

Summary for a Survey on Estonian Image in Japan

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April 2022



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1. Summary of Methodology

Background & Objectives:	<p>To target the proper segments of the Japanese consumers to promote Estonia, Embassy of Estonia decided to conduct a national survey to understand the Estonian image in Japan.</p> <p>Possibly targeting certain age groups, regions, gender, etc. and trying to figure out how many Japanese individuals have heard about Estonia and if yes, then what kind of aspects they have heard of - possibly as a tourism destination, a strong IT country, food, different industries, design, etc.</p>
Methodology:	Online survey
Area:	Nation-wide (national representative)
Respondents:	Males and females aged 18-69 who are aware of Estonia ※"Estonia Awarer" means those who at least know a little bit about what kind of country "Estonia" is
Sample size:	n=1000
LOI:	Approximately 12 minutes
Fieldwork dates:	March 4-7, 2022

Key Findings and Recommendations



Snowy Tallinn
Credit: Malle Koines

2. Key Findings and Recommendations - 1

Awareness of Estonia

- Awareness of Estonia among Japanese people is **9%**. These 9% became the targets of this survey and noted as “**Estonian Awarers**.” Among those 9% who are aware of Estonia, only 1 in 10 have any detailed knowledge. This means that, overall, less than 1% of Japanese have detailed knowledge about Estonia.
- Comparing the population distribution, more males than females and the younger the generation, know about Estonia.

Recall of Estonia

- When asked spontaneously for what the Estonian Awarers know about Estonia, **64%** mentioned about geography, vaguely knowing where it is. History/politics (24%), industry (17), and image (10%) are raised, but not enough to explain in detail.
- When aided with a list, Estonian Awarers also mentioned about geography that Estonia is known for being one of the three Baltic countries (77%), followed by being a former Soviet Union country (66%). Considering the fact that the respondents are Estonian Awarers, **33%** answered that Estonia is “the most advanced IT nation.” In other words, Estonia's great strengths are not yet fully conveyed to the Japanese.



Estonian flag Credit: Vaas / Transpordiamet



Tallinn Old Town Credit: Kaupo Kalda

2. Key Findings and Recommendations - 2

Image of Estonia

- Japanese have rather a positive image of Estonia.
- **Six out of ten** Estonian Awarers have positive impressions of Estonia using a 5-point scale question. A double-digit top box with 14% having “very good” impressions can be considered high, given the Japanese tend to score in the middle. Only **2%** of the Estonian Awarers have negative impression on Estonia. Vast majority of the rest most likely do not have enough knowledge to share their impressions on Estonia and gave “can’t say.” More females and the younger generation tend to have a positive impression.
- When shared a list of attributes explaining Estonia, many Estonian Awarers selected positive image (**86%**), with nearly half noting “beautiful nature” and “beautiful cityscape” , indicating that Estonia is a beautiful country. Conversely, **33%** selected negative image dominated by “cold” derived from the geographical environment.



Couple in front of large map Credit: Andri Peetso



Modern Tallinn Credit: Kaupo Kalda

2. Key Findings and Recommendations - 3

Intention to visit Estonia

- When asked for intention to visit Estonia in a 5-point scale question after the new coronavirus infection is under control, 7% of Estonian Awarers answered within a year, 18% within 3 years and **59%** including someday. With the weekly average cases of COVID being 65K+ during fieldwork, there may have been a skew towards “someday” among those who showed interest in visiting Estonia.
- Those who intend to visit tends to have positive image of Estonia. Among the 59% of the Estonian Awarers who intend to visit Estonia including those up to someday, their major reason for visit is to enjoy the beautiful city scenery (**63%**), get familiar with Estonian culture (**50%**), and experience the nature tourism (**47%**).
- Those who "know in detail" generally have a more positive image of Estonia and a higher intention to visit than those who "know a little." This indicates that the more familiar the Japanese people become with Estonia, more Japanese will have a better image and have a higher intention to visit the country.
- On the contrary, among the **41%** of Estonian Awarers who do not intend to visit Estonia, major reasons mentioned is that not much information is available in Japanese language (**32%**), followed by the access not being good (**26%**) and that they are not aware of tourist attractions in Estonia (**26%**). Lack of information and difficulty in access seem to be the major barriers.



View to the sea from Sorve lighthouse CP Creatives



Pärnu coastal meadow hiking trail Credit: Eiliki Pukk

2. Key Findings and Recommendations - 4

Recommendations

- The most important aspects of Estonia that should be focused on and promoted in order to improve the country's image and recognition are **tourism and gourmet food**. Japanese enjoy traveling and dining local gourmet foods that nearly 50% of respondents indicated an intention to experience each. In particular, not many respondents answered that "the food looks delicious" as they had no image of Estonian foods, indicating that there is much room for PR activities.
- Looking at the Japan's demographics, more males and the younger generation are aware of Estonia. However, females and the older generation have more disposable income and are much more positive when it comes to tourism and gourmet. **Targeting the females and the older generation** with larger population volume may be more effective even though their recognition rate is lower.
- Japanese consumers are looking for **more experience with Estonia through gourmet/cultural events, product exhibitions, and establishment of antenna shops**. Antenna shops are promotional shops introducing culture/industry, selling various foods/commodities, and operating restaurants of specific cities/prefectures/ countries/etc.
- Regarding the source of awareness of Estonia, traditional media such as television, newspapers, and magazines are the most frequently mentioned channels. However, due to large budget involved here, it would be much more effective to **utilize SNS** (Twitter, Youtube, etc.) and Internet sites, which are highly compatible **in promoting tourism and gourmet food**.



Berries Credit: Karl Ander Adami



Canoeing on Ahja river Credit: Katrin Laurson

2. Key Findings and Recommendations - 5

Recommendations

- Estonia being "the most advanced IT nation" has not been fully penetrated in Japan, yet. Given the Japanese government and companies being quite behind in IT or digitalizing, **active promoting of technology licensing or IT development programs** can be a gateway to opening new business opportunities in Japan.

Next Step

- Prior to conducting promotions to improve awareness and image in the future, we recommend testing the concepts of the promotional materials to evaluate the most effectiveness and to see what improvements should be made if any. (e.g., ad test/concept test/etc.)
- Post surveys are recommended to measure the effectiveness of the promotions and to track the awareness and image using the current survey as a benchmark.
- Current survey was targeted at the general consumers to understand the basic awareness and image of Estonia. However, in creating promotional materials, qualitative interviews among those who have experienced Estonia may provide more insightful information.



Kids at IT class Credit: Ministry of Education and Research - Aivo Kallas



Delivery robot Starship on a street Credit: Renee Altrov

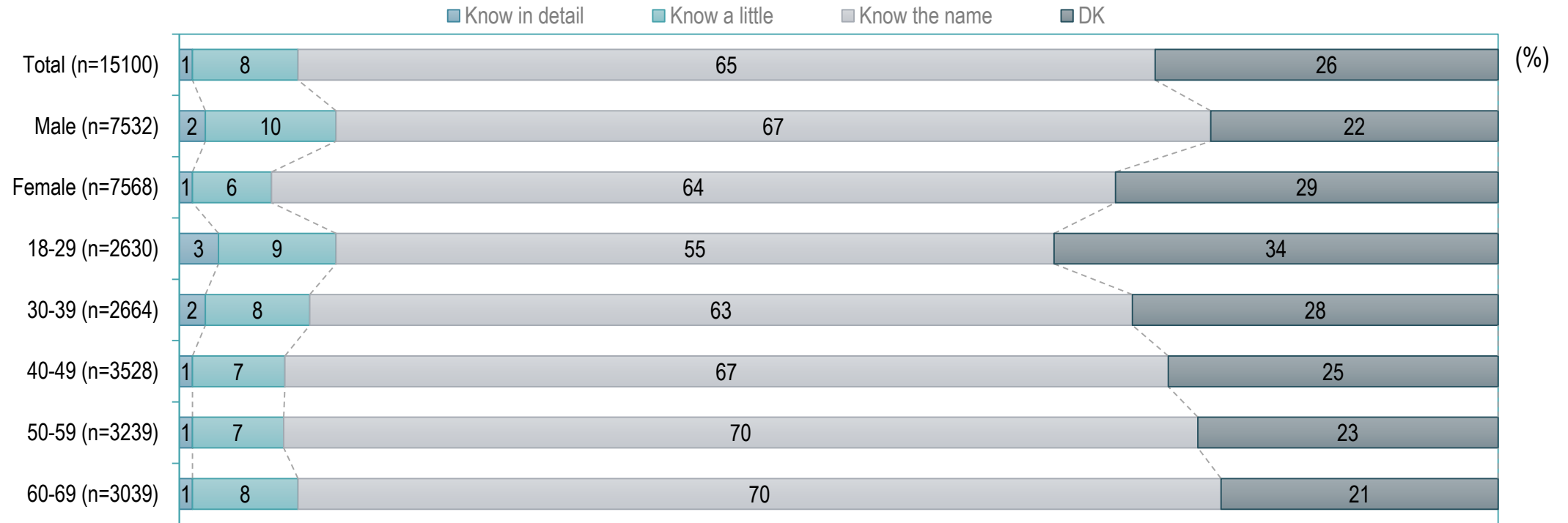
Main Findings



Heart shape lake
Credit: Priidu Saart

Awareness of Estonia

- Awareness of Estonia among the Japanese consumers is limited at 9%, whereby 1% know about Estonia in detail and 8% know a little about Estonia when asked using a 4-point scale question. These 9% became the targets of this survey and noted as “Estonian Awarers.” *Slightly more awareness can be seen among the males and the younger generation.*
- Nearly two thirds of the Japanese consumers only know the name of Estonia and just above a quarter knows nothing.



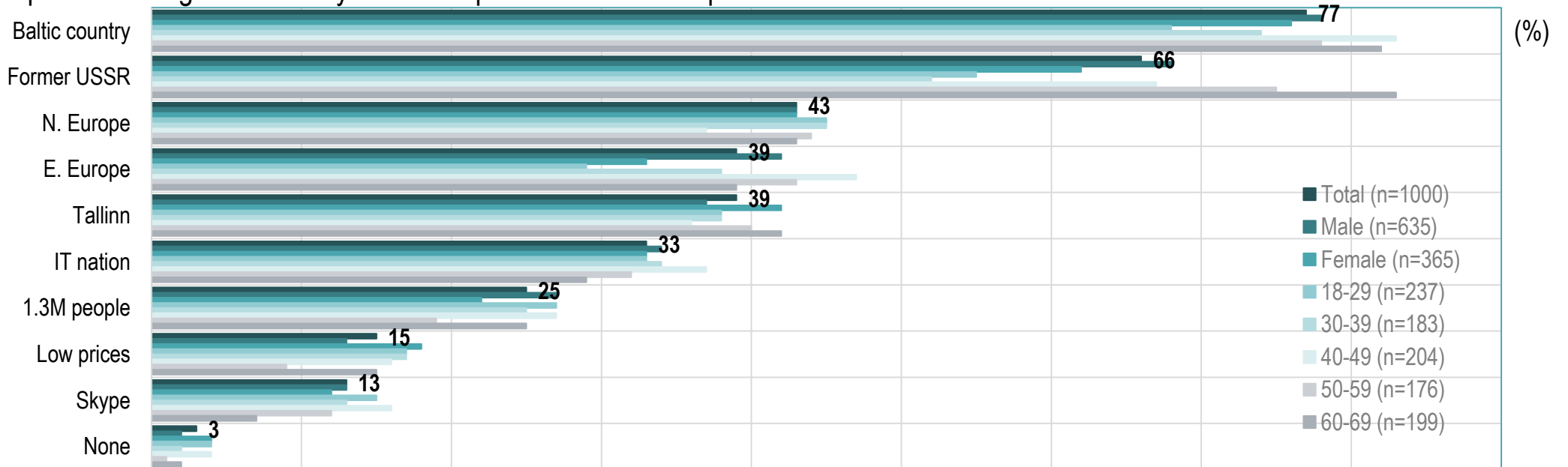
Unaided awareness of Estonia

- When asked for what the Estonian Awarers know about Estonia unaided, two thirds mentioned about geography, followed by history/politics, and industry. Being one of the three Baltic countries is mentioned most at 44%, being a former Soviet Union country at 19% and that Estonia is an advanced country in IT at 12%. Awareness seems to differ by age.

	Gender			Age					Awareness of Estonia		Intent to visit Estonia		Change in knowledge about Estonia in P5Y		Foreign languages speak	
	Total	Male	Female	18-29	30-39	40-49	50-59	60-69	Know in detail	Know a little bit	Will visit	Will not visit	Increased	CS / Decreased	Speaker	Non-speaker
Base:	1000	635	365	237	183	204	176	199	130	870	590	410	296	704	473	527
Geography Net (small country/many islands/cold climate/Latvian neighbor/Ferry from Finland)	64%	62%	68%	57%	61%	65%	69%	72%	50%	67%	62%	67%	60%	66%	65%	64%
Baltic country	44%	43%	44%	38%	38%	47%	44%	51%	31%	46%	44%	43%	38%	46%	43%	44%
Tallinn	9%	8%	12%	6%	12%	8%	8%	12%	12%	9%	12%	5%	12%	8%	12%	6%
N. Europe	6%	5%	10%	7%	6%	4%	8%	8%	7%	6%	6%	7%	7%	6%	7%	6%
By Baltic Sea	5%	5%	5%	2%	4%	5%	5%	9%	2%	5%	4%	6%	3%	6%	4%	6%
Russian neighbor	4%	3%	5%	3%	4%	2%	4%	4%	3%	4%	2%	5%	4%	3%	3%	4%
European country	3%	4%	3%	4%	3%	2%	2%	4%	0%	4%	2%	5%	3%	4%	2%	4%
Finnish neighbor	3%	2%	4%	3%	1%	3%	1%	5%	2%	3%	3%	1%	3%	3%	3%	2%
E. Europe	2%	2%	2%	1%	1%	3%	4%	0%	2%	2%	2%	1%	1%	2%	2%	1%
History/Politics Net (long history/Russian threat)	24%	25%	23%	17%	14%	22%	29%	39%	23%	24%	24%	24%	23%	25%	24%	24%
Former USSR	19%	19%	19%	14%	10%	17%	22%	32%	18%	19%	19%	19%	18%	19%	19%	19%
NATO member	3%	4%	1%	1%	3%	3%	5%	4%	4%	3%	3%	3%	2%	3%	4%	3%
Republic/Democracy	2%	2%	1%	2%	1%	1%	3%	2%	5%	1%	2%	1%	3%	1%	3%	1%
EU member	2%	2%	1%	1%	1%	2%	3%	1%	2%	1%	1%	2%	1%	2%	2%	1%
Industry Net (Skype/good for tourism)	17%	14%	20%	13%	21%	19%	16%	14%	17%	17%	20%	12%	24%	14%	21%	13%
Advanced in IT	12%	11%	14%	10%	16%	14%	8%	11%	14%	11%	14%	9%	17%	10%	15%	9%
e-Government	2%	2%	0%	2%	1%	1%	3%	0%	1%	2%	2%	0%	3%	1%	2%	1%
Image Net (beautiful nature)	10%	7%	15%	6%	13%	13%	8%	12%	13%	10%	13%	5%	18%	7%	11%	9%
Beautiful city scenery	6%	4%	9%	3%	8%	9%	2%	6%	9%	5%	8%	3%	11%	3%	7%	4%
Many beautiful women	2%	2%	2%	0%	3%	1%	3%	2%	1%	2%	2%	1%	2%	2%	1%	2%
Food Net (Sült/good food)	4%	3%	6%	6%	5%	4%	3%	2%	8%	3%	5%	2%	5%	3%	5%	4%
Culture Net (world heritage/distinctive flag)	4%	3%	6%	5%	3%	4%	3%	4%	7%	4%	5%	3%	7%	3%	6%	3%
People Net	4%	4%	3%	4%	3%	6%	3%	3%	5%	4%	4%	4%	5%	3%	4%	4%
Birthplace of Baruto	3%	4%	3%	3%	3%	5%	2%	2%	3%	3%	3%	3%	4%	3%	3%	4%
None	10%	12%	8%	17%	11%	11%	7%	5%	17%	9%	10%	11%	10%	10%	9%	11%

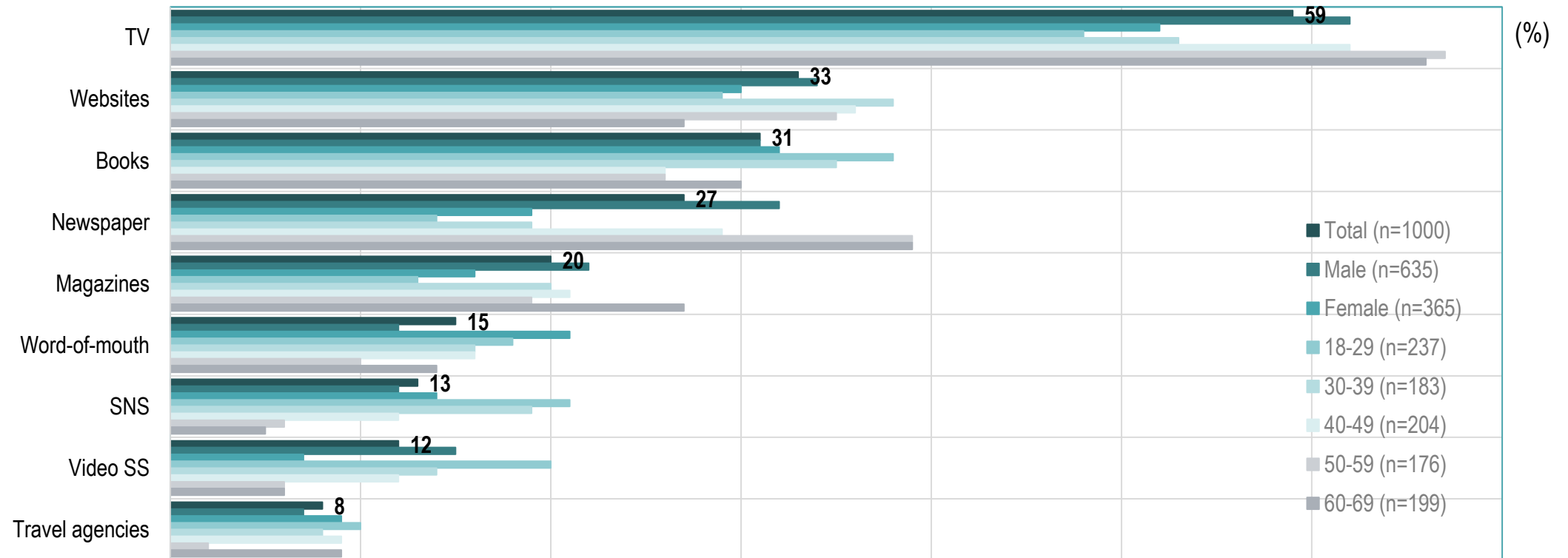
Aided awareness of Estonia

- When aided with a list, Estonia Awarers mentioned that Estonia is known for being one of the three Baltic countries, followed by being a former Soviet Union country. **Differences can be observed between gender and age.**
- Geographically, as many as 39% believe that Estonia is located in Eastern Europe, while 43% recalls it correctly being located in Northern Europe. 39% are aware of Tallinn being its capital.
- A third of the Estonian Awarers know that Estonia is the most advanced IT nation. Yet, only 13% know that Skype was developed in Estonia.
- A quarter of the Estonian Awarers know that Estonia is a small country with only about 1.3 million people. Furthermore, 15% are aware that the prices of living are relatively lower compared to other European countries.



