

Population survey in Germany: interest in the Baltics and Estonia as holiday destinations

Commissioned by Estonian Business and Innovation Agency

Carried out by RAIT Faktum & Ariko OÜ

Time of the fieldwork: 8-10 Nov. 2022



European Union
European Regional
Development Fund



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Summary. Travel intentions in the next 3 years and Estonia's place in these intentions

- Invitations to participate in the study were sent to 18-79-year-old members of an [online panel](#) of the German population according to the socio-demographic profile of the population in terms of gender, age and region of residence. The final sample (N=1015) consisted of those who answered in the filter question that they plan to take holiday trips abroad in the next 3 years (81% of the original sample).
- **The most common option is to go on leisure trips abroad once a year** (this was mentioned by 48% of the target group). 1/3 travel 2 or more times a year, while only 18% travel 1-2 times in 3 years.
- People aged 25-54 and people with a higher income plan to travel more often (2+ times a year) than average.
- **64% of those who have visited Estonia and 42% of those interested in holidaying in the Baltics are frequent travellers** (planning 2 or more trips a year)
- **25% of the target group claim that they know a lot about Estonia or they know more than just its name and location.** 47% only know the name and location of Estonia, and the remaining 28% know less or nothing at all. Awareness is slightly higher among men, younger age groups (up to 44), higher income groups, frequent travellers, those who have been to Estonia and those interested in holidaying in the Baltics.
- **20% of the target group have been to Finland, 8-9% to Estonia, Latvia and Lithuania.** There are no big differences between the age groups or regions of residence in terms of visiting Estonia.
- 45% of those who have visited Estonia have also been to Finland, 36% have also been to Latvia and 32% to Lithuania. Thus, German residents combine Estonia with a visit to Finland somewhat more than with a visit to other Baltic countries (probably this is related to the fact that some of the respondents have visited Estonia as part of a Baltic Sea cruise, which includes, among others, a visit to Helsinki and Tallinn; also some respondents may have taken a boat trip across the Gulf of Finland when visiting Helsinki or Tallinn).

Summary. Interest in visiting Estonia and the Baltic countries

- 45% of the respondents are interested in vacationing in one of the Baltic countries in the next 3 years, 44% are interested in receiving additional information about the Baltics to decide if they want to visit, and 12% are not interested in either option.
- 28% of those who are interested in the Baltic States cited as a reason of interest the fact that they like to travel and discover new places and would like to visit the Baltic States for a change, because these are little known, something new and different. 23% stated that these are beautiful, interesting countries/cities. 1/5 mentioned beautiful nature, 1/5 interest in culture. 7% named pleasant people / the desire to get to know people, 6% mentioned interesting history (USSR, Baltic-German history, Hanseatic League).
- Those who are not interested in the Baltics, say in the open question that there are more interesting destinations which they prefer to visit (56%). 13% say they prefer warm countries. 8% mention a lack of security (war in Ukraine or proximity to Russia).
- If one decides to visit the Baltic countries, the preferred way of travel would be independent travel (72%). 11% prefer a group tour. The preference for group travel is higher than average among older age groups and in the lower income groups.
- When traveling to the Baltics, the preferences for the booking method are fairly evenly divided among 3 options: online on a tour operator's website (32%), through another online booking channel (30%), using a travel consultant of a local travel agency (29%).
- When visiting the Baltic countries, 55% said they would like to visit Estonia, 41% Latvia and 29% Lithuania. Since in reality German tourists have always visited Lithuania and Latvia more than Estonia, it is not certain whether the respondents indicated greater interest in Estonia because they knew that the survey was commissioned by Estonia. Of those who want to travel to Estonia, 43% would like to visit only Estonia, 28% would like to visit one more country (Latvia or Lithuania) in addition to Estonia and 29% would like to visit all 3 countries. People aged 35-54 and 65-79 have higher interest in Estonia than other age groups.
- For those who want to visit Estonia, the 2 clearly preferred travel options would be a holiday in the city (63% named it among the 3 most important options) and a holiday in the countryside (59%). Relatively important options are also traveling by car or motorhome (37%) and a cruise on the Baltic Sea (23%). An organized bus trip has a rather modest place in preferences (12%), but 1/3 of those over 65 named it among the 3 most important options.

Summary. Travel activities, image of Estonia, information sources, CO2 compensation

Travel activities, image

- When traveling to Estonia, the most important attractions would be the islands and the Baltic Sea coast, followed by restaurants, nature parks / national parks and old architecture (both medieval and wooden).
- The image of Estonia mainly consists of the following characteristics: Estonia is a safe destination; Estonia has a reasonable price level; it is easy to come to Estonia; Estonia's proximity to Finland also inspires people to travel to Estonia. Those who have visited Estonia gave higher ratings to all aspects (compared to those who have not been to Estonia).

Other - Sources of inspiration for holiday planning and readiness to offset CO2 emissions at the travel destination

