</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>

**1. Estonia: 16%**

**2. Finland: 52%**

**3. Germany: 15%**

**4. Greater London: 15%**

**5. Netherlands: 17%**

**6. Norway: 50%**

**7. Russia: 12%**

**8. Sweden: 27%**

*Read: 15% 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 an ‘information society’ (spontaneous answers)

Thinking about the countries you know of, which would you associate first with the concept of an ‘information society’?

1. Estonia 53%
2. Greater London 25%
3. Finland 37%
4. Germany 26%
5. Netherlands 23%
6. Norway 39%
7. Russia 21%
8. Sweden 46%

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-State’?

<table>
<thead>
<tr>
<th>Country</th>
<th>% Estonia</th>
<th>% Finland</th>
<th>% Germany</th>
<th>% Netherlands</th>
<th>% Norway</th>
<th>% Russia</th>
<th>% Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>83%</td>
<td>5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greater London</td>
<td>19%</td>
<td></td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td>31%</td>
<td>19%</td>
<td></td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>20%</td>
<td></td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>31%</td>
<td></td>
<td></td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td>29%</td>
<td></td>
<td></td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td>24%</td>
<td></td>
<td></td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>42%</td>
<td></td>
<td></td>
<td>9%</td>
<td></td>
<td></td>
<td></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.
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 the respective country

Average assessments on a 4-point scale

- 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)
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 the respective country

- 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

% of „very characteristic“
Keywords, which are most associated with Estonia as a country (spontaneous)

% of those respondents, who have at least read or heard a bit about the respective country

<table>
<thead>
<tr>
<th>Category</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>18%</td>
<td>16%</td>
<td>20%</td>
<td>20%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Beautiful, clean</td>
<td>16%</td>
<td>3%</td>
<td>10%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Innovation, development</td>
<td>16%</td>
<td>30%</td>
<td>15%</td>
<td>9%</td>
<td>10%</td>
<td>4%</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>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Independent, free</td>
<td>12%</td>
<td>20%</td>
<td>15%</td>
<td>8%</td>
<td>5%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Baltic country</td>
<td>11%</td>
<td>2%</td>
<td>17%</td>
<td>9%</td>
<td>10%</td>
<td>11%</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>9%</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>9%</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>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Russia/USSR/communism</td>
<td>9%</td>
<td>6%</td>
<td>20%</td>
<td>21%</td>
<td>14%</td>
<td>4%</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>19%</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>5%</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>7%</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>4%</td>
<td>14%</td>
</tr>
<tr>
<td>Cheap</td>
<td>4%</td>
<td>16%</td>
<td>1%</td>
<td>5%</td>
<td>24%</td>
<td>7%</td>
<td>18%</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>2%</td>
<td>2%</td>
<td>7%</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>2%</td>
<td>15%</td>
</tr>
<tr>
<td>Alcohol</td>
<td>2%</td>
<td>7%</td>
<td>2%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>
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%
- Sweden: 8%
- Denmark: 11%
- Russia: 18%
- Norway: 4%
## 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></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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>10%</td>
<td>12%</td>
<td>10%</td>
<td>6%</td>
<td>8%</td>
<td>7%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>7%</td>
<td>12%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>E-Residency/e-nationality</th>
<th>5%</th>
<th>40%</th>
<th>15%</th>
<th>6%</th>
<th>9%</th>
<th>35%</th>
<th>4%</th>
</tr>
</thead>
<tbody>
<tr>
<td>4%</td>
<td>10%</td>
<td>20%</td>
<td>17%</td>
<td>7%</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>E-government</th>
<th>1%</th>
<th>20%</th>
<th>15%</th>
<th>21%</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>44%</td>
<td>8%</td>
<td>15%</td>
<td>23%</td>
<td>10%</td>
<td>35%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

| Other                                 | 24%            | 12%     | 18%     | 24%         | 35%    | 9%     | 24%    |

| Do not know                           |                |         |         |             |        |        |        |

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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%

Don’t know

Would certainly not consider it

Would probably not consider it

Would probably consider it

Would certainly consider it

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

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

...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

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

...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)

% of high preparedness

Greater London
Germany
Netherlands
Norway
Russia
Sweden
Finland
Emotional perception of Estonia – how would people like to feel in Estonia?
Emotional perception of Estonia – how would people like to feel in Estonia?

How did we measure emotions?

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?

Characteristics of segments

How do I want to feel in Estonia?

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

6 emotional needs segments developed based on Jung’s model
Emotional perception of Estonia – how would people like to feel in Estonia?

% of those respondents, who have 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
- Ease
- Enjoyment
- Cheerfulness
In order to be successful in one’s actions and communication (product, brand or service), the strategy and communication must correspond to the target group’s emotional needs and values.

For example, when a person dares to accept new challenges, is combative, has a great need for achievement and following the crowd is not for them then they expect progressiveness, dynamism, innovation and flexibility from their brand. When a person is caring and kind, values security and stability then they primarily expect trustworthiness and feeling of security from the product or service provider – knowing that they are cared for and they can rely on the offerer.

To develop and maintain a successful brand and communication, one must know their target group’s needs, language; cultural peculiarities as well as symbolism and apply them consistently in each touchpoint.

The survey results presented on previous slides show that people from Finland and Sweden expect professionalism from Estonia as well as skill and knowledge of details, order and the feeling that everything is under control. At the same time, there is a need for cosiness, caring and naturalness. In any case, we are dealing with introvert emotional needs, which require a certain amount of reserve and discretion in communication.

The expectations of people from Germany, Holland as well as Moscow and St. Petersburg are similar but here the need for caring, cosiness, feeling of security and contentment is greater.