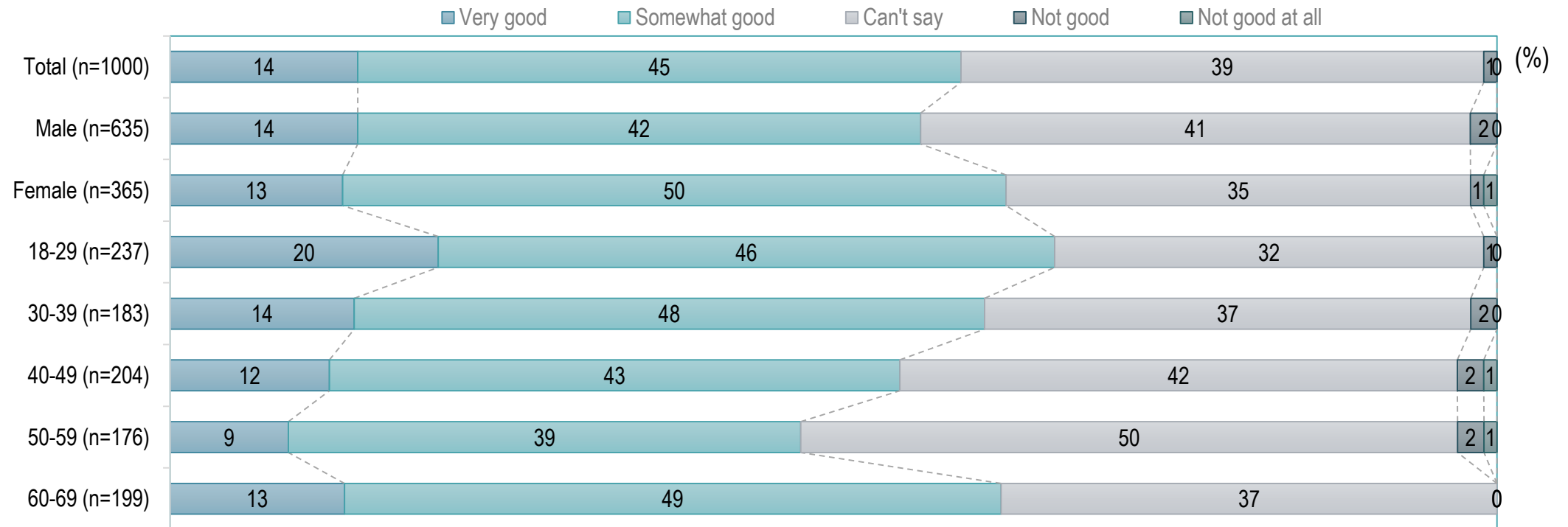
Source of awareness

- TV is the major source of information among the Estonian Awarers, followed by websites, books and newspapers.
- A big change in media can be expected shortly based on the trend of searching via SNS (Instagram/TikTok/etc.) and Video streaming services, especially so among the younger generation and females.
- Depending on the media, differences can be observed between gender and age.



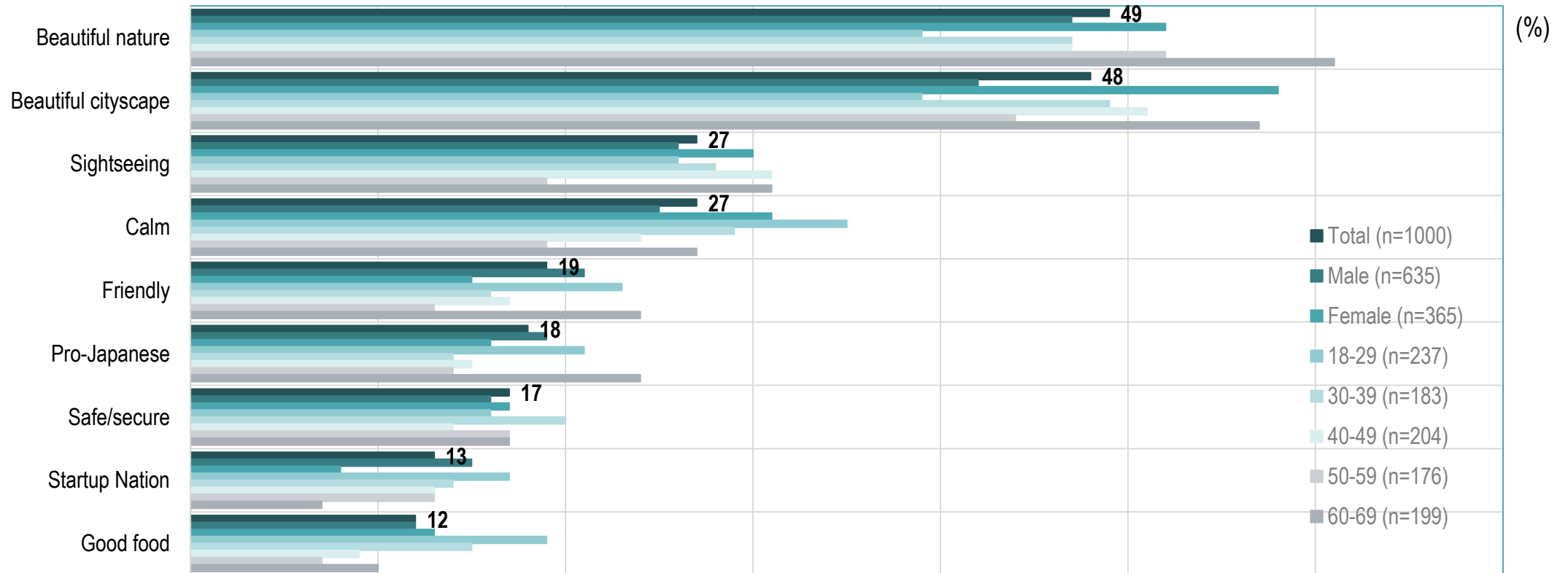
Impression of Estonia

- Six out of ten Estonian Awarers have positive impressions of Estonia using a 5-point scale question. A double-digit top box with 14% having “very good” impressions can be considered high, given the Japanese tend to score in the middle.
- Vast majority of the rest most likely do not have enough knowledge to share their impressions on Estonia and gave “can’t say.” 2% of the Estonian Awarers has negative impression on Estonia.



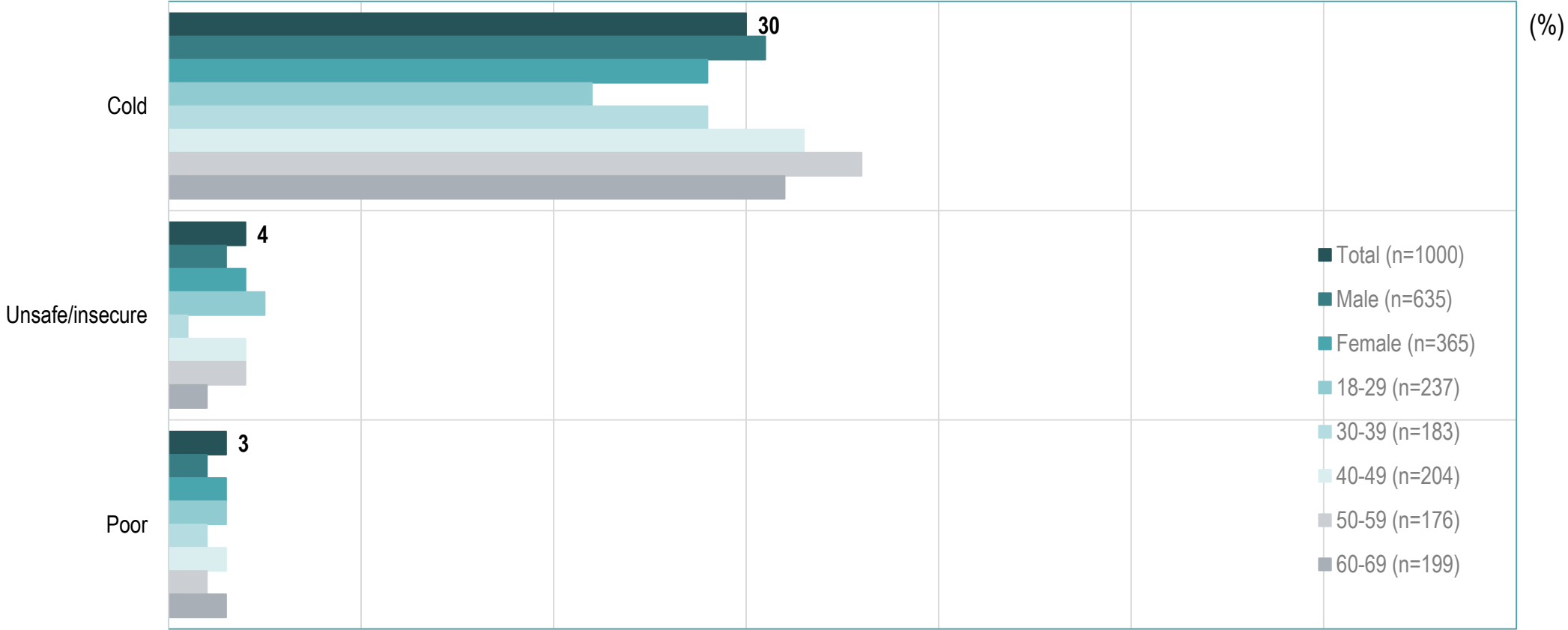
Aided image of Estonia – Positive (86%)

- When shared a list of attributes explaining Estonia, nearly half of the Estonian Awarers noted “beautiful nature” and “beautiful cityscape” for suiting its image, followed by “good for sightseeing” and “calm.” **Image seemed to differ by segments.**
- Nearly one out of five noted being “friendly,” “pro-Japanese,” and the country being “safe and secure.” Only 13% has an image of being a “startup nation” and 12% for having a “good food.”



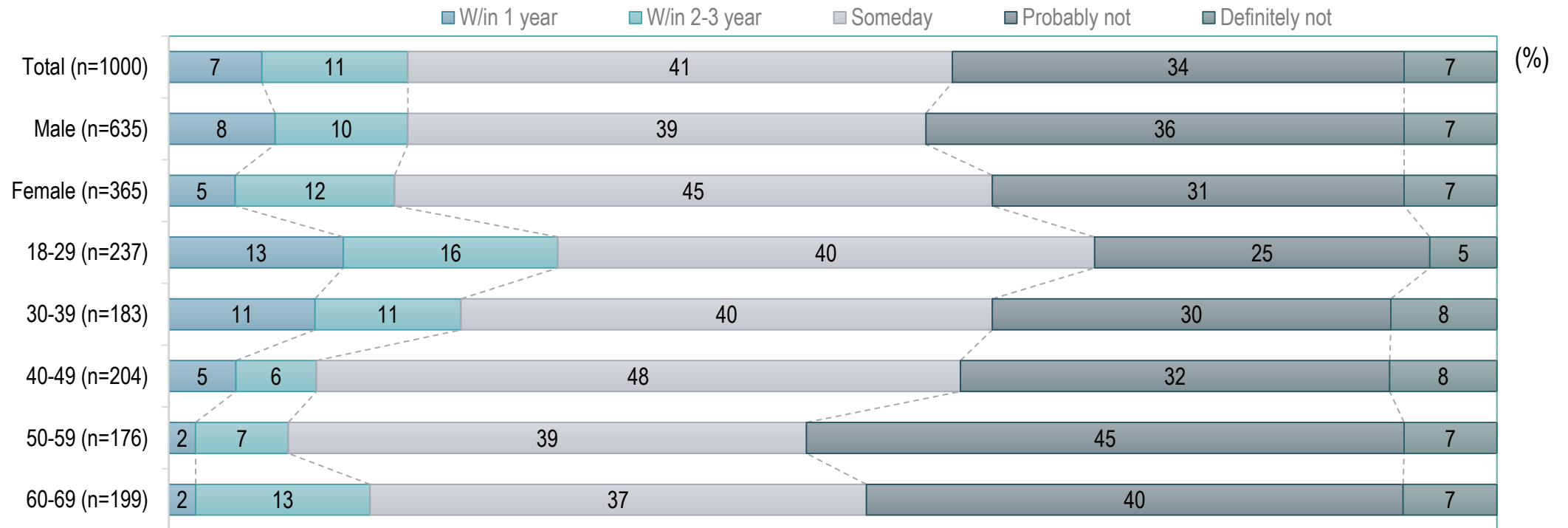
Aided image of Estonia – Negative (33%)

- Given the location of the country, Estonia is viewed as being “cold” by 30% of the Estonian Awarers.
- Hardly any negative images of being “unsafe/insecure” and “poor.”



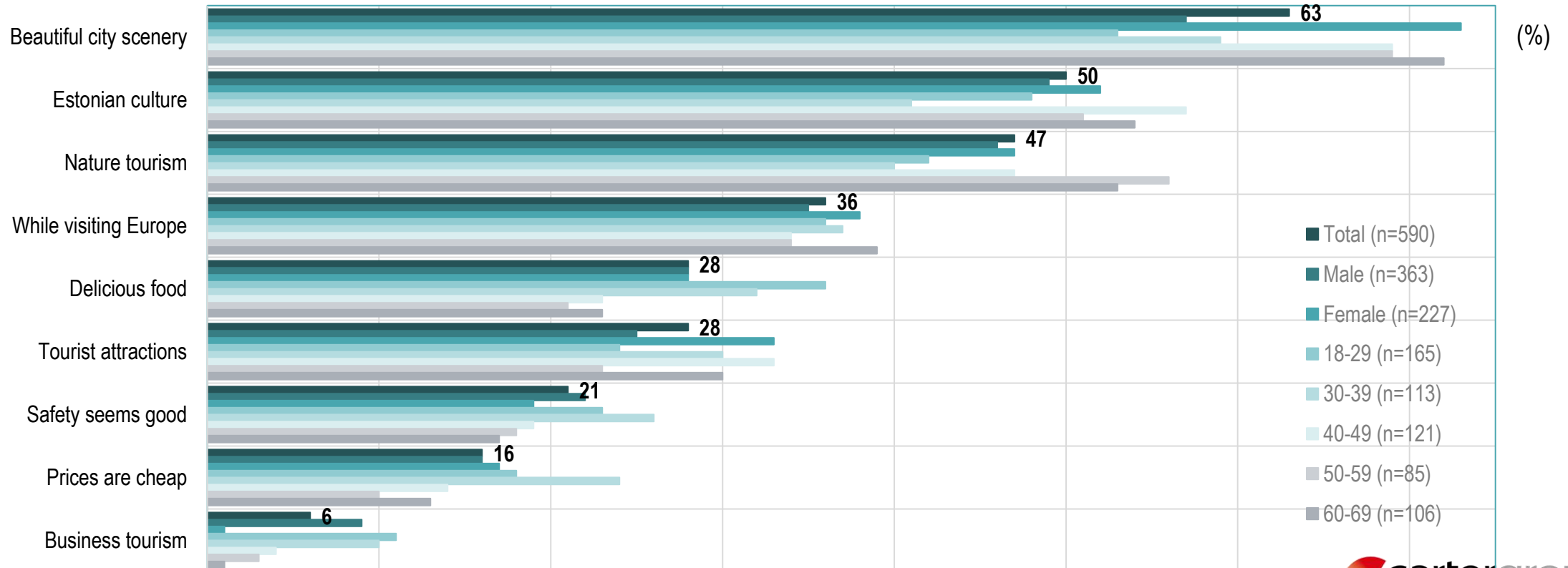
Intention to visit

- When asked for intention to visit Estonia in a 5-point scale question after the new coronavirus infection is under control, 7% of Estonian Awarers answered within a year, 18% within 3 years and 59% including someday. With the weekly average cases of COVID being 65K+ during fieldwork, there may have been a skew towards “someday” among those who showed interest in visiting Estonia.
- 41% of Estonian Awarers did not show interest in visiting Estonia.



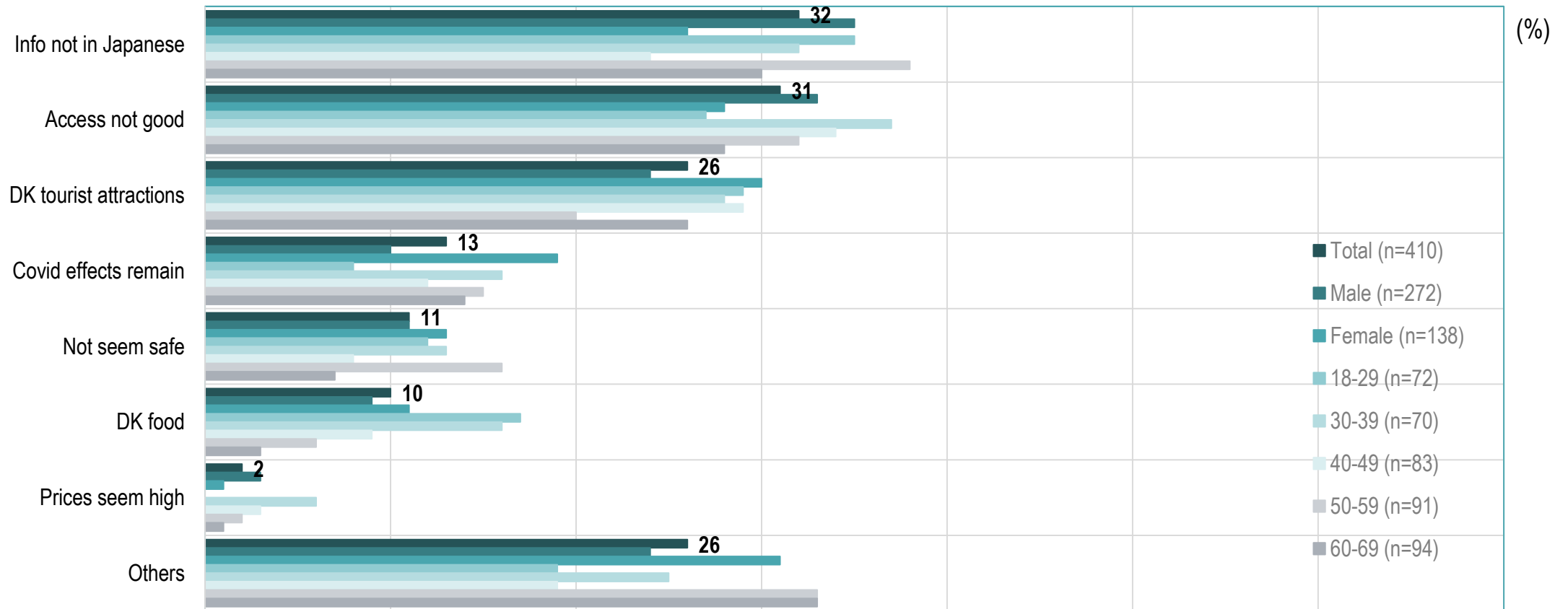
Reasons for wanting to visit

- Among the 59% of the Estonian Awarers who intend to visit Estonia including those up to someday, their major reason for visit is to enjoy the beautiful city scenery, get familiar with Estonian culture and experience the nature tourism. **Reasons for wanting to visit differ by gender and age.**
- Some intend to visit Estonia when they visit other European countries, taste the delicious looking foods, and visit many of their tourist attractions.
- Although not many, 6% mentioned of possibility for business tourism.