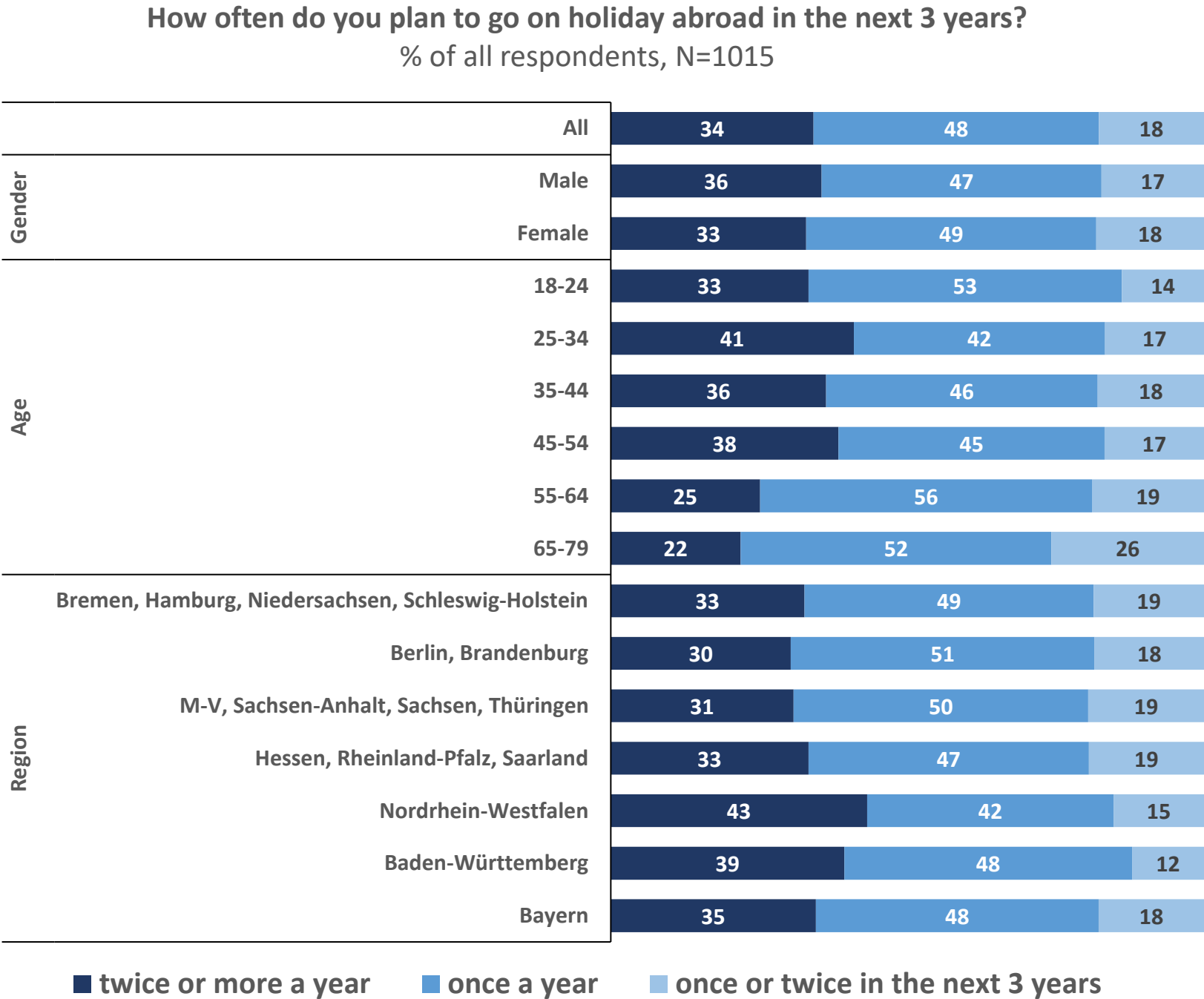
- The main sources of inspiration for planning holidays are Google and other search engines, followed by travel agencies / tour operators, travel review websites (e.g. Tripadvisor) and social media.
- The younger the age group, the more important is social media for them. The older the age group, the more important are publications for them (travel books, brochures, press). However, even for the oldest age group, publications are not the most important sources (41% of 65-79-year-olds cited search engines (e.g. Google), official websites of destinations and travel agencies among the 3 most important sources; 28% of them said the same about travel books).
- 22% of respondents are not ready to offset CO2 emissions at the travel destination. 21% are ready to donate 1-4 euros, 28% 5-9 euros and 30% 10+ euros. The youngest group is ready to donate more than the average (43% 5-9 euros). The oldest group (65-79 years old) is divided into two opposite poles - almost half are not ready to donate anything, while 31% would donate 10+ euros. Those with a higher income, frequent travelers and those interested in traveling to the Baltics are ready to donate more than the average.

A background image featuring a pair of black-rimmed glasses and a black pen resting on a document. The document contains a bar chart with several blue bars of varying heights. The entire image has a dark blue overlay.

Travel intentions in the next 3 years, inspiration
sources, offsetting CO2 emissions

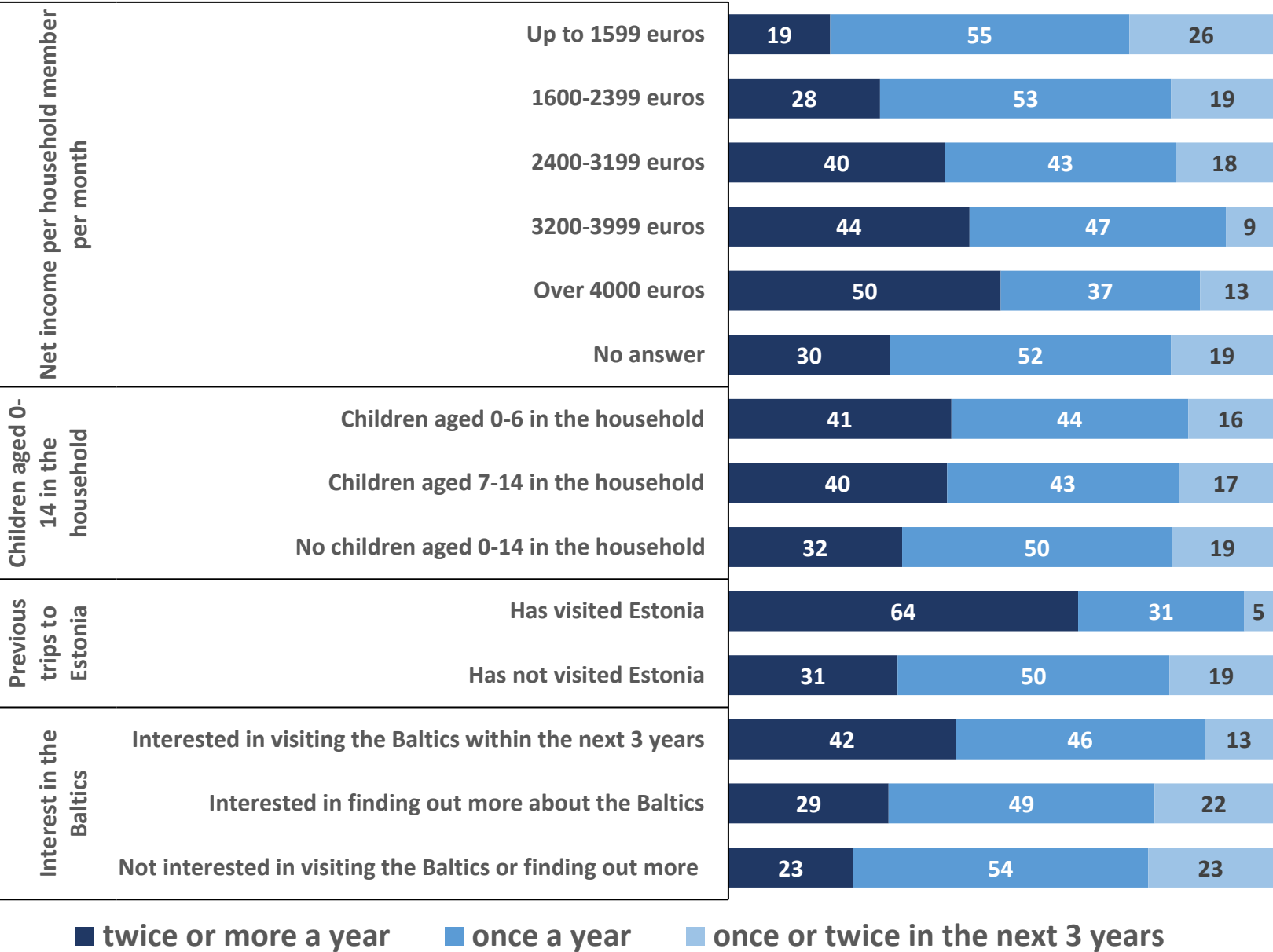
Holiday trips abroad in the next three years