In general, it is possible to approach the inhabitants of Finland, Sweden, Germany and Holland rather uniformly with the Estonian brand communication – the needs are largely similar and this allows the use of a similar approach (emphasising differences with certain details and symbols).

But the people of Greater London require a different approach – here there is a need for more extrovert and individualistic emotions – approval, confidence, courage and standing out among others.

Inhabitants of Norway also need more extrovert emotions but here it is not individualism that is considered important but the feeling of belonging, friendliness, openness and warmth.
Description of segments and their meaning in marketing
Powerful

Unstoppable

Dynamic

Brave

Different from others

NO
RED: what kind of communication and marketing has an impact on them?

- Red is a very small segment (4%) BUT often not covered – weak offers and competition.

- Offered solutions should support the representative of the Red segment in his active life, allow to experience excitement, tension but not burden him at the same time, helping to make quick decisions and choices.

- It is difficult to maintain the loyalty of the Red segment representative - he is restless, an experimenter. He should not be under the impression that someone is trying to tie him down, put him in a box.

- The right style and tone of voice in communication and marketing. When communicating with the Red segment, one needs to be:
  - direct – bold and clear,
  - unusual – against the grain and offer a moment of surprise,
  - innovative – keeping up with the times or a step ahead.

- It is often thought that the Red segment must be offered something extreme BUT often it is just enough to be different from mainstream.

„Offer me bold solutions that are clear, flexible and exciting. Surprise me!“
RED: 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 – puts to the test, exotic, traditional.
- Money – constant circulation and deals, a game.
- Education – should disrupt the rest of the exiting life as little as possible, not the main thing.
- Telecommunications – speed is primary (fast internet) and so is simplicity (simple plans, non-binding contracts).
- Media – simple, fast, comprehensive (does not require delving deeper).
- Cars – maximum power and speed, adrenaline from driving.
- Fashion – creating a trend rather than following it, standing out among others.
- Sports – testing one’s physical abilities, testing one’s limits, adrenaline.
- Interior – unexpected, dramatic, striking, industrial.
PURPLE: what kind of communication and marketing has an impact on them?

- In relationships with brands, it is important how they help to satisfy the ambitions of the Purple segment’s representative.
- The offered solutions should make an impression, be visible and recognized.
- Expects competent communication but does not want any decisions to be made for him.

The right style and tone of voice in communication and marketing. When communicating with the Purple segment, one needs to be:

- a leader – show that you are a trailblazer, a leader by nature;
- confident – concentrate on your brand, not the competition; show who holds the reigns;
- responsive – take a wider look and keep your hand on the pulse;
- high quality – understand, what quality means to them and don’t compromise on that.

„Give me the means that help me be successful and get ahead of others!“
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** – stylish and distinctive, impressive.
- **Money** – success, money is power.
- **Education** – strong and wide basis, reputable.
- **Telecommunications** – the main thing is quality and the opportunity to compile one’s own plan.
- **Media** – rational, shows the big picture.
- **Cars** – combination of taste and top level technology, being in control of the car and the situation.
- **Fashion** – reputable, strong brands of high quality, imposing.
- **Sports** – winning and podium.
- **Interior** – spacious, impressive, with a hint of luxury.
BLUE

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 important for them to masters of themselves and 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!”
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

Peaceful

Caring

Gentle

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.
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.
ORANGE: what kind of communication and marketing has an impact on them?

- Thinking together and acting together is the key to his heart.
- Communication in service situations should be like a conversation with a good friend that also provides the opportunity to chat, in addition to practical advice. The offerer should be easy to communicate with, they must be close to people.
- Representatives of the orange group are open to loyalty programs and sales campaigns.

- The right style and tone of voice in communication and marketing. When communicating with the Orange segment, one needs to be:
  - inclusive – create the feeling that everyone is welcome;
  - simple and understandable – be direct and don’t come off as too smart;
  - direct and natural;
  - for everyone – no need for exclusivity and exceptionalism.
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 – common and simple; food that can be shared.
- Money – stability and consistency, money is responsibility.
- Education – humanities and student life.
- Telecommunications – simple and easy-to-use solutions.
- Media - entertaining.
- Cars – rational and simple; stress-free driving.
- Fashion – unpretentious, practical, casual.
- Sports – inclusive, team sports.
- Interior – warm, welcoming, simple.
YELLOW: what kind of communication and marketing has an impact on them?

- Everything needs to be simple, convenient and fast. Representatives of the Yellow segment are interested in all innovations but they also need to be simple and quickly applicable. Formality and delving into things extensively is not for them.
- They are open to offers and advertising and can go along with them easily. Discounts are very welcome.
- Service should beaming with optimism, be exciting and playful.

The right style and tone of voice in communication and marketing. When communicating with the Yellow segment, one needs to be:

- outstanding – make noise on the market and draw attention to yourself;
- youthful – be young at heart, don’t be burdened by the concerns of the grown-ups’ world;
- gripping – be exciting, charming, sexy;
- carefree – don’t be too serious; show that you are fun to be with.

“Give me fun and freedom!”
YELLOW: 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 – offers enjoyment, rewarding oneself.
- Money – money is freedom, the means for enjoyment.
- Education – should burden and limit as little as possible; student life and company of others is important.
- Telecommunication – fast and trendy solutions.
- Media – entertainment, tabloids.
- Cars – playful and fun, joy from driving.
- Fashion – follows trends, diverse, eye-catching.
- Sports – enjoying the moment, letting oneself go.
- Interior – creative, playful, bright.
For further explanations, contact...

Tanja Kriger
Kantar Emor, Research Expert
Tel: +372 626 8444
E-mail: tanja.kriger@emor.ee

Kantar Emor
Tel: +372 626 8500
Fax: +372 626 8501
E-mail: emor@emor.ee
Address: A. H. Tammsaare tee 47, 11316 Tallinn