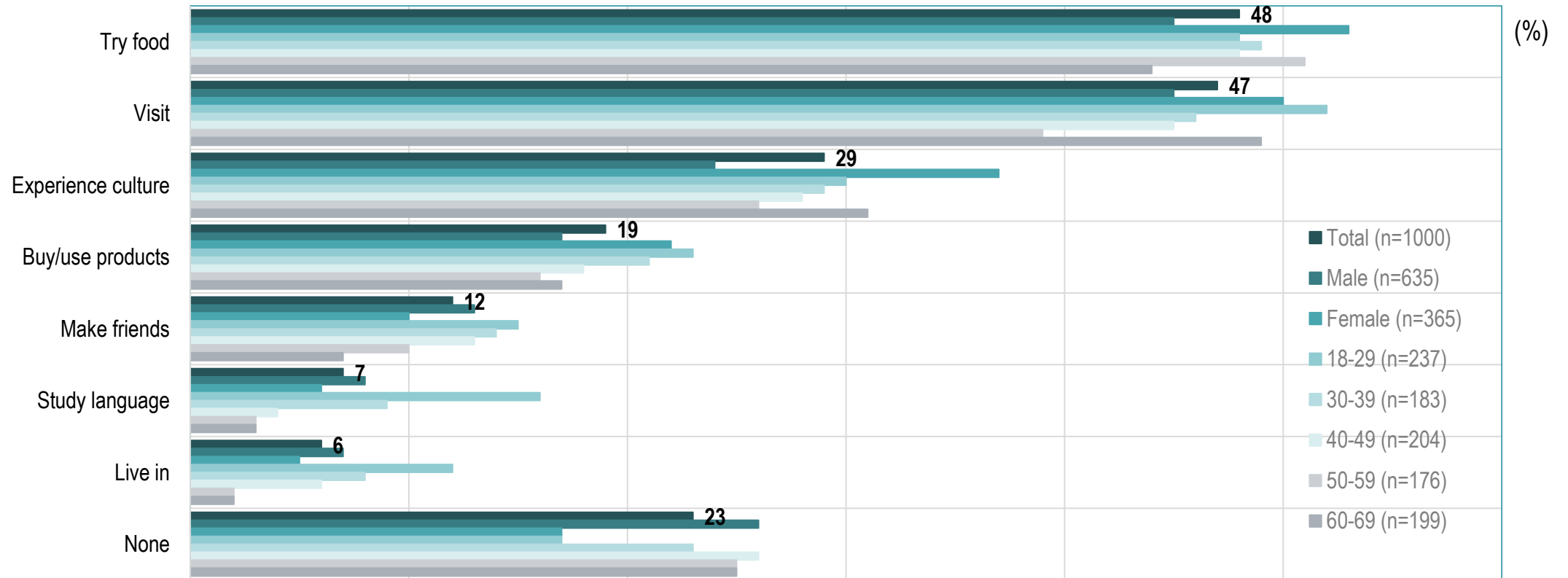
Reasons for not wanting to visit

- Among the 41% of Estonian Awarers who do not intend to visit Estonia, major reasons mentioned is that not much information is available in Japanese language, followed by the access not being good and that they are not aware of tourist attractions in Estonia.
- Differences can be observed by gender and age.



Intention to experience in Estonia

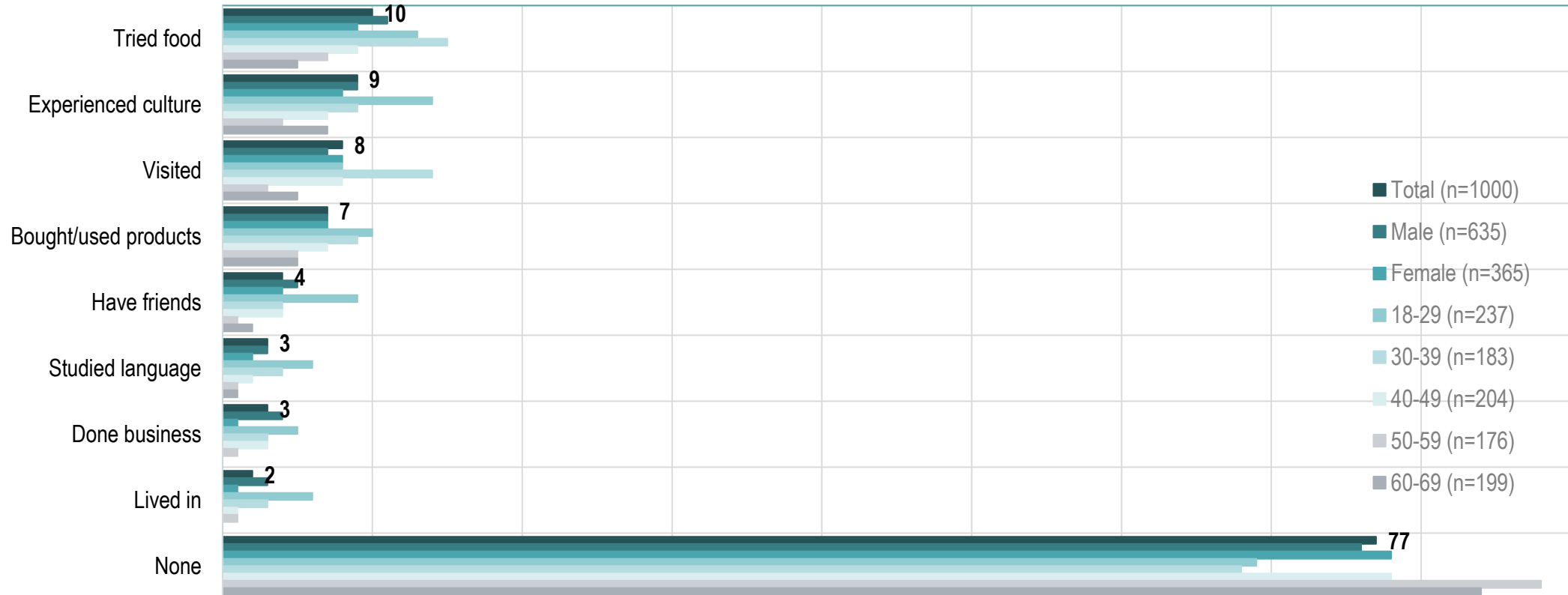
- When asked what Estonian Awarers would like to experience about Estonia in the future, nearly half mentioned that they would like to try Estonian foods and visit Estonia.
- Estonian Awarers would also like to experience the Estonian culture as well as buy and use Estonian products.
- Those who do not intend to experience anything in Estonia are basically those who do not intend to visit.



Have experienced in/with Estonia

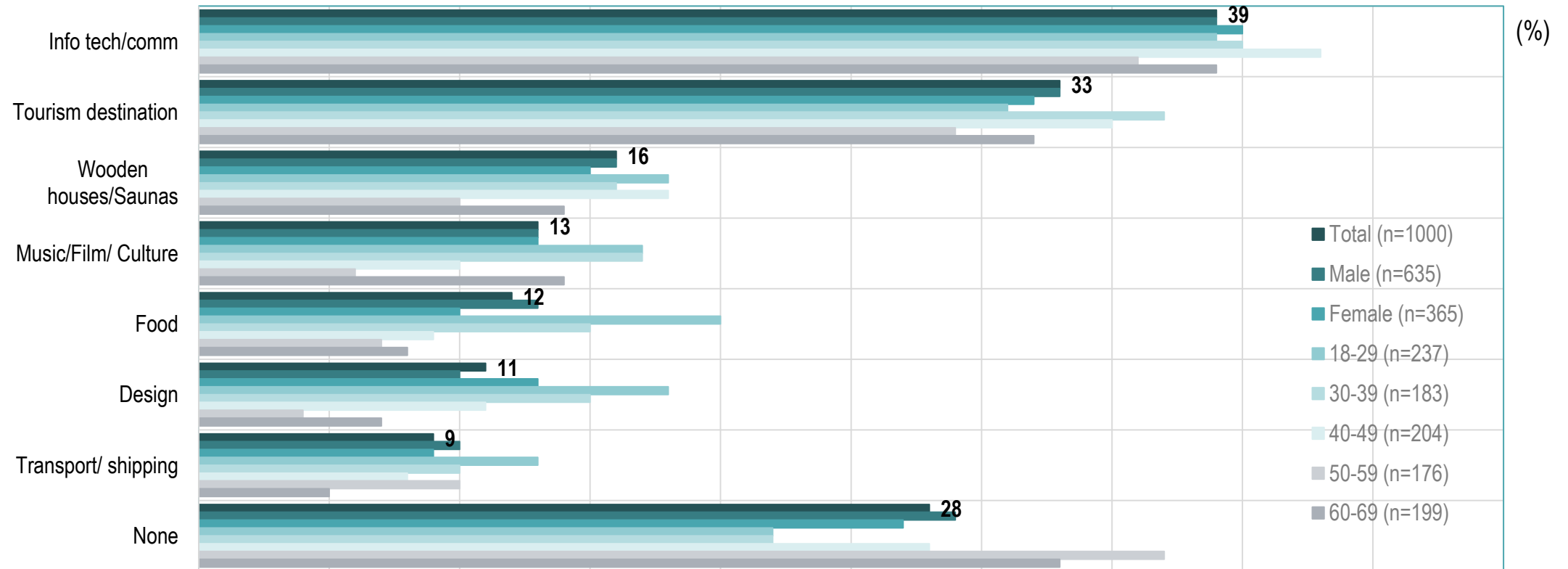
- More than three out of ten Estonian Awarers have experienced Estonia in some way based on a list shown. 10% has tried Estonian foods, 9% has experienced Estonian culture, 8% has visited Estonia and 7% has bought or used Estonian products. **Difference in segments can be seen depending on the activities experienced.**
- On the other hand, nearly seven out of ten have never experienced Estonia.

(%)



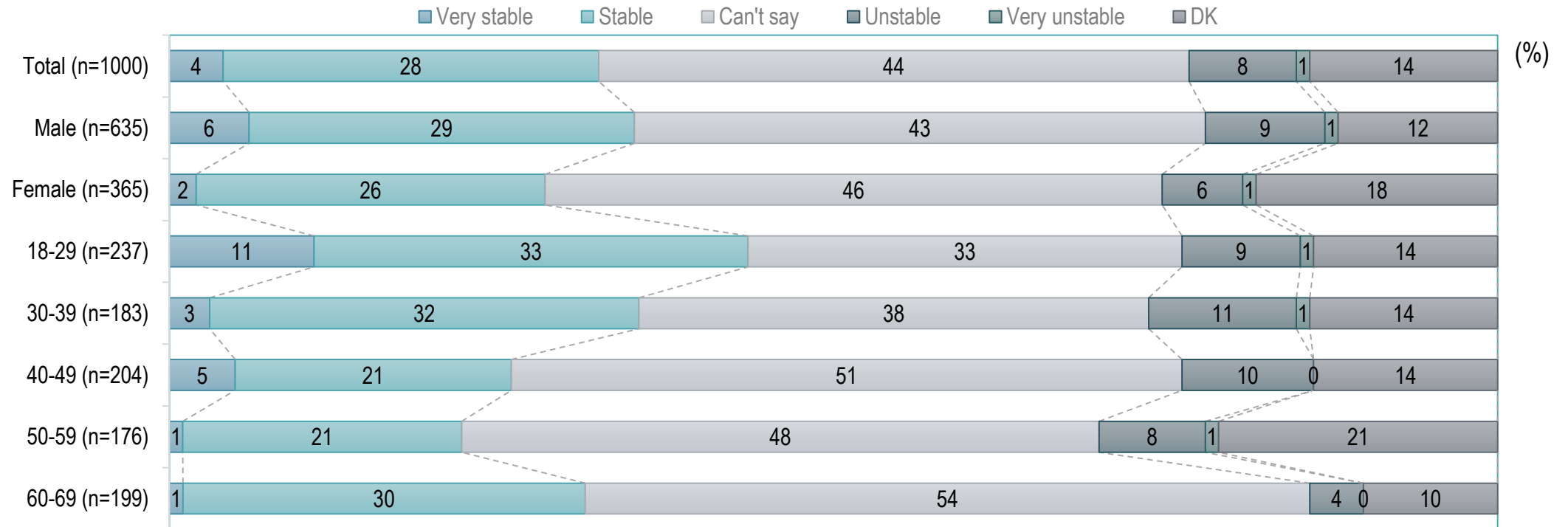
Industries that come to mind

- When Estonian Awarers were asked to recall industries that resonated with Estonia using a list, nearly 70% answered some industry starting with information technology and communication at 39%, followed by tourism destination at 33%. **Difference can be observed between segments.**
- Other industries mentioned less often are wooden houses/saunas at 16%, music/film/culture at 13%, food at 12%, design at 11% and transport/shipping at 9%.



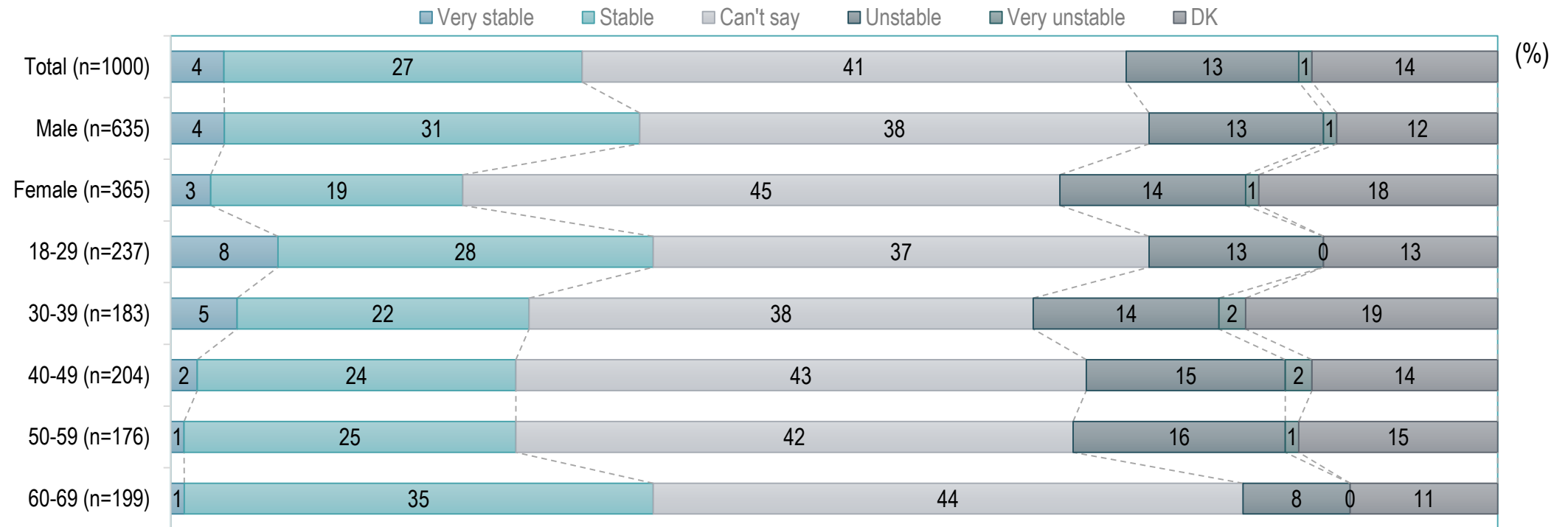
Business climate in Estonia

- When asked for opinion on the business climate in Estonia using a 5-point scale, 32% of Estonian Awarers answered positive, 9% negative, 44% neutral and 14% don't know. **Significantly more of those aged 18-29 compared to other age groups think the business climate in Estonia is very stable.**