- The most common option is to take vacation trips abroad once a year (this was mentioned by 48% of the target group). 1/3 travel 2 or more times a year, while only 18% travel 1-2 times in 3 years.
- People aged 25-54 and people with a higher income plan to travel slightly more often (2+ times a year) than average.
- 64% of those who have visited Estonia before and 42% of those interested in vacationing in the Baltics are frequent travelers (planning 2 or more trips a year)



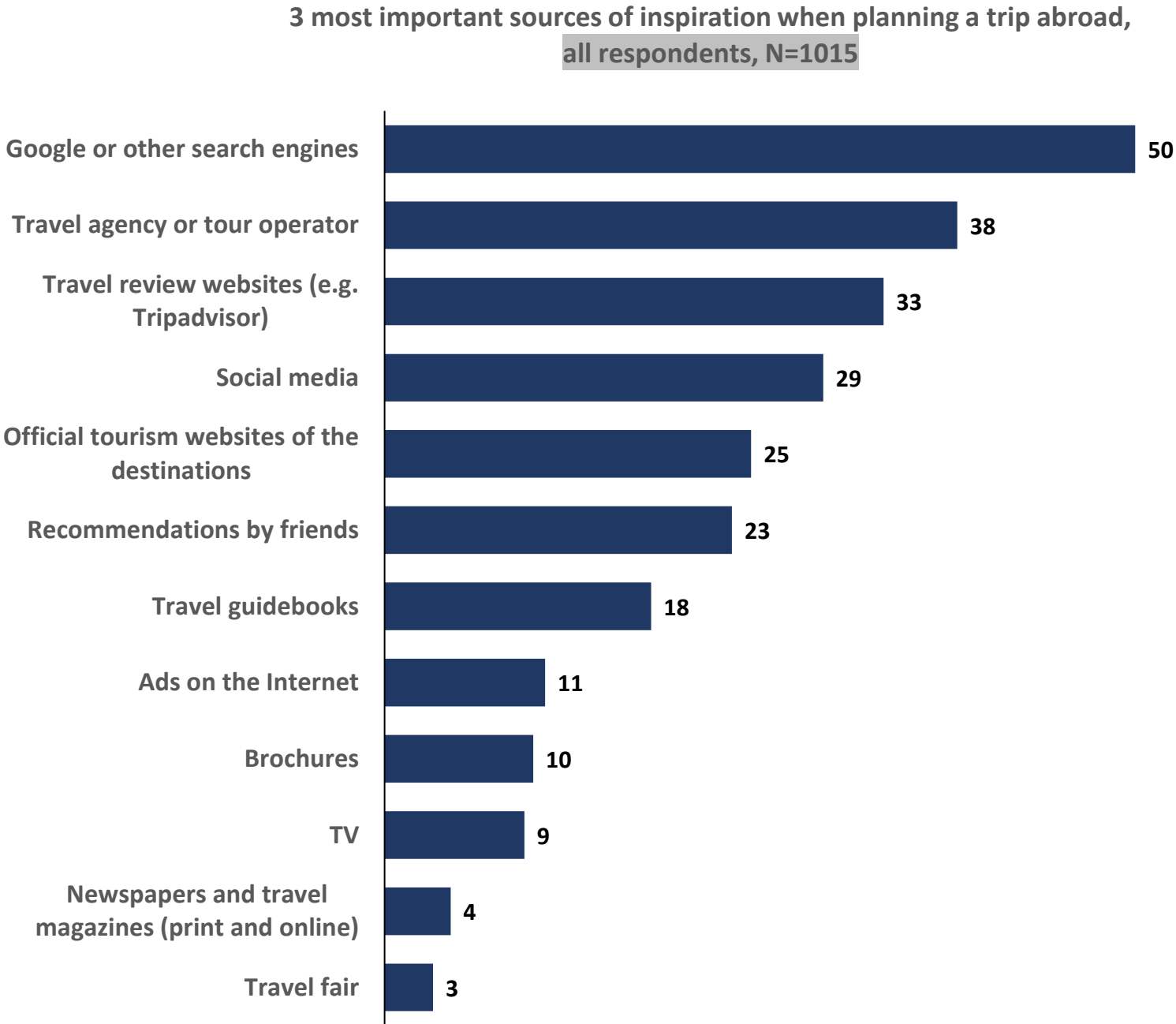
Holiday trips abroad in the next three years

How often do you plan to go on holiday abroad in the next 3 years?
 % of all respondents, N=1015