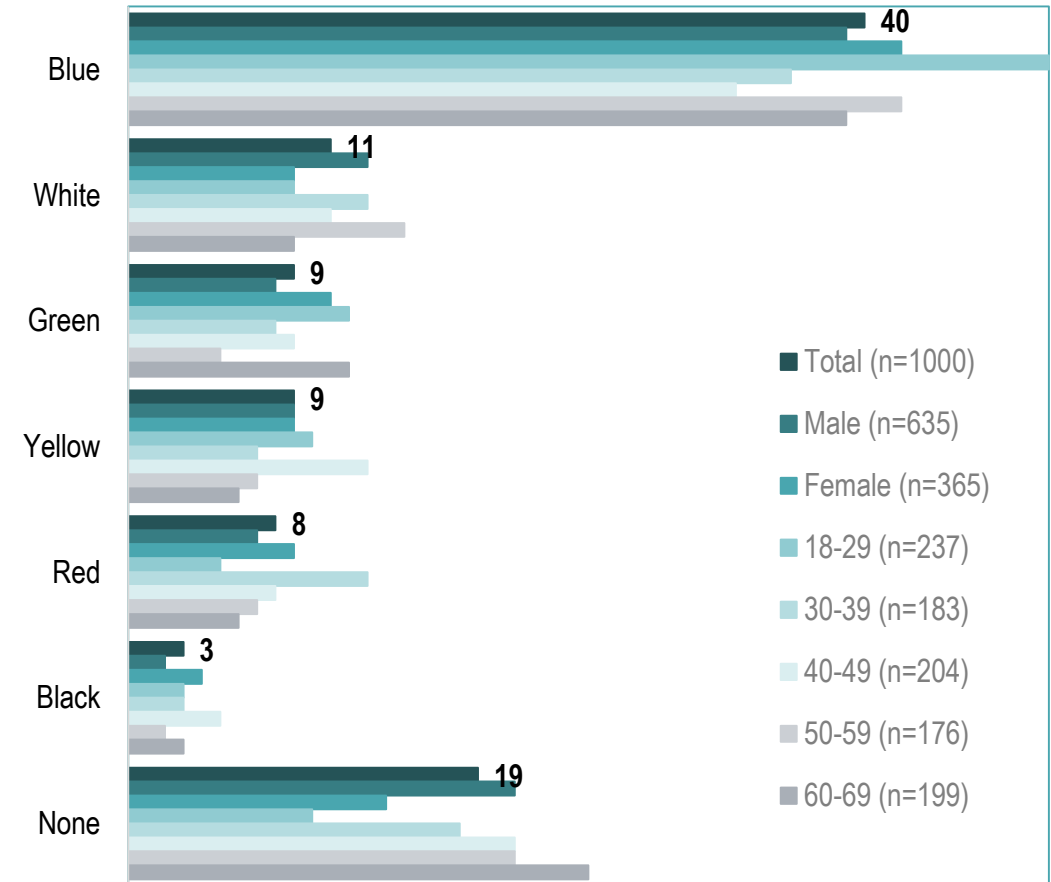
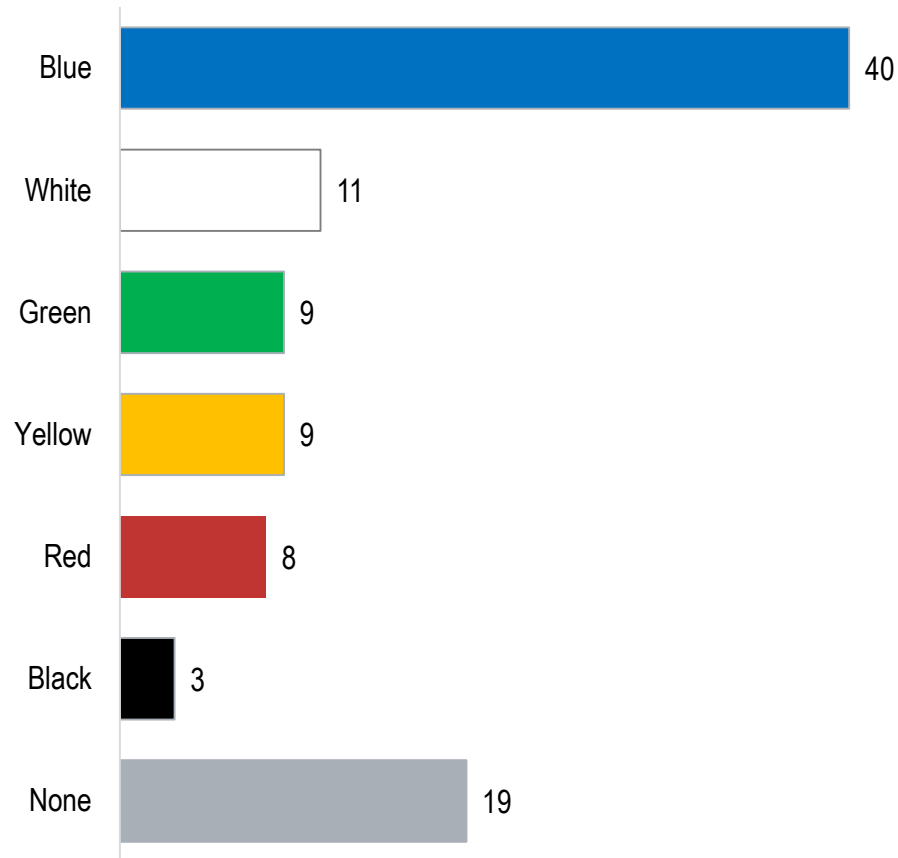
Political climate in Estonia

- When asked for opinion on the political climate in Estonia using a 5-point scale, similar trend to the business climate can be observed at 31% of Estonian Awarers answered positive, 14% negative, 41% neutral and 14% don't know.



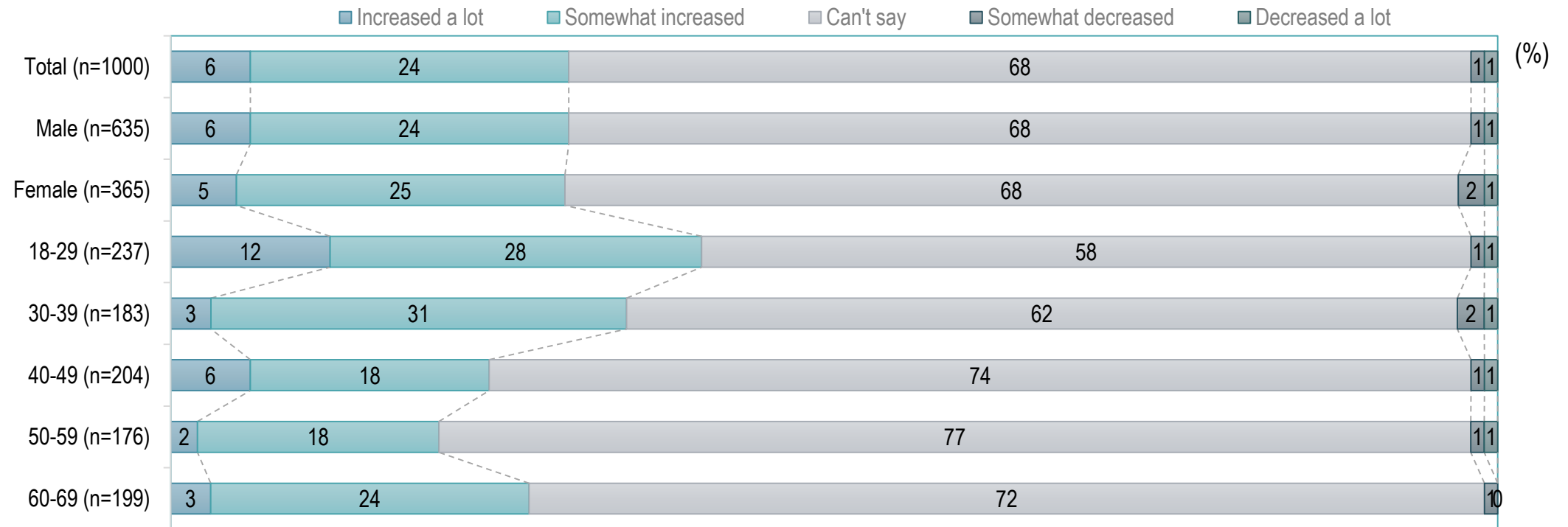
Color associated with Estonia

- When asked for a color that best associates with Estonia from a list, 40% gave blue, most likely coming from its national flag. Nearly one out of five could not associate any color. **Difference can be observed between segments.**



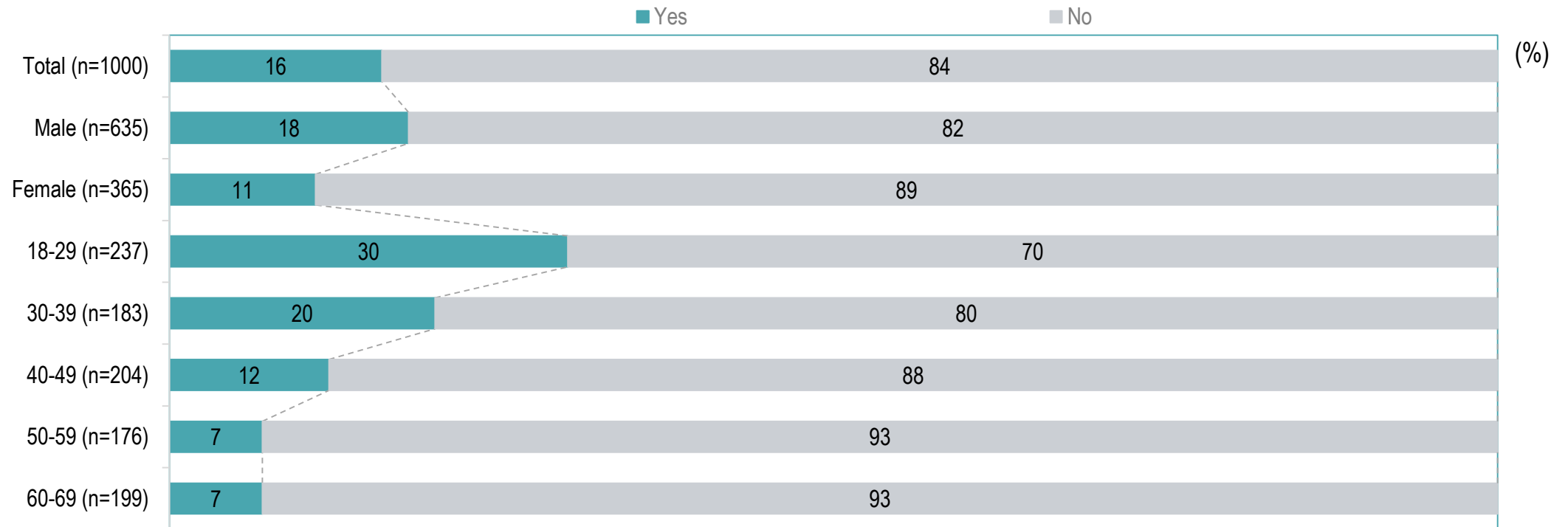
Change in knowledge about Estonia in 5 years

- When asked for opinion on the changes in knowledge about Estonia in the past five years using a 5-point scale, two thirds of Estonian Awarers can't say either their knowledge increased or decreased. Changes are felt among 30% positively and 2% negatively. **Significantly more of those aged 18-29 compared to other age groups think that their knowledge increased in the past 5 years.**



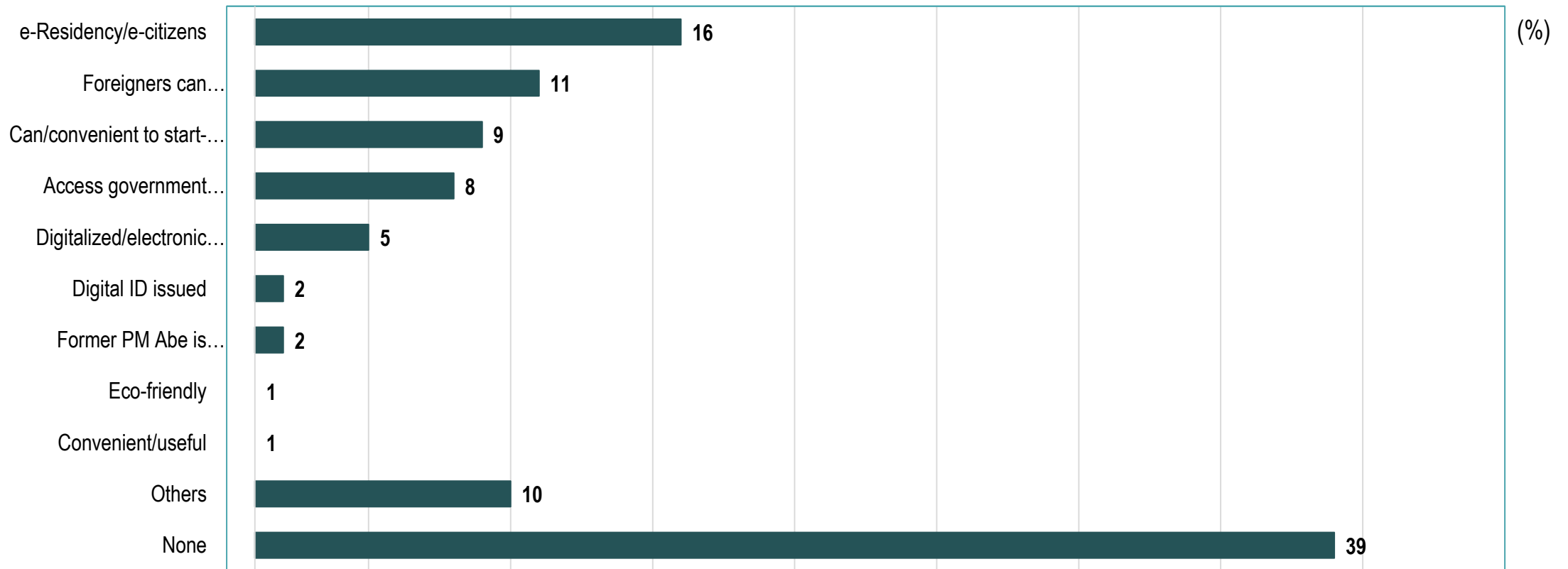
Awareness of “e-Residency”

- When asked whether Estonian Awarers ever heard of “e-Residency,” 16% answered that they have heard of it. Awareness is higher among males and the younger respondents.



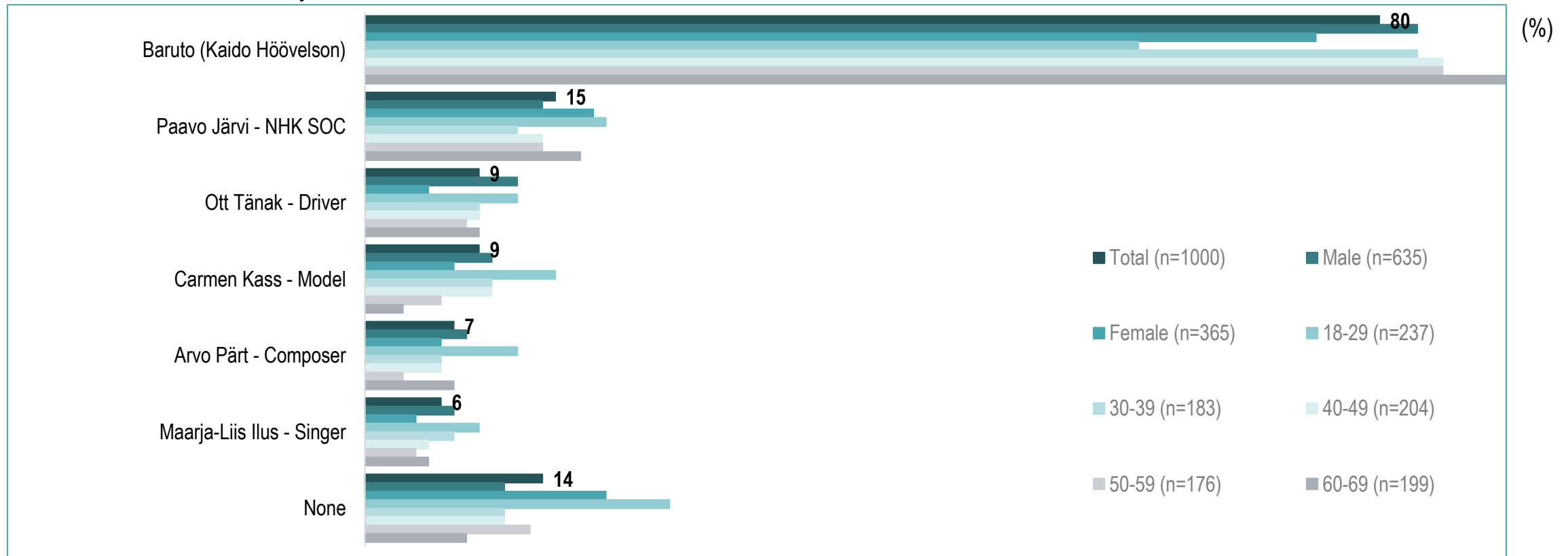
Recall of “e-Residency”

- When asked for what specifically is known about “e-Residency” to the 16% of Estonian Awarers that have ever heard of “e-Residency,” 16% mentioned that people can become residents in Estonia digitally (*denshi kokumin*). 11% noted that foreigners can register as well.
- Convenience in starting-up business (9%) and being able to access government services digitally (8%) are also mentioned. However, nearly 40% did not mention anything in detail.



Aided awareness of Estonians

- When asked for awareness of Estonians with photos, names and brief descriptions, Baruto is known by 80% of Estonian Awarers, more so among the males and the older generation.
- There is a big gap between the most and the second most popular Estonian being Paavo Järvi –a conductor of NHK Symphony Orchestra at 15%.
- 14% did not know of any Estonian shown.



Estonia To Do (1)

- When asked for suggestions to make Estonia a more accessible country to Estonian Awarers, major comment is to provide more information on Estonia in Japanese. By information, Estonian Awarers are looking for information on sightseeing, general, foods, culture, products, and being the leading IT country. They are looking for information on TV programs, any media, SNS, commercials and posts by Estonian celebrities.
- Other suggestions include economical/cultural exchange programs, and various events/campaigns related to foods, culture, and tourism.