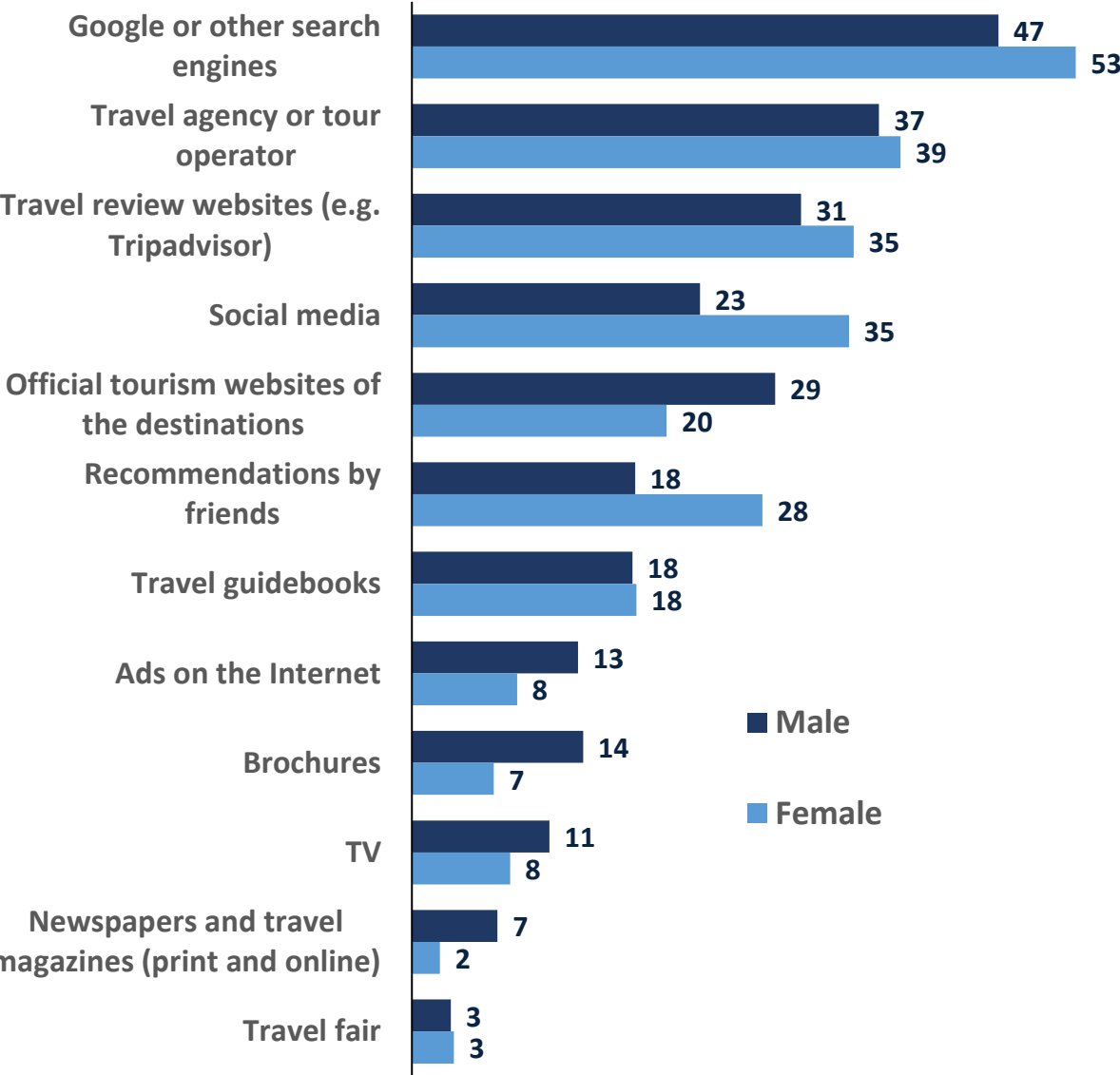
3 most important inspiration sources when planning a trip abroad

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- The younger the age group, the more important is social media for them. The older the age group, the more important are publications for them (travel books, brochures, press). However, even for the oldest age group, publications are not the most important sources (41% of 65-79-year-olds cited search engines (e.g. Google), official websites of destinations and travel agencies among the 3 most important sources; 28% of them said the same about travel books).
- The official tourism websites of destinations are more important for people over 45 (in comparison with younger people).