See Table on the following page



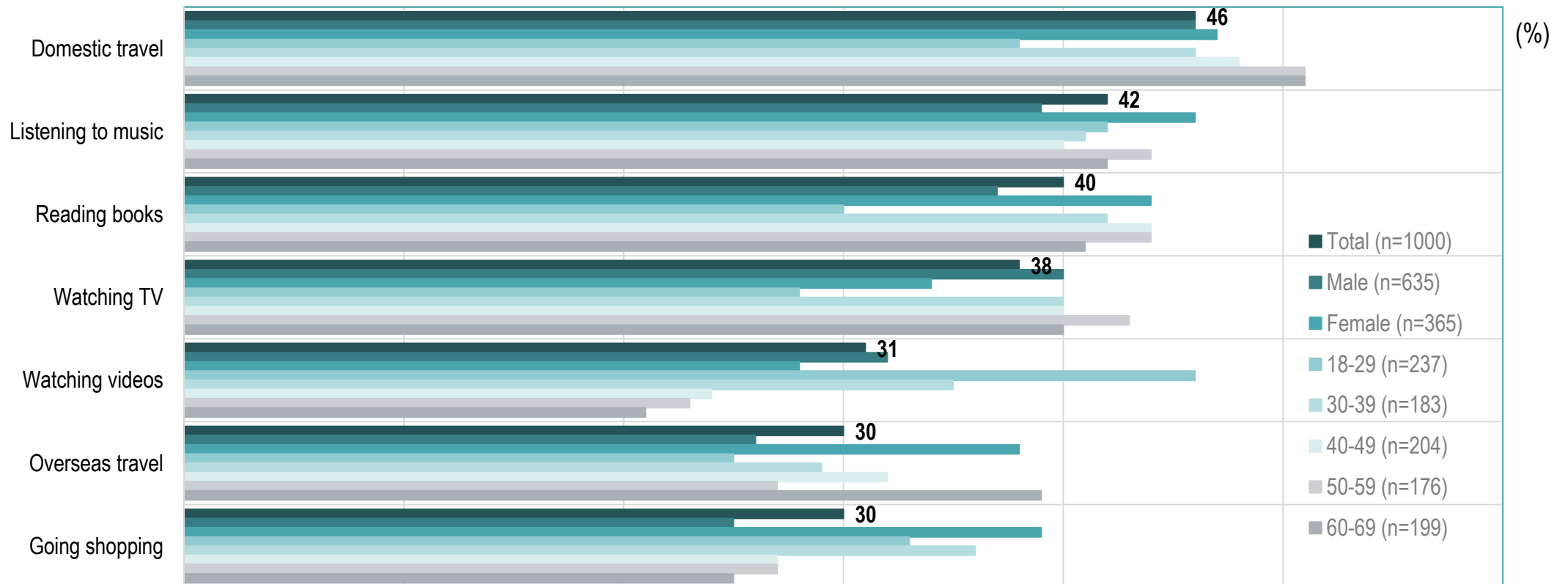
Estonia To Do (2)

	Gender			Age					Awareness of Estonia		Intent to visit Estonia		Change in knowledge about Estonia in P5Y		Foreign languages speak	
	Total	Male	Female	18-29	30-39	40-49	50-59	60-69	Know in detail	Know a little bit	Will visit	Will not visit	Increased	CS / Decreased	Speaker	Non-speaker
Base:	1000	635	365	237	183	204	176	199	130	870	590	410	296	704	473	527
Contents Net (Promote a pro-Japanese image/Promote as Baltic States)	33%	31%	35%	28%	29%	40%	31%	35%	28%	33%	32%	33%	33%	32%	39%	27%
Provide info on sightseeing (Just) more info/promotion	11%	9%	15%	7%	7%	13%	14%	14%	5%	12%	11%	10%	13%	10%	13%	8%
Provide info on gourmet food	8%	9%	8%	5%	9%	10%	9%	8%	7%	9%	8%	9%	7%	9%	8%	8%
Provide info on culture/arts	7%	7%	8%	9%	9%	10%	5%	3%	5%	8%	6%	9%	7%	7%	8%	7%
Provide info on Estonian products	4%	4%	4%	5%	2%	4%	3%	5%	7%	3%	5%	2%	5%	3%	5%	3%
Promote as leading IT country/supply technology	2%	1%	3%	1%	2%	1%	1%	3%	1%	2%	1%	3%	1%	2%	2%	2%
Media Net (Have celebrities/influencers post/Post on YouTube/Twitter/Internet)	21%	18%	26%	18%	26%	23%	25%	15%	16%	22%	23%	19%	24%	20%	22%	21%
Introduce on TV programs	9%	6%	15%	8%	12%	10%	10%	8%	5%	10%	10%	9%	9%	9%	8%	10%
Post info via media	3%	4%	3%	2%	3%	3%	8%	2%	2%	4%	4%	3%	3%	4%	3%	4%
Post info on SNS	2%	2%	3%	4%	5%	2%	1%	0%	1%	3%	3%	1%	4%	2%	3%	2%
Run CM (TV/internet)	2%	2%	2%	0%	3%	2%	4%	2%	4%	2%	2%	2%	1%	3%	2%	2%
Have Estonian celebrity post	2%	2%	3%	1%	3%	3%	2%	2%	2%	2%	2%	2%	2%	2%	2%	3%
Post info in newspapers, magazines, books	2%	1%	3%	1%	2%	1%	1%	2%	1%	2%	1%	2%	2%	1%	2%	1%
Policy-related Net (Improve security/Study abroad programs/Economic ties/Sister city/Sports exchange/Cultural exchange)	17%	18%	14%	12%	21%	16%	17%	19%	18%	16%	18%	14%	21%	15%	17%	16%
Increase exchanges with Japan	3%	4%	2%	3%	3%	3%	3%	4%	3%	3%	4%	3%	4%	3%	4%	3%
Increase imports of food/commodities/sundries	2%	2%	3%	3%	4%	1%	2%	1%	4%	2%	3%	1%	4%	1%	2%	3%
Disclose anti-Russian attitude/support Ukraine	2%	2%	2%	0%	1%	1%	6%	4%	4%	2%	2%	3%	2%	2%	3%	2%
Establish direct flights/improve accessibility	2%	2%	2%	1%	4%	3%	2%	2%	1%	2%	3%	0%	3%	2%	3%	1%
Event/Campaign Net (Antenna shop)	10%	9%	12%	9%	7%	11%	11%	13%	12%	10%	13%	7%	11%	10%	11%	10%
Gourmet event/product exhibition	3%	2%	5%	2%	2%	4%	3%	3%	4%	3%	3%	2%	2%	3%	3%	3%
Cultural or artistic event/campaign	2%	1%	3%	1%	2%	1%	3%	2%	3%	2%	2%	1%	3%	1%	3%	1%
(Simply) organize event/campaign	2%	2%	1%	1%	0%	3%	2%	1%	2%	1%	2%	1%	2%	2%	2%	1%
Tourism event/campaign	2%	2%	2%	1%	0%	1%	2%	4%	1%	2%	2%	1%	1%	2%	1%	2%
Increase travel tours	2%	1%	2%	1%	2%	2%	1%	2%	2%	2%	2%	1%	1%	2%	2%	1%
Create Estonian restaurant	2%	1%	2%	2%	3%	1%	1%	1%	2%	1%	2%	1%	2%	1%	1%	2%
None	27%	29%	23%	36%	24%	20%	24%	27%	35%	25%	23%	32%	20%	29%	23%	30%

Awarers, n=1000 (Mentions in parenthesis are 1% of Total)

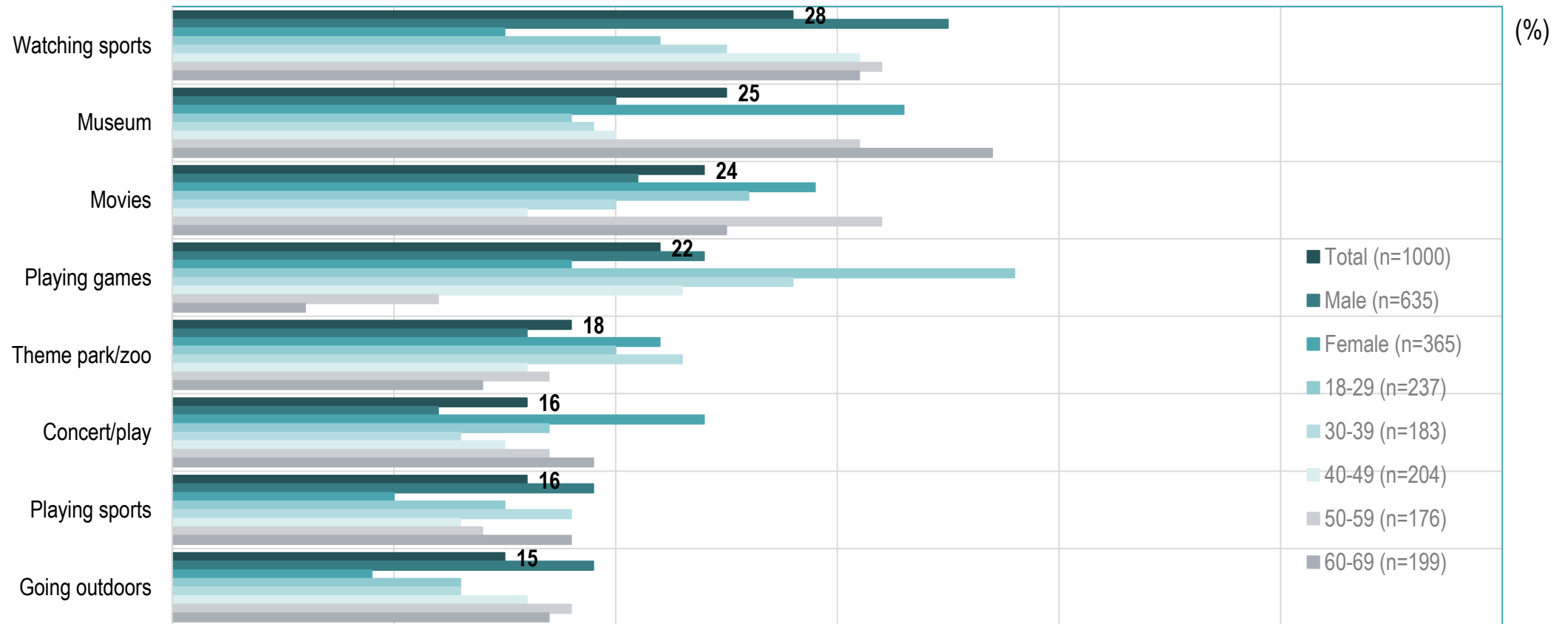
Five hobbies (1)

- Towards the end of the survey, Estonian Awarers are asked to select five activities they like to do from a list. Due to the timing of the survey being under semi-state of emergency, outdoor activities may have scored lower than usual. Domestic travel (46%) is mentioned most, followed by listening to music (42%), reading books (40%) and watching TV (38%). **Activities like to do depend on gender and age.**
- Overseas travel, an activity away from home, is mentioned by 31% of Estonian Awarers, followed by going shopping at 30%.



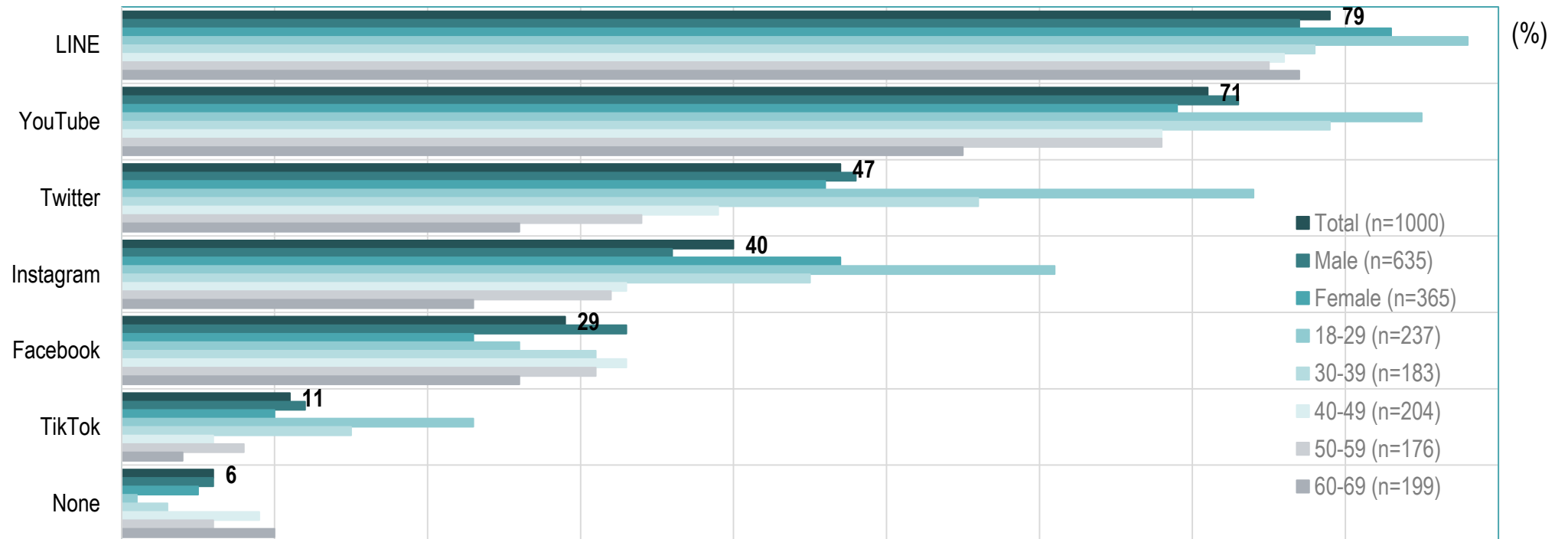
Five hobbies (2)

- Other activities done away from home are less popular with going to museum (25%), movies (24%), visiting theme park/zoo (18%), going to concert/play (16%), playing sports (16%) and going outdoors (15%).



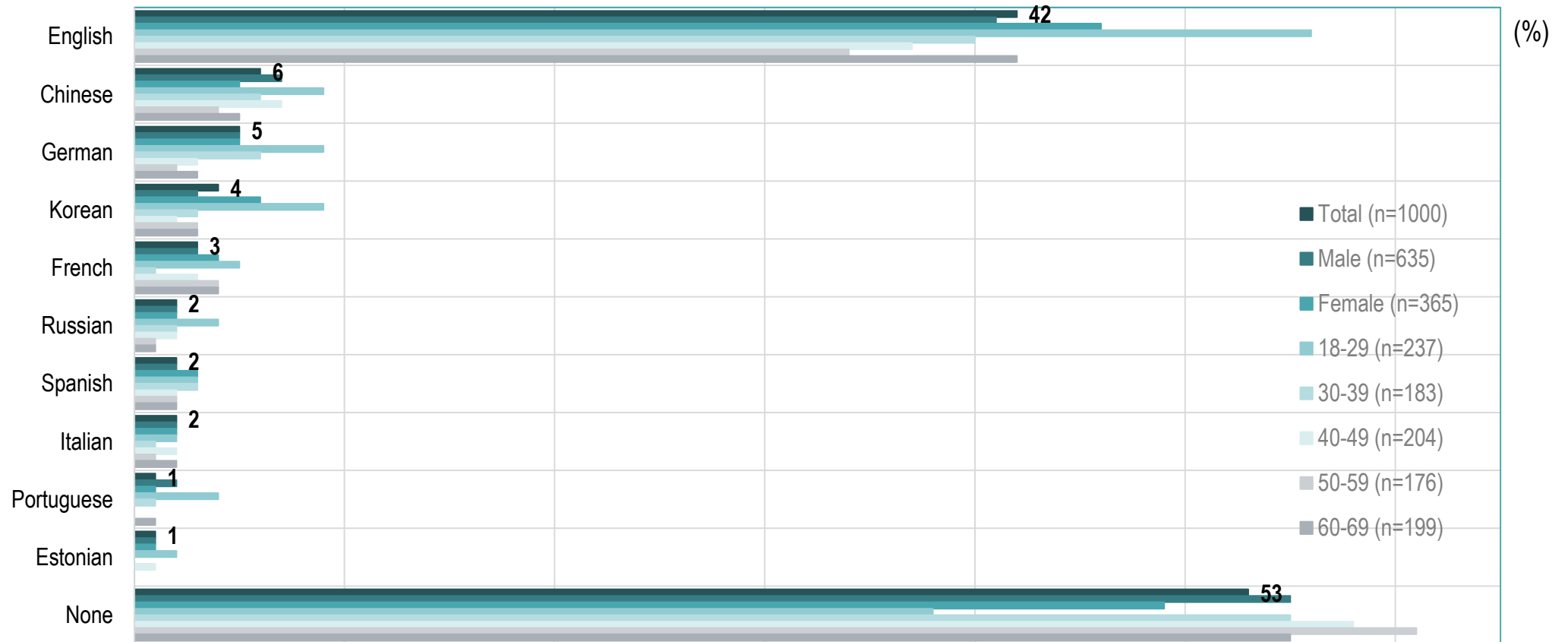
SNS used

- When asked for all the SNS usually used, 79% of Estonian Awarers gave LINE and is used fairly equally among all segments.
- YouTube at 71% is the second most popular SNS, but usage depends on the segment as can be seen with all other SNS.
- Recent trend for searching is no longer “googling”, but via Instagram and YouTube, especially so among the younger generation.



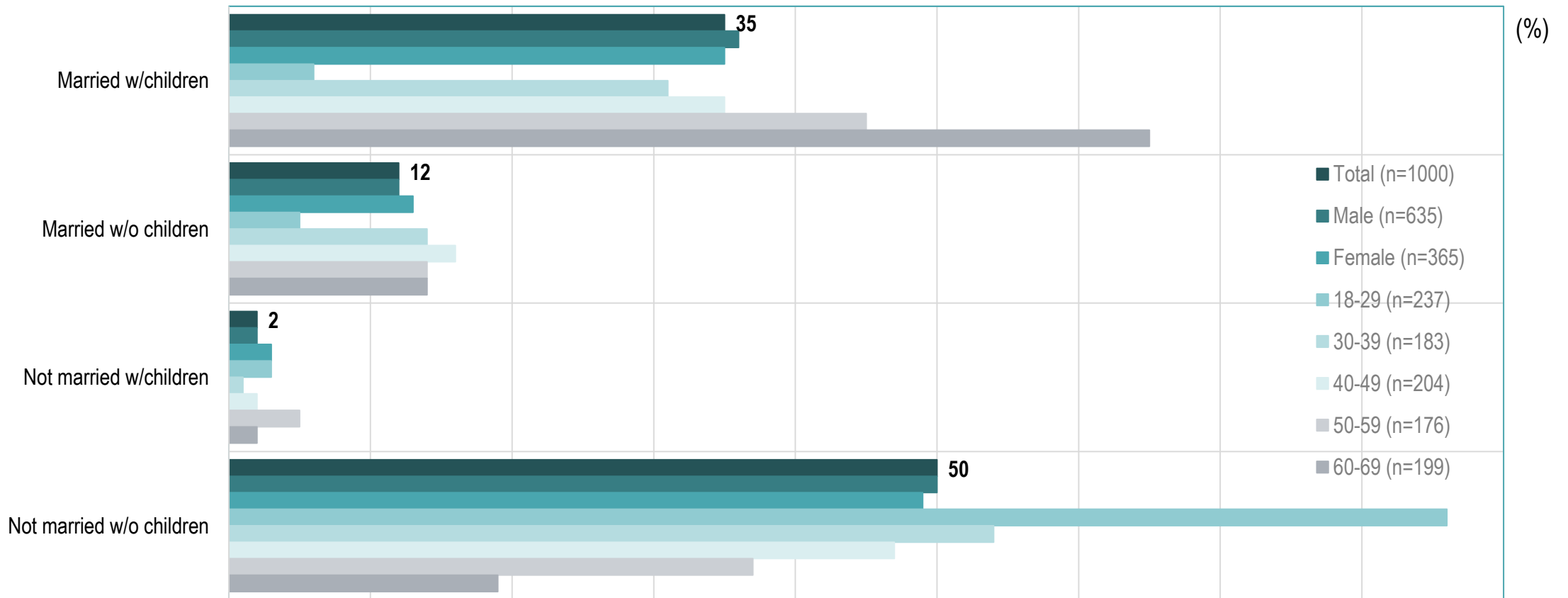
Foreign languages speak

- When Estonian Awarers are asked what foreign language(s) they speak and 42% mentions “English,” followed by Chinese (6%), German (5%), and Korean (4%). Estonian is spoken by 1%. More females and the younger generations tend to be stronger with foreign languages.
- 53% of the Estonian Awarers do not speak any foreign languages.