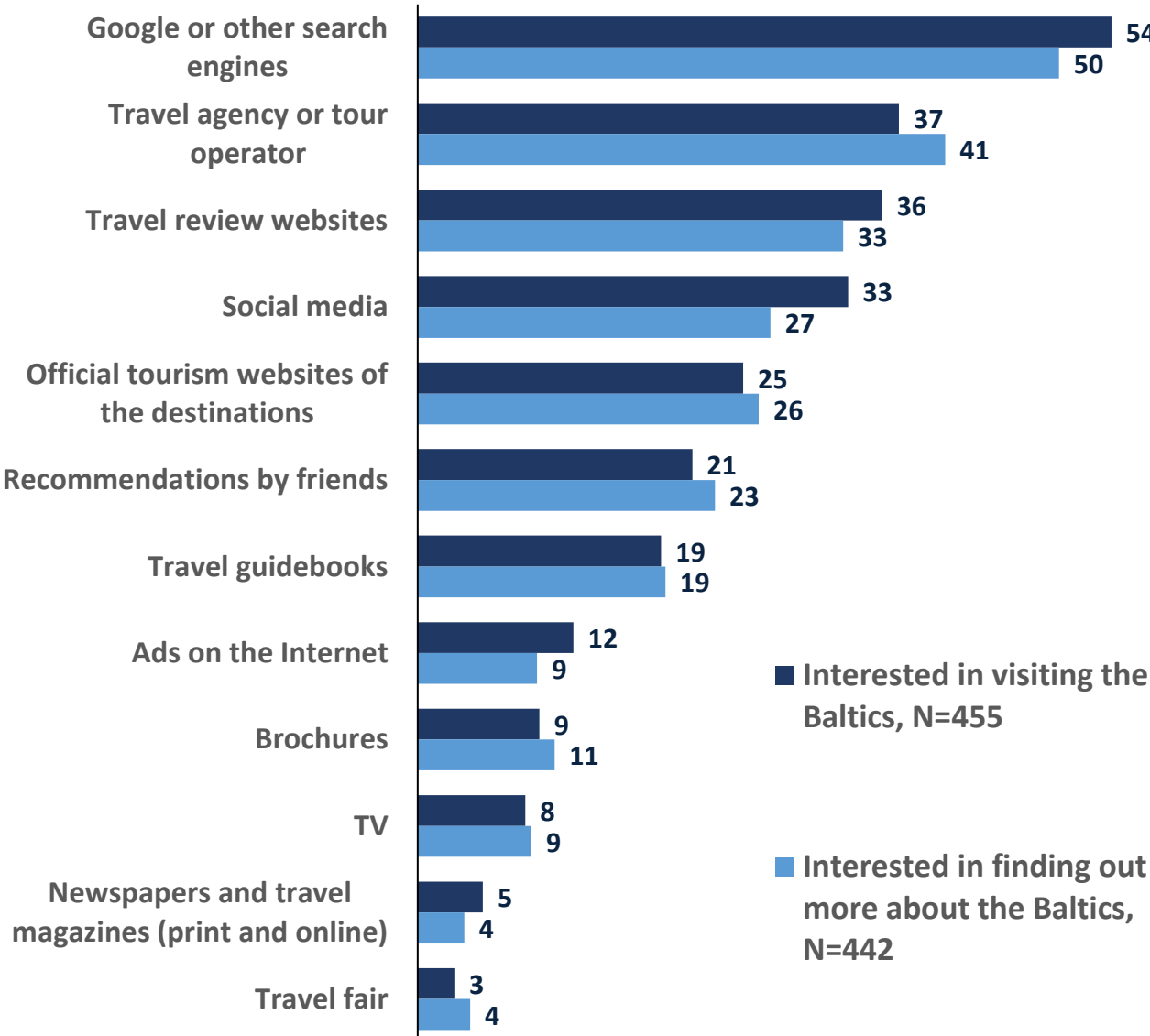


3 most important inspiration sources when planning a trip abroad

All respondents, N=1015



Respondents interested in the Baltics, N=897

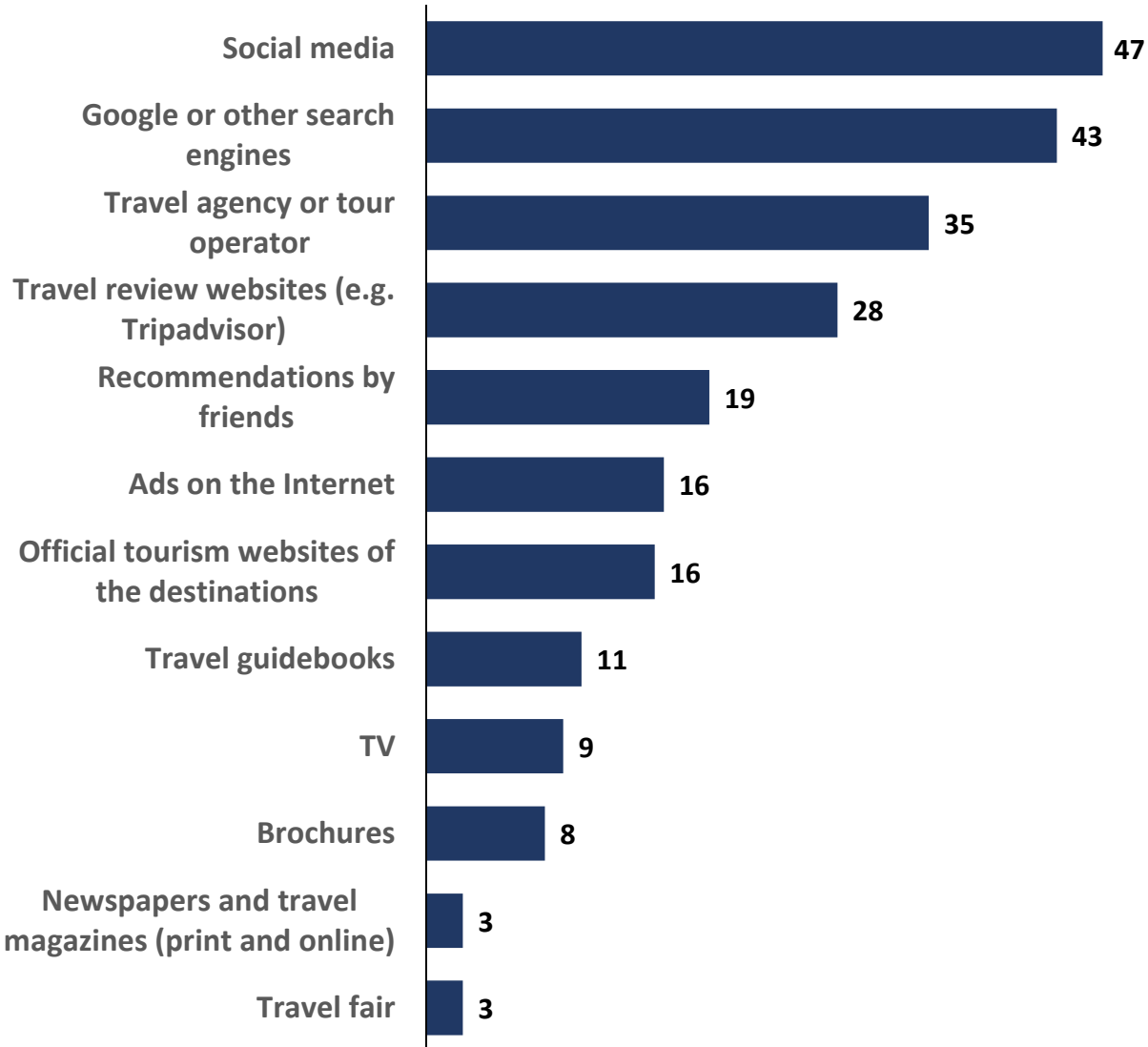


■ Interested in visiting the Baltics, N=455

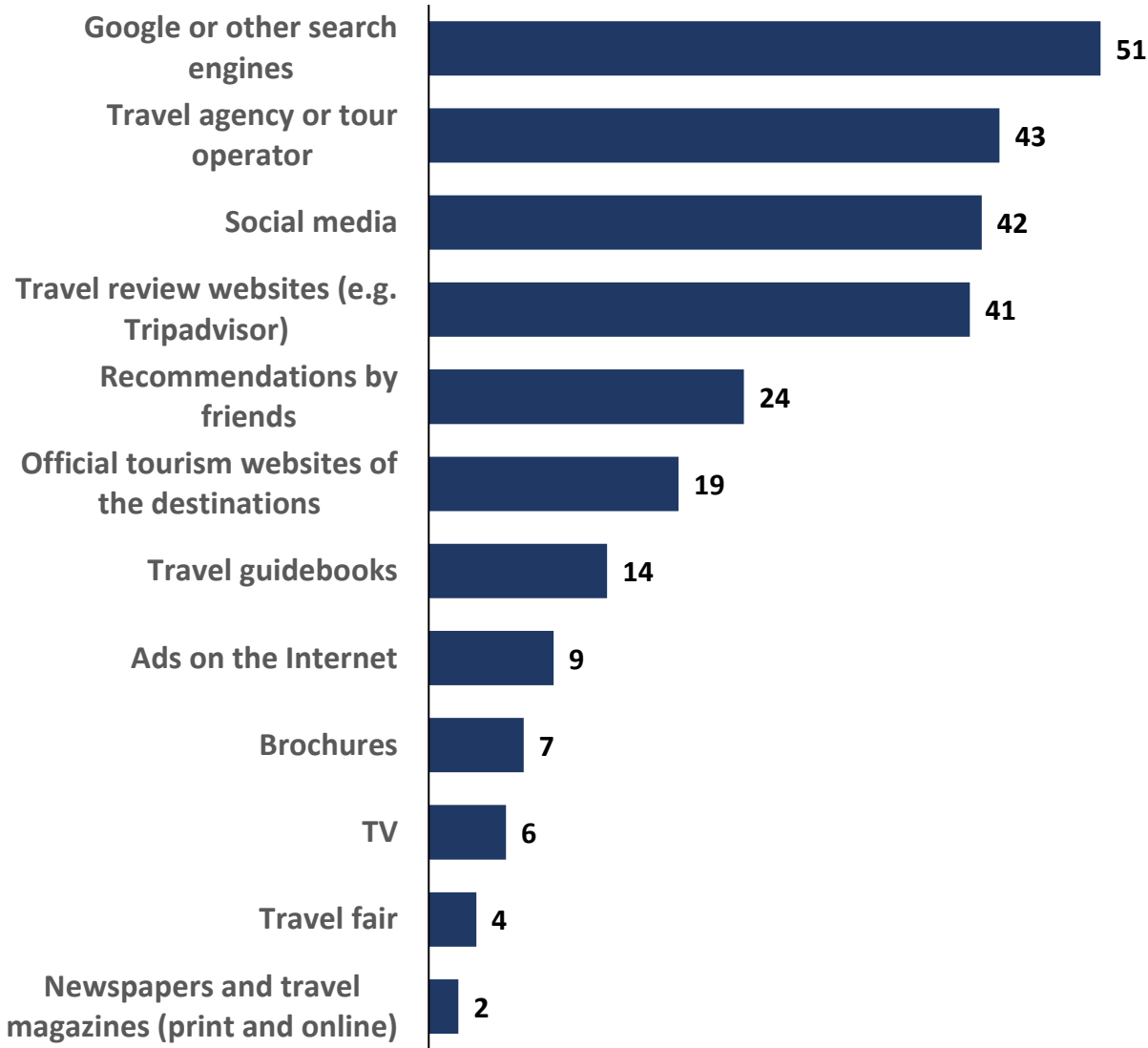
■ Interested in finding out more about the Baltics, N=442