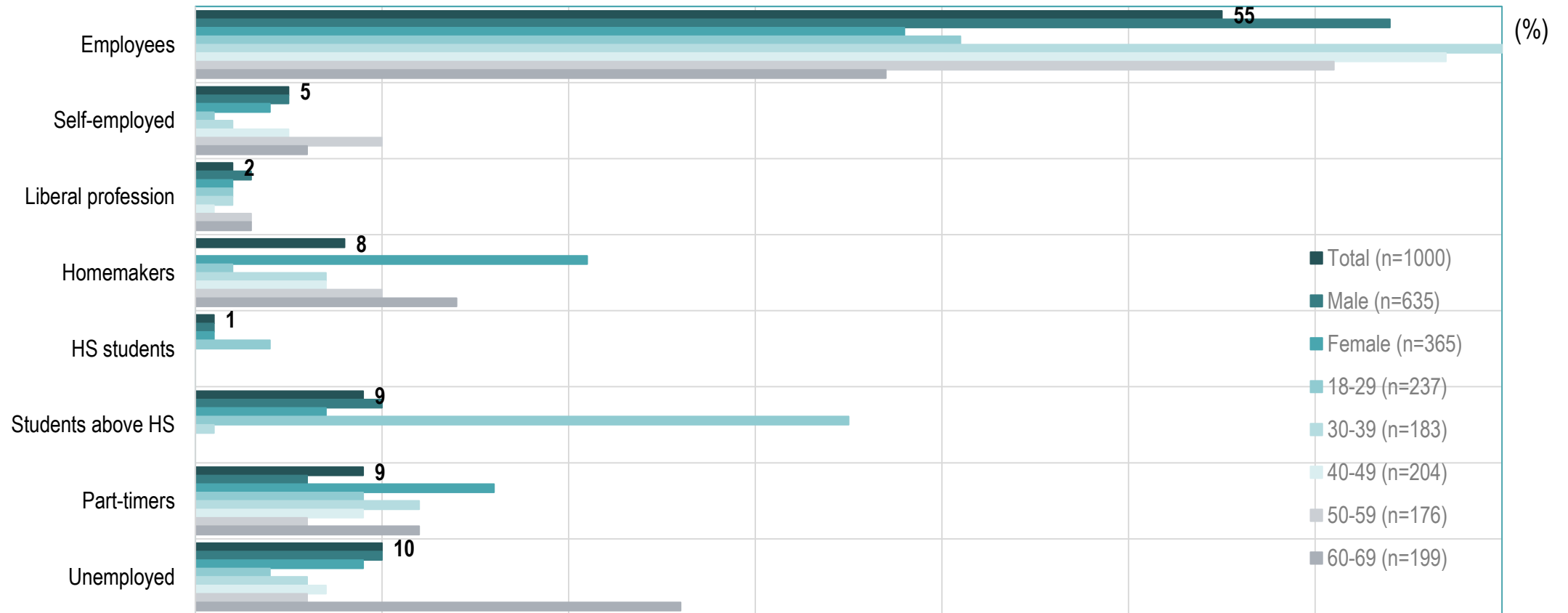
Family

- When asked about families, half of the Estonian Awarers accounted for not married without children, followed by married with children (35%), married without children (12%), and not married with children (2%).



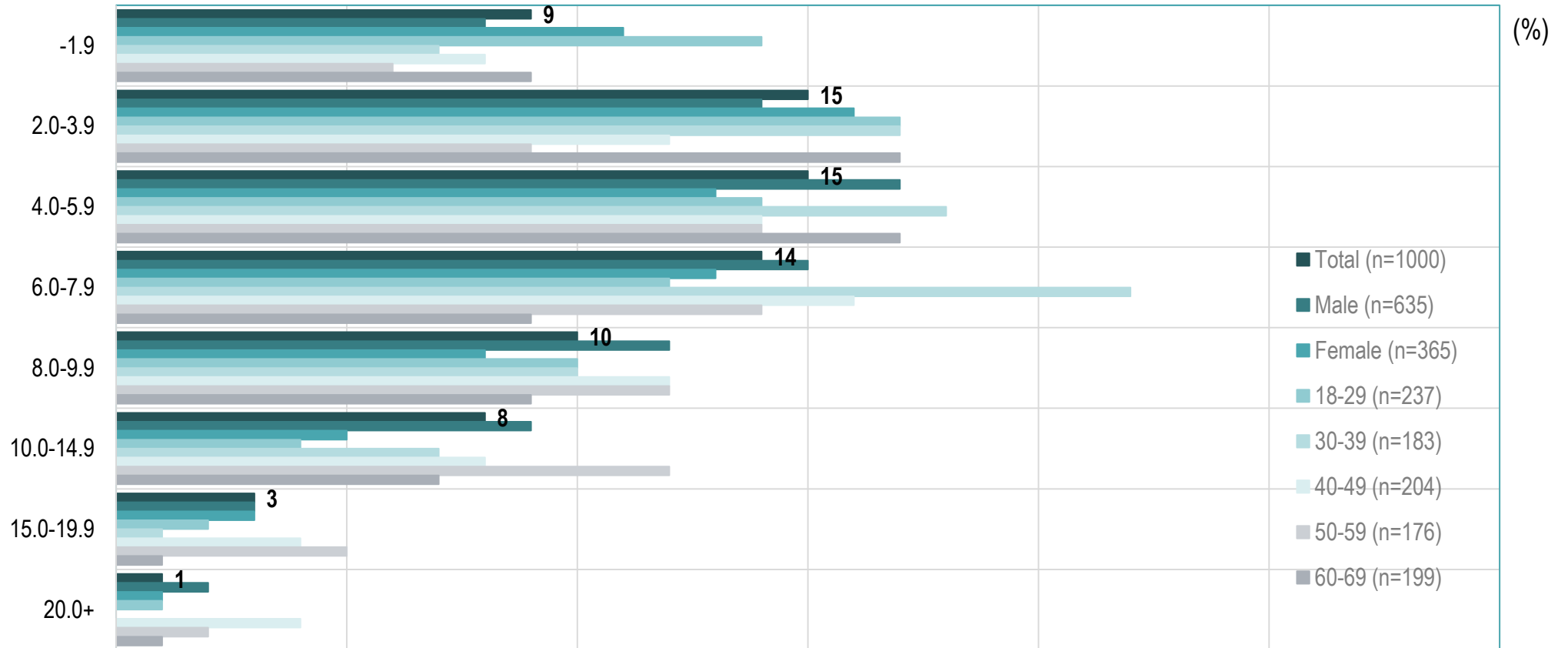
Occupation

- Looking at the occupations of the Estonian Awarers, 55% are full-time employees, 9% part-timers, 5% self-employed, 2% work as liberal profession, 10% students, 8% homemakers, and 10% unemployed.



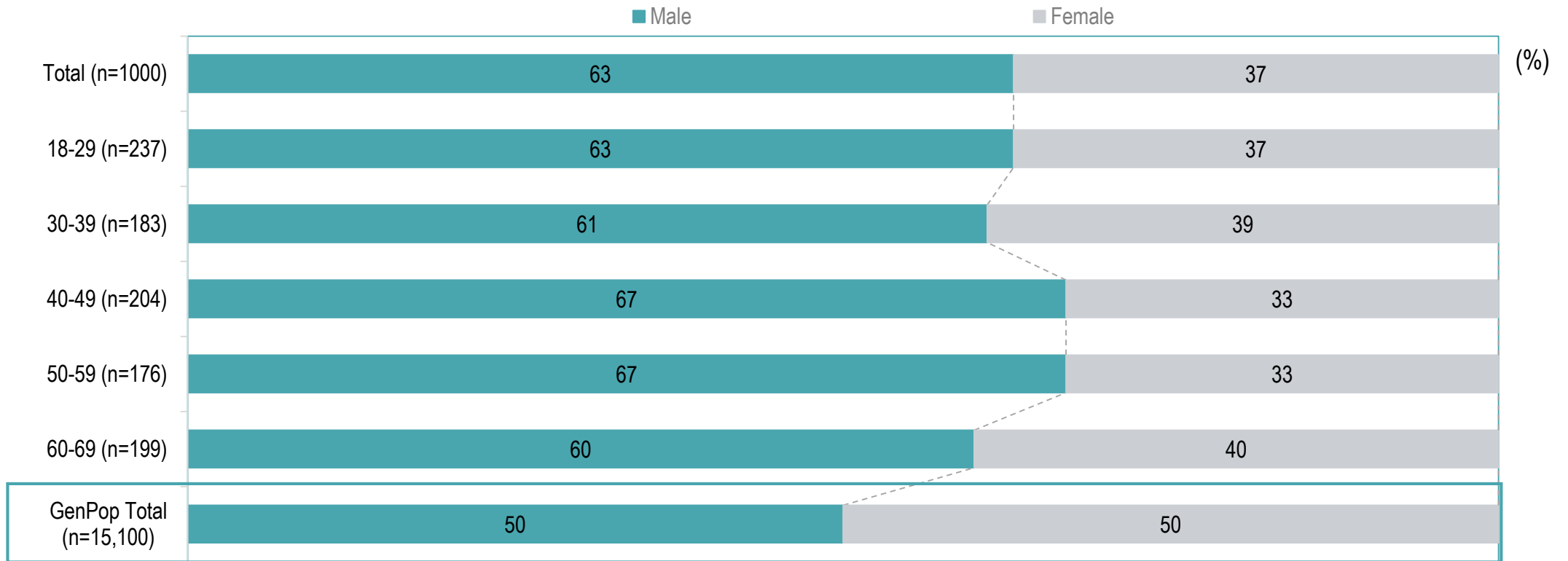
Annual household income in million yen

- With the average annual household income being 5.5 million yen in Japan, 15% of Estonian Awarers falls into 2.0-3.9 and 4.0-5.9 million yen, followed by 6.0-7.9 million yen (14%), and 8.0-9.9 million yen (10%).
- When looking at the extremes, those with average annual household income below 2.0 million yen accounted for 9% and 10.0 million and above at 12%. A quarter did not know or refused to answer.



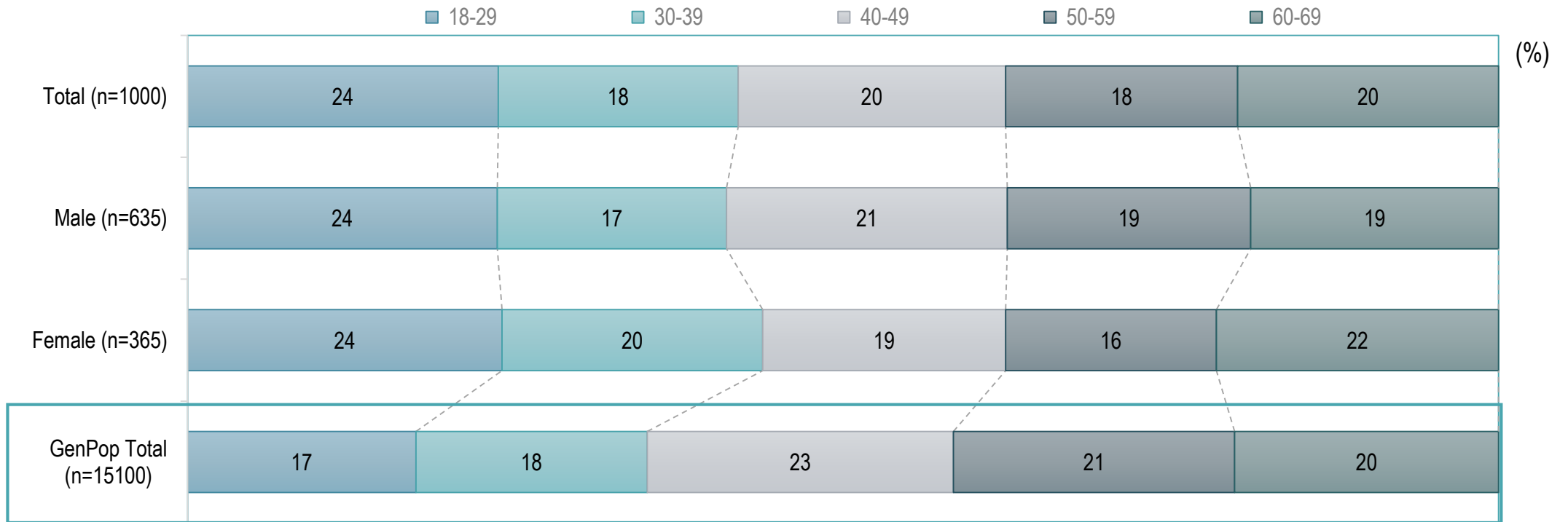
Gender

- Looking at the gender of Estonian Awarers, two thirds are males.
- Significantly more males than females in all age groups know about Estonia.

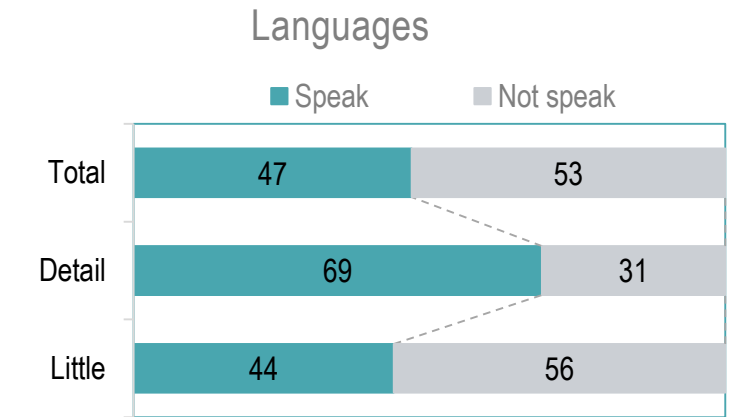
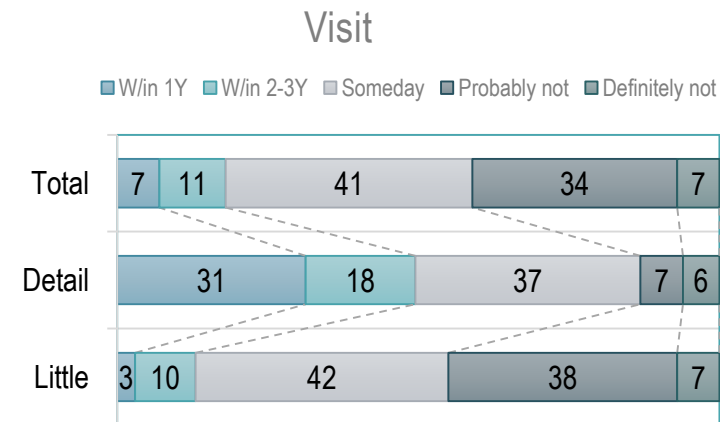
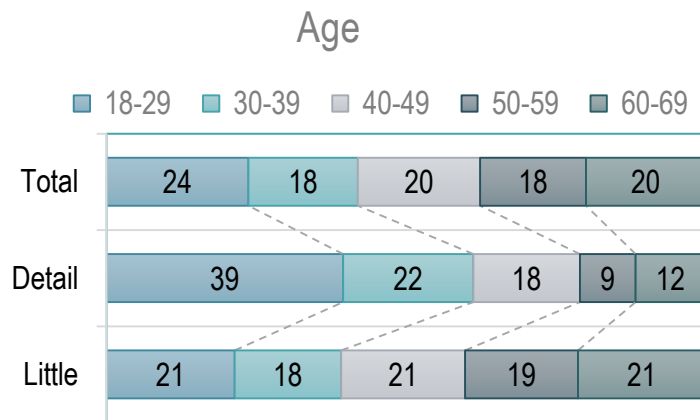
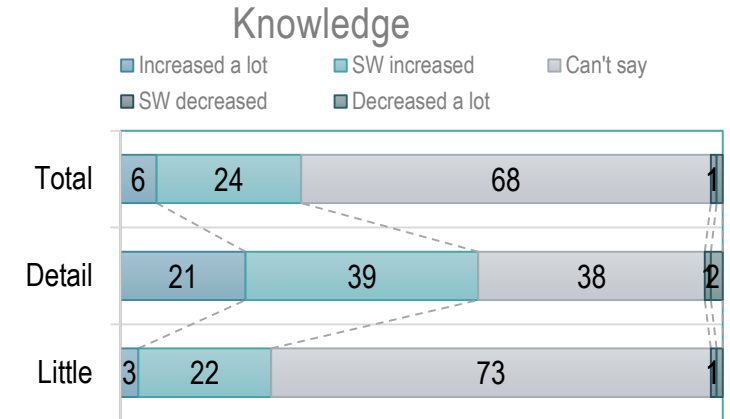
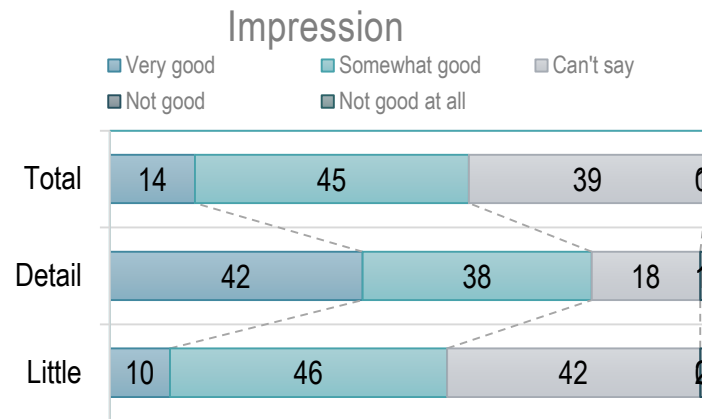
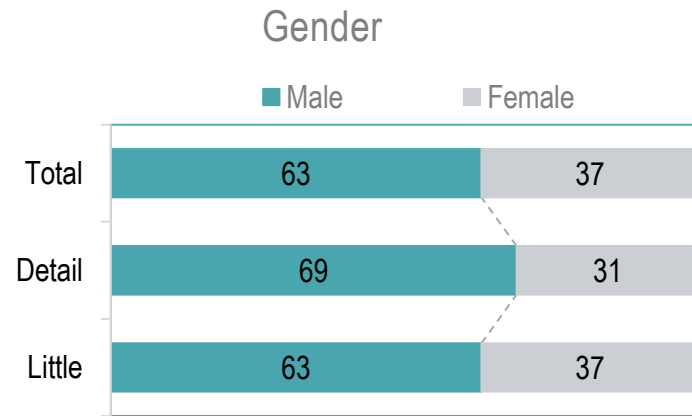


Age

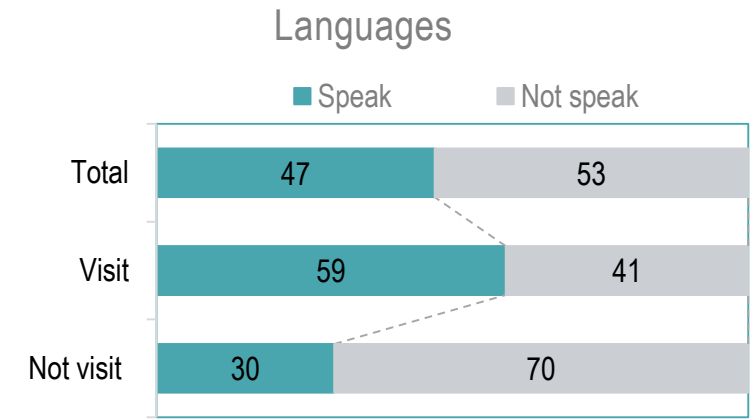
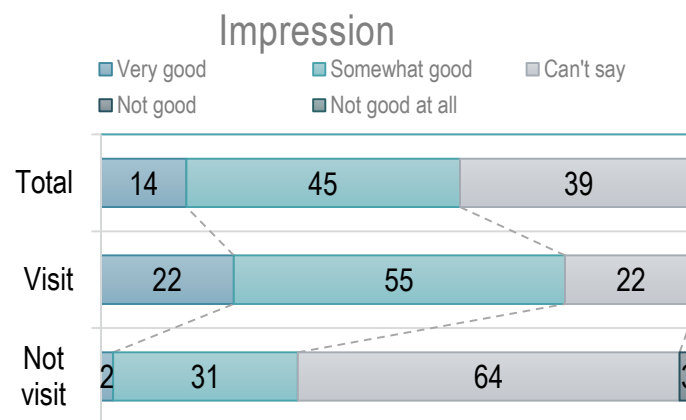
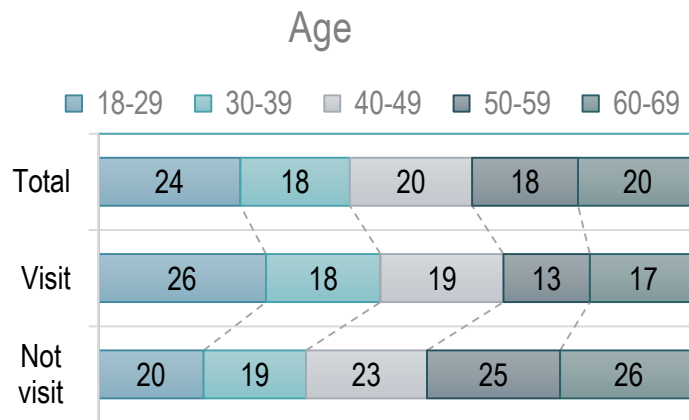
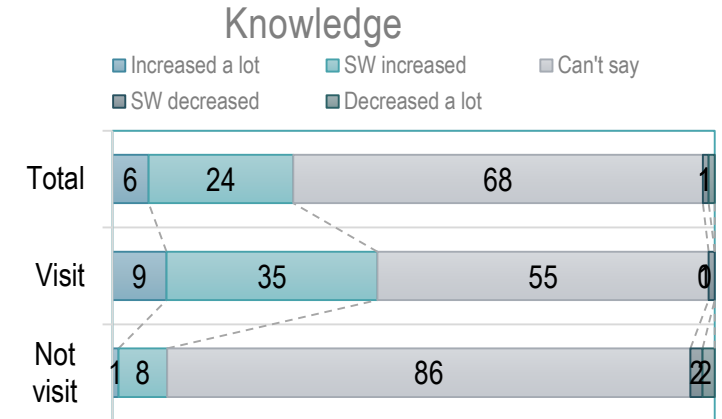
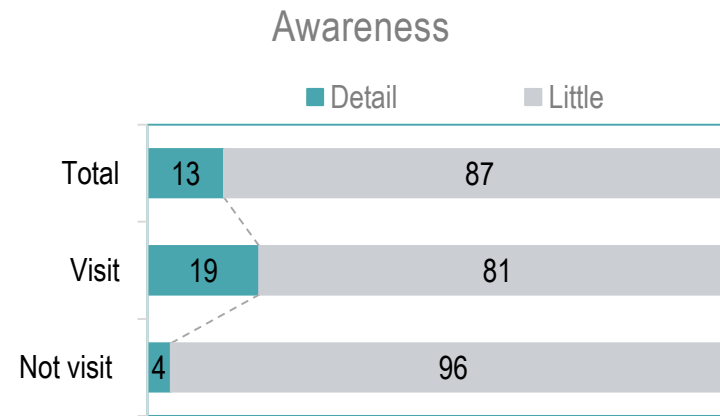
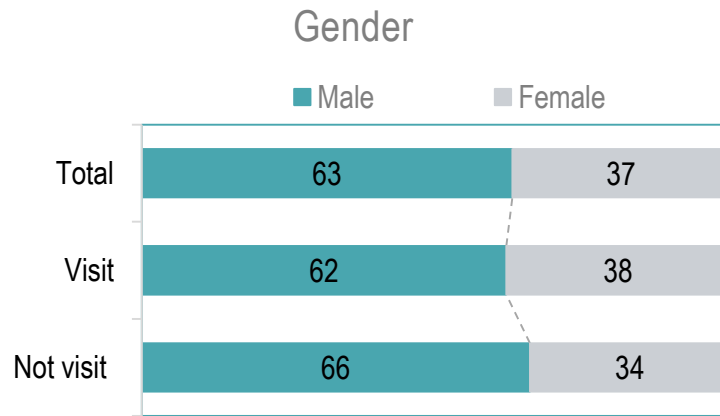
- Observing the age group of Estonian Awarers, the youngest generation tend to be more aware of Estonia than those in their 30s and 50s.



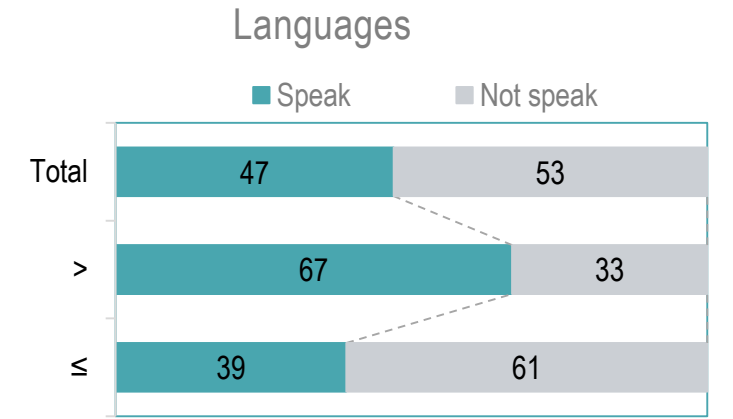
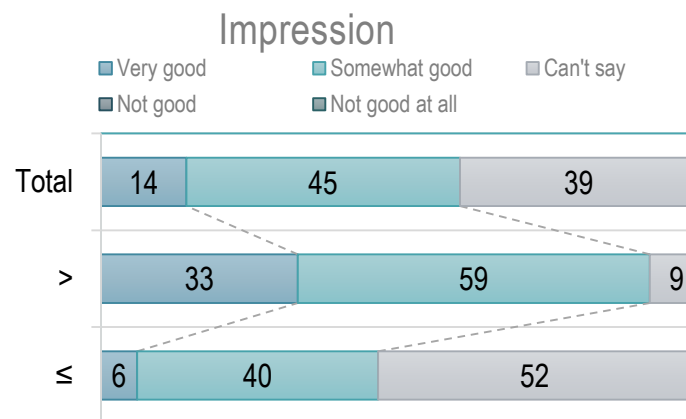
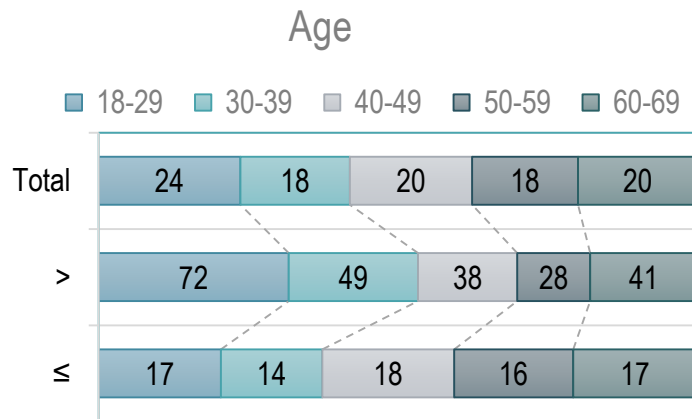
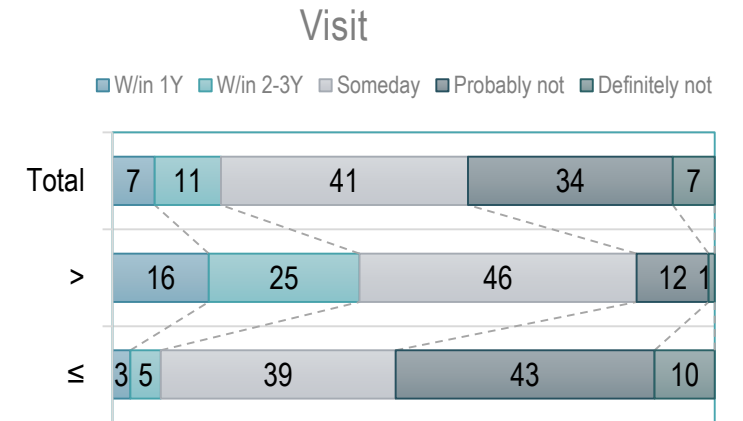
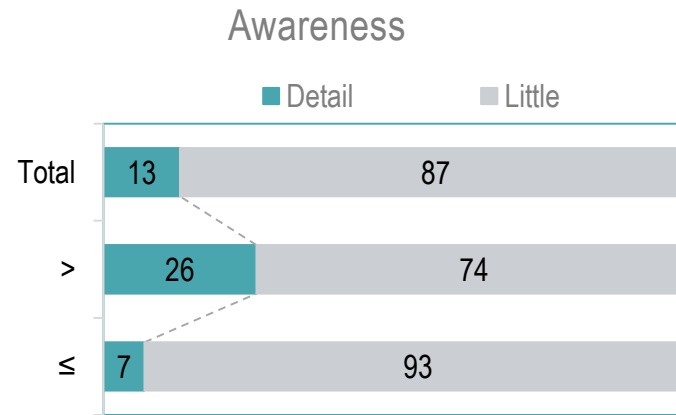
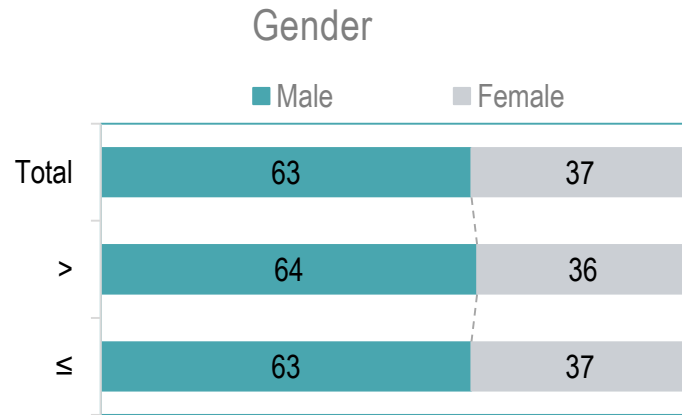
Profiles by Awarers



Profiles by visit intention

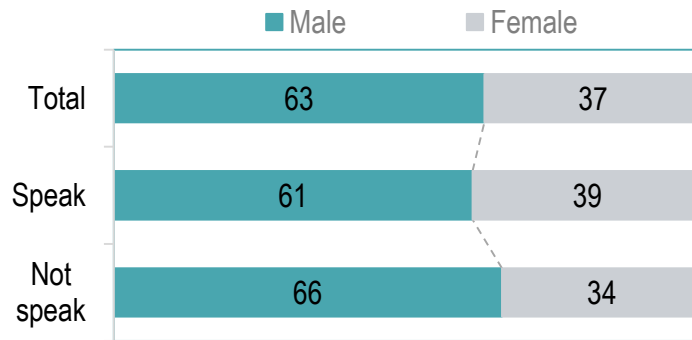


Profiles by changes in knowledge of Estonia in the past 5 years

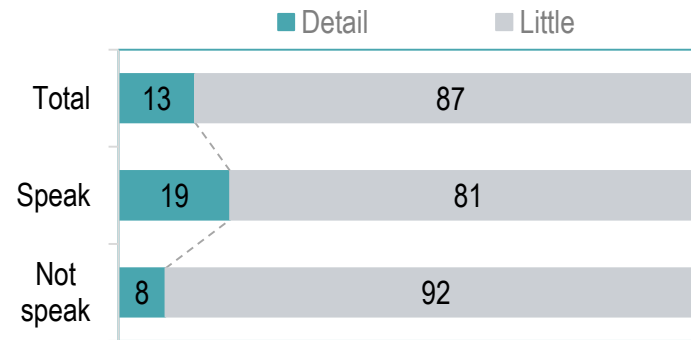


Profiles by speaking foreign languages

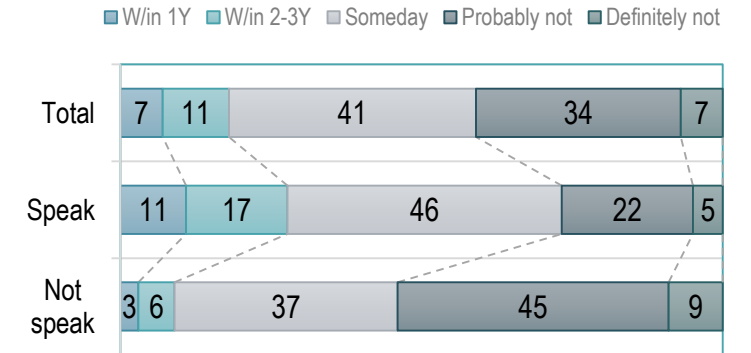
Gender



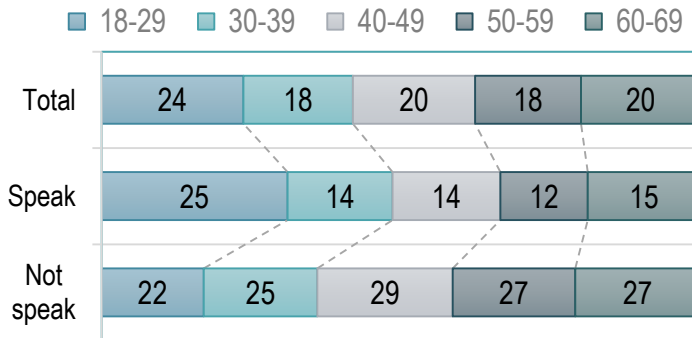
Awareness



Visit



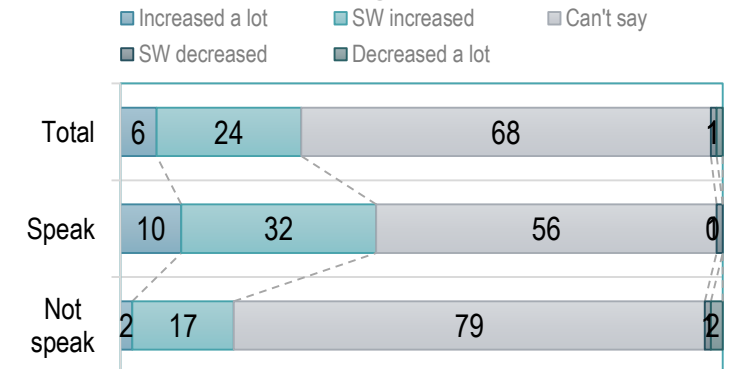
Age



Impression



Knowledge



Appendices: Japanese / English Questionnaire



Questionnaire - 1

海外に関するアンケート

スクリーニング

SQ1. あなたの性別をお選びください。(SA)

	SQ1
男性	1
女性	2

SQ2. あなたの年齢をお選びください。(SA)

	SQ2 18-29	30-39	40-49	50-59	60-69	70以上
	1	2	3	4	5	6

※1才刻みの選択肢で

注意:

SQ2で、「17歳以下、70歳以上」は、調査終了とする。

SQ3. 現在お住まいの地域をお選びください。(SA)

北海道・東北	1	關西	25
北海道	1	滋賀県	25
青森県	2	京都府	26
岩手県	3	大阪府	27
宮城県	4	兵庫県	28
秋田県	5	奈良県	29
山形県	6	和歌山県	30
福島県	7	中国	
関東		鳥取県	31
茨城県	8	島根県	32
栃木県	9	岡山県	33
群馬県	10	広島県	34
埼玉県	11	山口県	35
千葉県	12	四国	
東京都	13	徳島県	36
神奈川県	14	香川県	37
北陸・甲信越		愛媛県	38
新潟県	15	高知県	39
富山県	16	九州・沖縄	
石川県	17	福岡県	40
福井県	18	佐賀県	41
山梨県	19	長崎県	42
長野県	20	熊本県	43
東海		大分県	44
岐阜県	21	宮崎県	45
静岡県	22	鹿児島県	46
愛知県	23	沖縄県	47
三重県	24		

SQ4. あなたご自身、あるいはあなたのご家族や友人・知人に、次のような職業や会社にお勤めの方がいらっしゃいますか。当てはまるものを全てお選びください。(MA)

	SQ4 1	2	3	4	5	終了	続ける
株式会社関係	1						
新築社/雑誌社/テレビ局/ラジオ局等のマスコミ関係	2						
広告代理店やその他広告関係	3						
旅行代理店やその他旅行関係	4						
この中にはない	5						

SQ5. あなたは次の各国をどの程度ご存知ですか。あてはまるものをそれぞれ1つずつお選びください。(各SA)

選択肢ランダム	エストニア	ラトビア	リトアニア	フィンランド	スウェーデン	ノルウェー	デンマーク	ドイツ	ロシア
	SQ5a	SQ5b	SQ5c	SQ5d	SQ5e	SQ5f	SQ5g	SQ5h	SQ5i
どのような国なのか詳しく知っている	1	1	1	1	1	1	1	1	1
どのような国なのか多少は知っている	2	2	2	2	2	2	2	2	2
名前は知っているが、どのような国なのかはほとんど知らない	3	3	3	3	3	3	3	3	3
全く知らない	4	4	4	4	4	4	4	4	4

SQ5a (エストニア) で、「1」または「2」と回答した対象者のみが本調査に含む

Questionnaire - 2

本質問書

このたび私どもでは、海外の様々な国々についてお問いしておりますが、今回あなたには、その中の一つ、「エストニア」についてお問いします。

Q1. あなたがエストニアという国についてご存知のことを、具体的にお答えください。地理や歴史、産業、食べ物、観光など、どのようなことでも結構です。(FA)

Q1	1	2	3	4	5

Q2. では、次の中からあなたがエストニアについてご存知のものを全てお選びください。(MA)

選択肢ランダム	Q2	1	2	3	4	5
北欧にある	1					
東欧にある	2					
バルト3国の1国である	3					
旧ソ連の1国である	4					
IT先進国である	5					
首都は「タリン」である	6					
人口130万人ほどの小国である	7					
他のヨーロッパの国々より比較的物価が安い	8					
Skypeを開発した国である	9					
この中にはない	10					

Q3. あなたはエストニアについて今までどこで見たり聞いたりしましたか。次の中からあてはまるものを全てお選びください。(MA)