3 most important inspiration sources when planning a trip abroad

Respondents aged 18-24, N=159

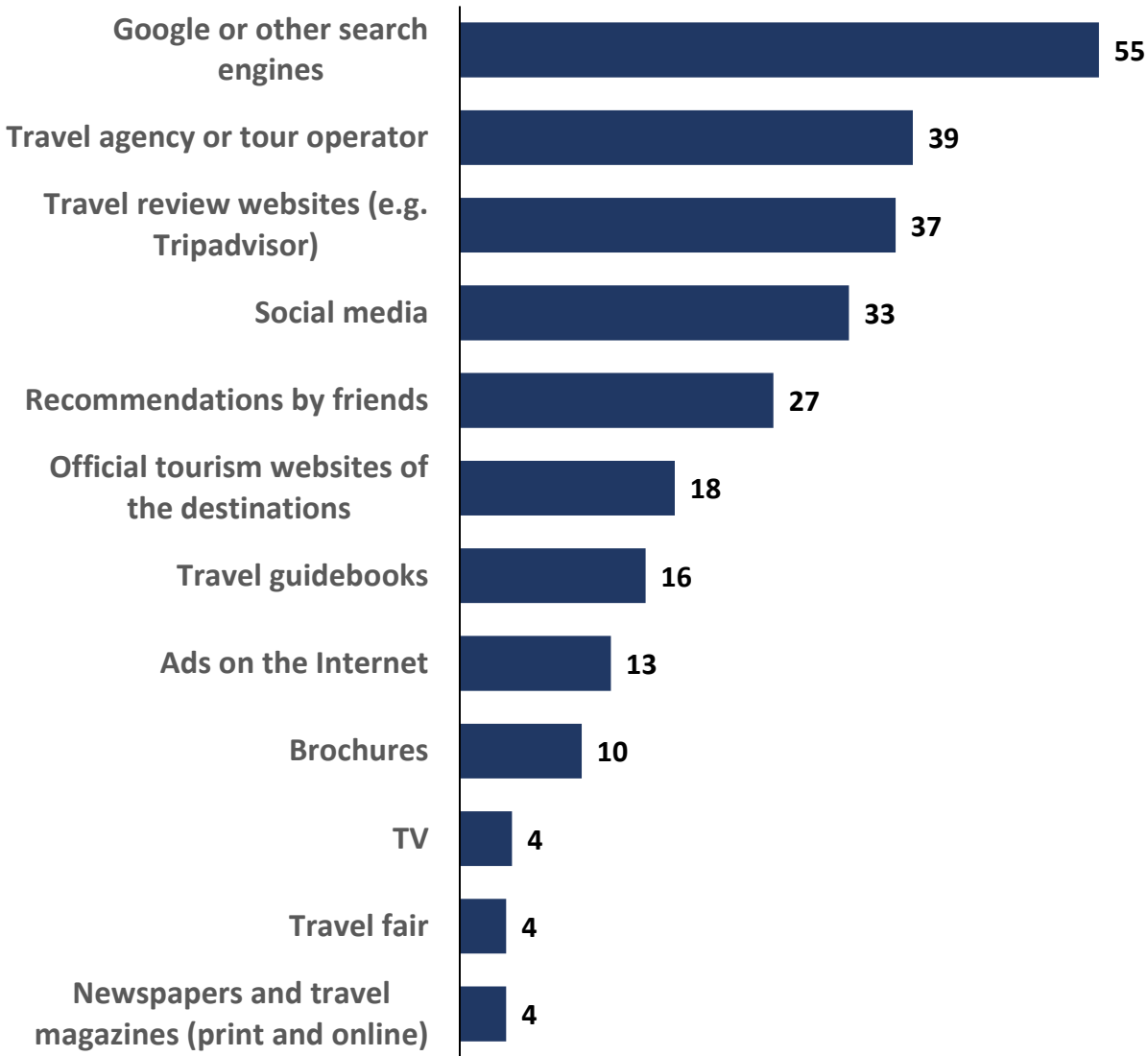


Respondents aged 25-34, N=222

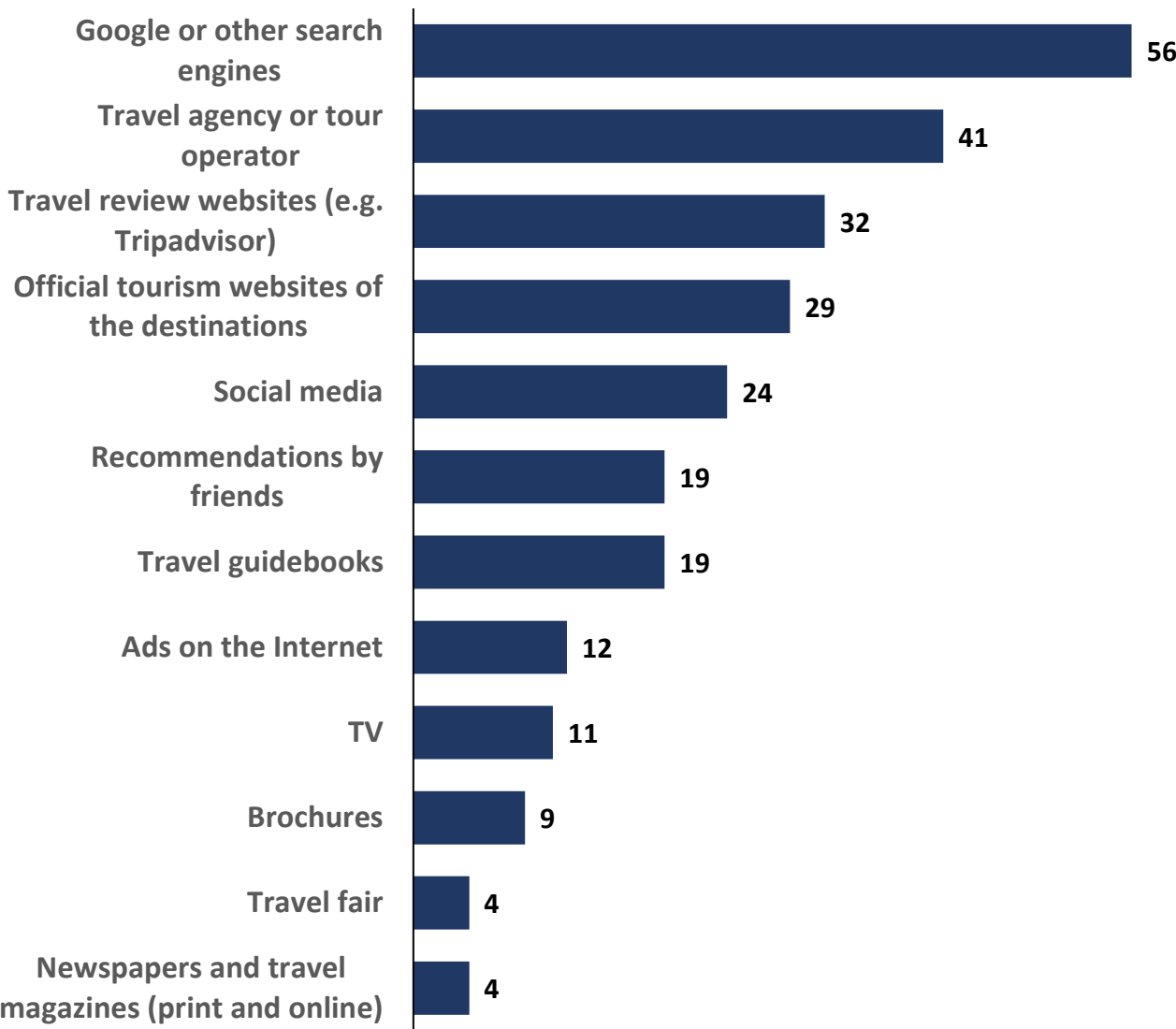


3 most important inspiration sources when planning a trip abroad