家下ドメイン	Q3	1	2	3	4	5
テレビ	1					
新聞	2					
雑誌	3					
書籍	4					
ウェブサイト	5					
ツイッター、フェイスブック、インスタグラムなどのSNS	6					
ユーチューブなどの動画配信サービス	7					
展示会や博覧会などのイベント	8					
旅行代理店	9					
友達/家族/知人との会話	10					
セミナー/オンラインセミナー	11					
その他(具体的に:)	12					

Q4. 次の文章の中から、あなたがエストニアについて持っている印象に最も近いものを1つお選びください。(SA)

Q4	1	2	3	4	5
非常にいい印象を持っている	1				
ややいい印象を持っている	2				
どちらともいえない	3				
あまりいい印象を持っていない	4				
全くいい印象を持っていない	5				

Q5. あなたがエストニアについて持っているイメージにあてはまる文章を次の中からいくつでも結構ですでお選びください。(MA)

選択肢ランダム	Q5	1	2	3	4	5
観光に向いている	1					
治安が良い	2					
親日の国である	3					
街並みが美しい	4					
緑やか	5					
親しみを感じる	6					
食事がおいしい	7					
自然が美しい	8					
スタートアップの国である	9					
寒い/冷たい	10					
貧しい	11					
治安が悪い	12					
その他(具体的に:)	13					

Q6. この質問は、新型コロナウイルス感染症が収束した後のことについてお考え下さい。あなたは、新型コロナウイルス感染症が収束した後、エストニアにどの程度行ってみたいと思いますか。あなたのお気持ちに最も近いものを1つお選びください。(SA)

Q6	1	2	3	4	5
1年以内に行ってみたく思う	1				
1年以内には行かないと思うが、今後2~3年以内には行ってみたいと思う	2				→ Q7
2~3年以内には行かないと思うが、いつかは行ってみたいと思う	3				
たぶん行かないと思う	4				→ Q8
絶対行かないと思う	5				

Q7はQ6で「1-3(行くと思う)」と回答した対象者のみに開く

Q7. エストニアに「行ってみたいと思う」とお答えになった理由を、次の中からいくつでも結構ですでお選びください。(MA)

家下ドメイン	Q7	1	2	3	4	5
物価が安い	1					
食べ物がおいしそう	2					
観光名所がたくさんある	3					
美しい街並みを楽してみたい	4					
他のヨーロッパの国を訪れるついでに行ける	5					
エストニアの文化に親しみたい	6					
治安が良さそう	7					
自然観光を楽しみたい	8					
出張で行く可能性がある	9					
その他(具体的に:)	10					

Questionnaire - 4

全員に可

Q18. 次のエストニア出身の著名人の中で、あなたがご存知の方を全てお選びください。(MA)

	写真	Q18
把爾都(バルト、カイド・ホーヴェルソン) - 元大尉		1
アルヴォ・ベルト - 作曲家		2
パーヴォ・ヤルヴィ - 指揮者(NHK交響楽団首席指揮者)		3
オット・タナック - ライドドライバー(元トヨタ・ガズーチーム)		4
マーリヤ・リース・イルス - 歌手		5
カルマン・キャス - スーパーモデル		6
いずれも知らない		7

Q19. エストニアをあなたにとってもっと身近な国にするためには、エストニアはどのようなことをしたらいいと思いますか。どのようなことでも結構ですので、具体的に回答ください。(FA)

	Q19

これからの興味は、「エストニア」とは全く関係なくお答えください。

Q20. 次の中からあなたが特に好きなものや好きなことを、最大で5つまでお選びください。(MA-回答は5つまで)

	Q20
国内旅行に出かける	1
海外旅行に出かける	2
テーマパーク/遊園地/動物園/水族館に出かける	3
美術館/博物館に出かける	4
映画館で映画を見る	5
ライブ/演劇/音楽等の鑑賞	6
スポーツをする	7
スポーツを観戦する	8
アウトドアに出かける	9
ゲームをプレイする	10
ショッピングに出かける	11
音楽を聴く	12
テレビを見る	13
本/雑誌を読む	14
動画配信サービスで動画を見る	15
その他(具体的に:)	16

Q21. あなたが普段利用しているSNSを、次の中から全てお選びください。(MA)

	Q21
Twitter	1
Facebook	2
LINE	3
YouTube	4
Instagram	5
TikTok	6
その他のSNS(具体的に:)	7
現在利用しているSNSはない	8

Q22. あなたが話することができる外国語を次の中から全てお選びください。(MA)

	Q22
英語	1
フランス語	2
ポルトガル語	3
ドイツ語	4
ロシア語	5
エストニア語	6
スペイン語	7
イタリア語	8
中国語	9
韓国語	10
その他の言語	11
話せる外国語は特になし	12

Questionnaire - 5

Q23. あなたは次のどれに当てはまりますか。(SA)

	Q23
結婚している（子供がいる）	1
結婚している（子供はいない）	2
結婚していない（子供がいる）	3
結婚していない（子供はいない）	4

Q24. あなたのご職業をお選びください。(SA)

	Q24
勤め人(会社員、公務員など)	1
自営業(個人・商店経営者など)	2
自由業(医者、弁護士、プログラマーなど)	3
専業主婦・主夫(パート含む)	4
高校生	5
大学院/大学/短大/専門学校	6
フリーター、パート	7
無職	8
その他	9

Q25. あなたのご家庭の世帯年収がおわかりになりましたら、お選びください。(SA)

	Q25
200万円未満	1
200万円以上400万円未満	2
400万円以上600万円未満	3
600万円以上800万円未満	4
800万円以上1,000万円未満	5
1,000万円以上1,500万円未満	6
1,500万円以上2,000万円未満	7
2,000万円以上	8
わからない	9

アンケートは以上で終了です。今回のアンケートは在日エストニア大使館の企画によるものでした。皆様からいただいた貴重なご意見は、今後の日本でのエストニアの啓蒙活動に活かしてまいります。

Questionnaire - 6

Estonian image in Japan Q're

Screened

SQ1. Gender (SA)

	SQ1
Male	1
Female	2

SQ2. Please tell us your age (SA)

	SQ2 18-29	Years old

Note:

If the respondent is 17 years or younger OR 70 years or older at SQ2, thank & terminate.

SQ3. Where is your current place of residence? (SA)

Hokkaido/Tohoku		Kansai	
Hokkaido	1	Shiga	25
Aomori	2	Kyoto	26
Iwate	3	Osaka	27
Miyagi	4	Hyogo	28
Akita	5	Nara	29
Yamagata	6	Wakayama	30
Fukushima	7		
		Chugoku	
Kanto		Tottori	31
Ibaraki	8	Shimane	32
Tochigi	9	Okayama	33
Gunma	10	Hiroshima	34
Saitama	11	Yamaguchi	35
Chiba	12		
Tokyo	13	Shikoku	
Kanagawa	14	Tokushima	36
		Kagawa	37
		Ehime	38
Hokuriku/Koshuetsu		Kochi	39
Niigata	15		
Toyama	16	Kyuuahu/Okinawa	
Ishikawa	17	Fukuoka	40
Fuku	18	Saga	41
Yamanashi	19	Nagasaki	42
Nagano	20	Kumamoto	43
		Oita	44
Tokai		Miyazaki	45
Gifu	21	Kagoshima	46
Shizuoka	22	Okinawa	47
Aichi	23		
Mie	24		

SQ4. Do you or does any member of your household, friends, or acquaintances work in any of these occupations? Please select all that apply. (MA)

	SQ4	
Marketing research related	1	Terminate
Newspaper, magazines, television, radio, or other mass media-related	2	
Advertising agency or other advertising related	3	
Travel agency	4	
None of these	5	Continue

SQ5. How much do you know about the following countries? Please choose one for each country. (Each SA)

	Estonia SQ5a	Latvia SQ5b	Lithuania SQ5c	Finland SQ5d	Sweden SQ5e	Norway SQ5f	Denmark SQ5g	Germany SQ5h	Russia SQ5i
I know in detail about what kind of country it is	1	1	1	1	1	1	1	1	1
I know a little bit about what kind of country it is	2	2	2	2	2	2	2	2	2
I know the name, but I know very little about what kind of country it is	3	3	3	3	3	3	3	3	3
I don't know anything	4	4	4	4	4	4	4	4	4

Only those respondents who answered "1" or "2" in SQ5a (Estonia) will proceed to the main survey.

Questionnaire - 7

Main Survey

We have been asking about various countries overseas, and this time we would like to ask you about one of them, Estonia.

Q1. Please tell us specifically what you know about the country of Estonia. It can be anything from geography, history, industry, food, tourism, etc. (FA)

Q2. From the list below, please choose all that you know to be true about Estonia. (MA)

Located in Northern Europe	1	
Located in Eastern Europe	2	
One of the three Baltic countries	3	
One of the former Soviet Union	4	
The most advanced IT nation	5	
The capital is Tallinn	6	
A small country with a population of about 1.3 million	7	
Prices are relatively lower than other European countries	8	
The country where Skype was developed	9	
None of the above	10	

Q3. Where have you seen or heard about Estonia so far? Please choose all that apply. (MA)

TV	1	
Newspaper	2	
Magazines	3	
Books	4	
Websites	5	
SNS such as Twitter, Facebook, and Instagram	6	
Video Streaming Services such as YouTube	7	
Events such as exhibitions and expositions	8	
Travel agencies	9	
Conversations with friends/family/acquaintances	10	
Webinar or physical seminar	11	
Others (specify:)	12	

Q4. From the following sentences, please choose the one that most closely matches the impression you have about Estonia. (SA)

I have a very good impression	1	
I have a somewhat good impression	2	
Can't say either	3	
I don't have a very good impression	4	
No good impression at all	5	

Q5. From the following list, please choose as many sentences as you like that you think fit the image you have of Estonia. (MA)

Good for sightseeing	1	
Safe and secure	2	
A pro-Japanese country	3	
Beautiful cityscape	4	
Calm	5	
I feel friendly	6	
Food is delicious	7	
Nature is beautiful	8	
Startup Nation	9	
Cold	10	
Poor	11	
Unsafe or insecure	12	
Others (specify:)	13	

Q6. Please think about this question after the new coronavirus infection is under control. To what extent would you like to visit Estonia after the new coronavirus infection is under control? Please choose one that most closely matches your feelings. (SA)

Will visit within 1 year	1	
Will visit within 2-3 years	2	
Not within 2-3 years, but will visit someday	3	
Probably will not visit	4	
Definitely will not visit	5	

Q7 is asked to those who answered "1-3 (Will visit)" at Q6

Q7. Please select as many reasons as possible why you answered "will visit Estonia" from the following (MA)

The prices are cheap	1	
Food looks delicious	2	
Lots of tourist attractions	3	
I want to enjoy the beautiful scenery of the city	4	
Can visit while visiting other European countries	5	
I want to get familiar with Estonian culture	6	
Safety seems good	7	
Nature tourism	8	
Business tourism	9	
Others (specify:)	10	

Q8 is asked to those who answered "4-5 (Will not visit)" at Q6

Q8. Please select as many reasons as possible why you answered "will not visit Estonia" from the following (MA)

Prices seem high	1	
I'm not familiar with the food	2	
Not familiar with tourist attractions	3	
Not easy to get to	4	
Doesn't seem safe	5	
Not enough information in Japanese	6	
Because the effects of the new coronavirus pandemic will remain	7	
Others (specify:)	8	

Questionnaire - 8

Ask all

Q9. From the list below, please choose all that you would like to experience about Estonia in the future. (MA)

*Randomize	Q9
Live in Estonia	1
Visit to Estonia	2
Study Estonian Language	3
Try Estonian food	4
Buy/use products made in Estonia	5
Make Estonian friends/acquaintances	6
Experience Estonian culture (music/art, etc.)	7
Do business with Estonian companies	8
Establish a company in Estonia	9
Others (specify: _____)	10
There is nothing in particular that I would like to experience about Estonia	11

Q10. From the list of experiences below about Estonia, please choose all that apply to you. (MA)

*Randomize	Q10
Have lived in Estonia	1
Have visited Estonia before	2
Have studied the Estonian Language	3
Have tried Estonian food	4
Have bought/used products made in Estonia	5
Have made Estonian friends/acquaintances	6
Have experienced Estonian culture (music/art, etc.)	7
Have done business with Estonian companies	8
Others (specify: _____)	9
No particular experience with Estonia	10

Q11. Do any of the following industries resonate with your knowledge about Estonia? (MA)

*Randomize	Q11
Information technology and communications	1
Tourism destination	2
Transport and shipping	3
Music/Film/Culture	4
Wooden houses/Saunas	5
Design	6
Food	7
Others (specify: _____)	8
Not sure/None in particular	9

Q12. In your opinion, the business climate in Estonia is: (SA)

*Randomize	Q12
Very stable	1
Stable	2
Can't say either	3
Unstable	4
Very unstable	5
Not sure	6

Q13. In your opinion, the political climate in Estonia is: (SA)

*Randomize	Q13
Very stable	1
Stable	2
Can't say either	3
Unstable	4
Very unstable	5
Not sure	6

Q14. In your opinion, which color associates best with Estonia: (SA)

*Randomize	Q14
Blue	1
Green	2
Red	3
Yellow	4
White	5
Black	6
Others (specify: _____)	7
Not sure/None in particular	8

Q15. In your opinion, has your knowledge about or familiarity with Estonia increased or decreased during the past 5 years? (SA)

*Randomize	Q15
Increased a lot	1
Somewhat increased	2
Can't say either	3
Somewhat decreased	4
Decreased a lot	5

Q16. Have you ever heard the word "e-Residency" before? (SA)

*Randomize	Q16
Yes	1 → Q17
No	2 → Q18

Q17 is asked only to those who answered "Yes" at Q16

Q17. Please tell us specifically what you know about "e-Residency". (FA)

*Randomize	Q17

Questionnaire - 9

Ask all

Q18. Have you heard of the following Estonians? (SA)

		Q18
Garino (Garino Hõõvelmaa) – Former Ozeki-ranked wrestler		1
Arvo Pärt – Composer		2
Paavo Järvi – Conductor and Artistic Director of NHK SO		3
Ott Tänak – Rally Driver (Toyota Gazoo Team)		4
Maarja-Liis Luik – Singer		5
Carmen Kass – Supermodel		6
None of the above		7

Q19. What do you think Estonia should do to make Estonia a more accessible country to you? If any, please make as many suggestions as you can. (FA)

Please answer the following questions without any relation to "Estonia"

Q20. Please select up to five answers that you especially like from the following list. (MA - Up to five)

*Randomize	Q20
Domestic travel	1
Overseas travel	2
Visiting the theme park/amusement park/zoo/aquarium	3
Visiting the art museum or museum	4
Watching the movie at a movie theater	5
Going to the live concert, play, etc	6
Playing sports	7
Watching the sports	8
Going outdoors	9
Playing the game	10
Going shopping	11
Listening to music	12
Watching TV	13
Reading the book/magazine	14
Watching videos on video streaming services	15
Others (specify)	16

Q21. Please select all of the following social networking services that you usually use. (MA)

*Randomize	Q21
Twitter	1
Facebook	2
LINE	3
YouTube	4
Instagram	5
TikTok	6
Other SNS (specify)	7
I am not currently using any SNS	8

Q22. What foreign languages do you speak? Please choose all that apply to you. (MA)

*Randomize	Q22
English	1
French	2
Portuguese	3
German	4
Russian	5
Estonian	6
Spanish	7
Italian	8
Chinese	9
Korean	10
Other languages	11
I don't speak any particular foreign language	12

Questionnaire - 10

Q23. Which of the following applies to you? (SA)¹⁾

	G23 ²⁾	
Married with children ³⁾	1 ⁴⁾	
Married with no children ³⁾	2 ⁴⁾	
Not married and have children ³⁾	3 ⁴⁾	
Not married and have no children ³⁾	4 ⁴⁾	

Q24. Please tell us your occupation. (SA)¹⁾

	G24 ²⁾	
Salaried worker ³⁾	1 ⁴⁾	
Owner on my account ³⁾	2 ⁴⁾	
Liberal profession (doctor, lawyer, programmer, etc.) ³⁾	3 ⁴⁾	
Homemaker (including part-time working) ³⁾	4 ⁴⁾	
High school student ³⁾	5 ⁴⁾	
Post-graduate/University/College/Junior college/Vocational school student ³⁾	6 ⁴⁾	
Job hopping/Part-time worker ³⁾	7 ⁴⁾	
Without occupation ³⁾	8 ⁴⁾	
Others ³⁾	9 ⁴⁾	

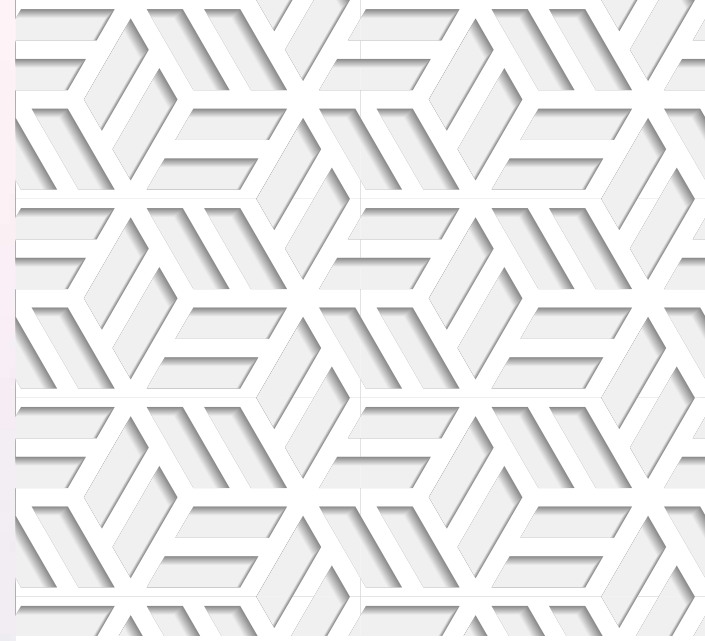
Q25. Please indicate your household income if you know it. (SA)¹⁾

	G25 ²⁾	
Less than 2 million yen ³⁾	1 ⁴⁾	
2 million to less than 4 million yen ³⁾	2 ⁴⁾	
4 million to less than 6 million yen ³⁾	3 ⁴⁾	
6 million to less than 8 million yen ³⁾	4 ⁴⁾	
8 million to less than 10 million yen ³⁾	5 ⁴⁾	
10 million to less than 15 million yen ³⁾	6 ⁴⁾	
15 million to less than 20 million yen ³⁾	7 ⁴⁾	
20 million yen or more ³⁾	8 ⁴⁾	
Don't know ³⁾	9 ⁴⁾	

Thank you for your time and cooperation.
 This survey was organized by the Embassy of Estonia in Japan. Your valuable answers will be utilized in our future activities to educate people about Estonia in Japan.



Thank you for your
time.
We are happy to chat
further with you.



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