Respondents aged 35-44, N=201

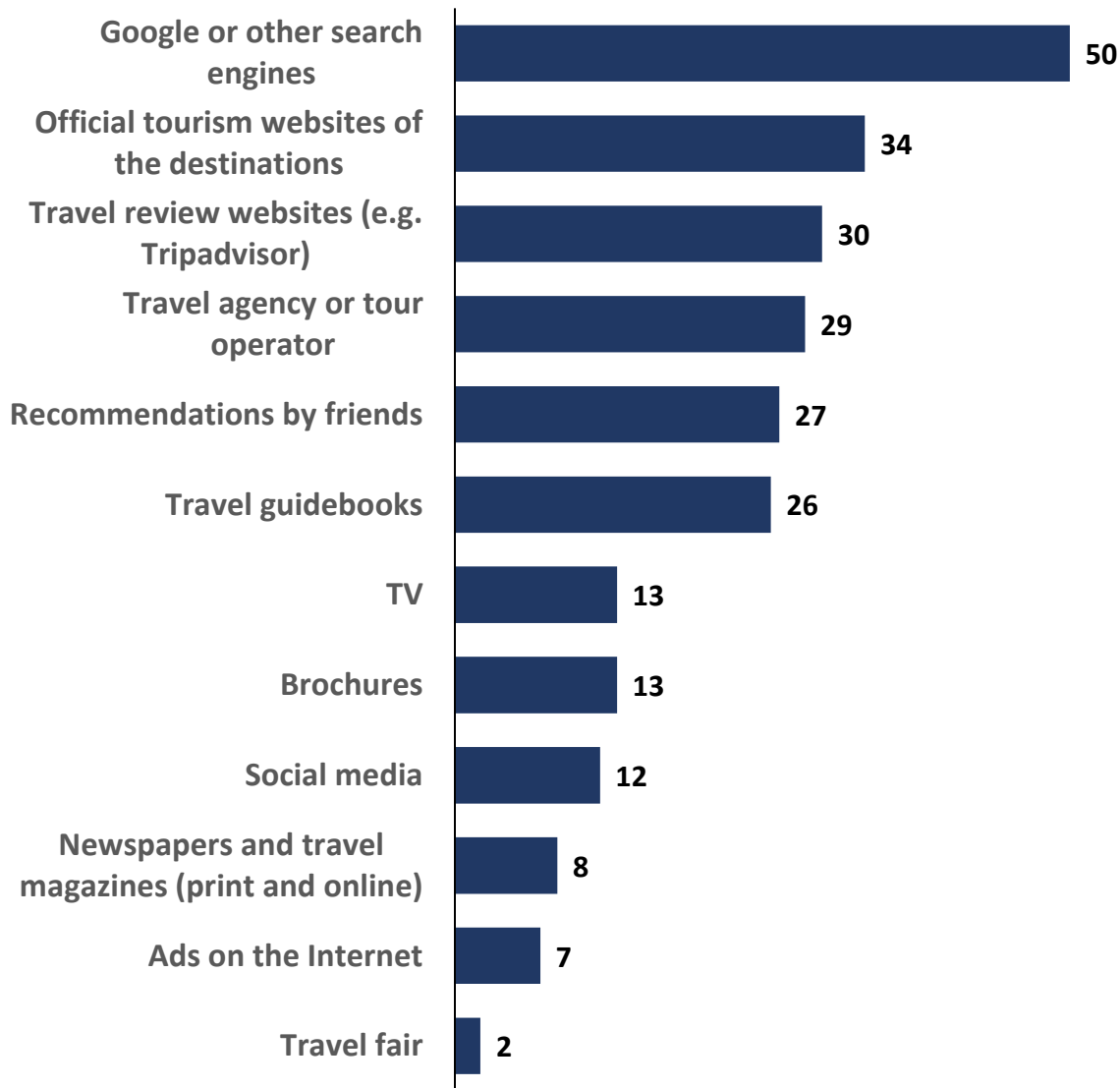


Respondents aged 45-54, N=185

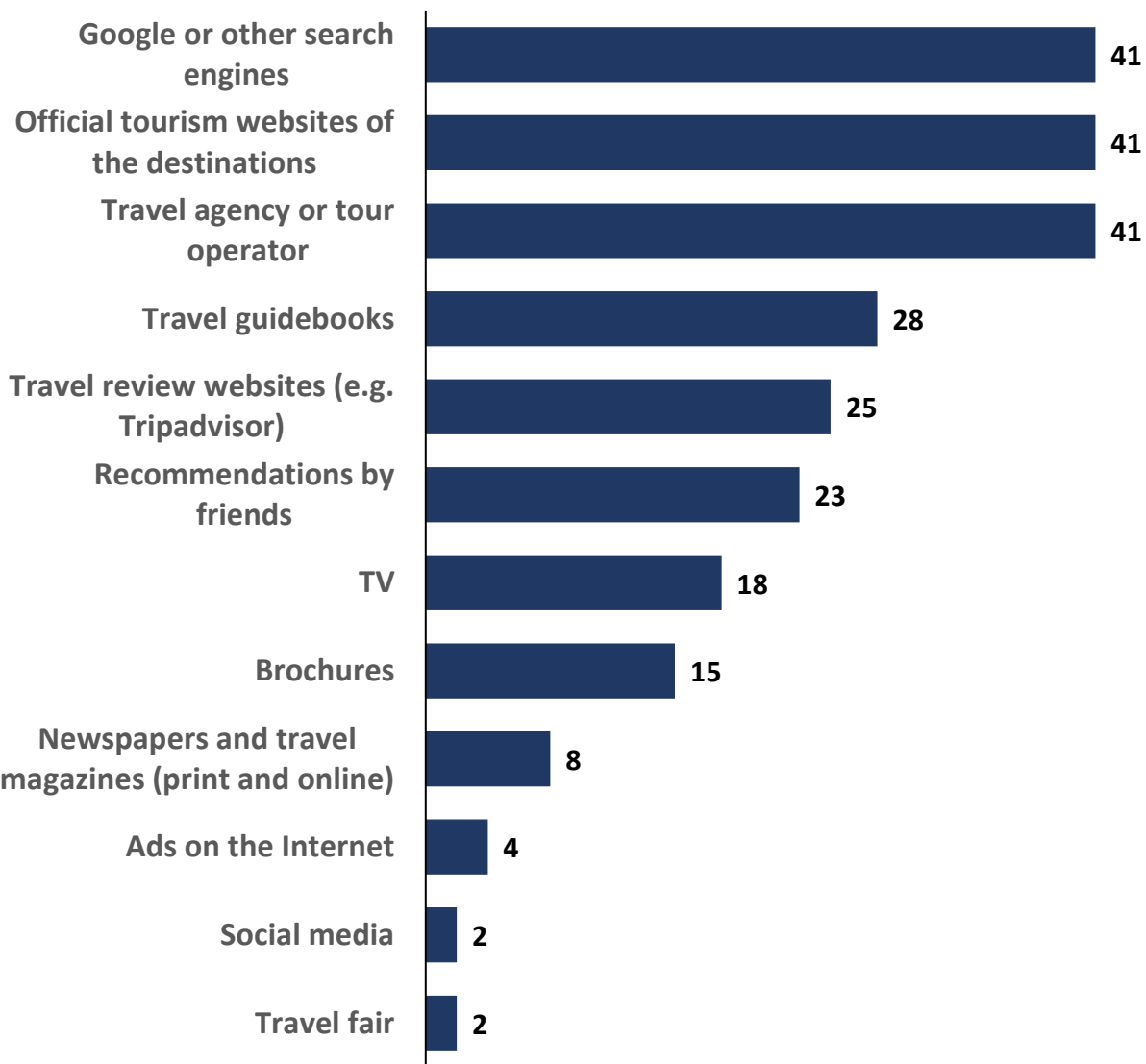


3 most important inspiration sources when planning a trip abroad

Respondents aged 55-64, N=143



Respondents aged 65-79, N=105

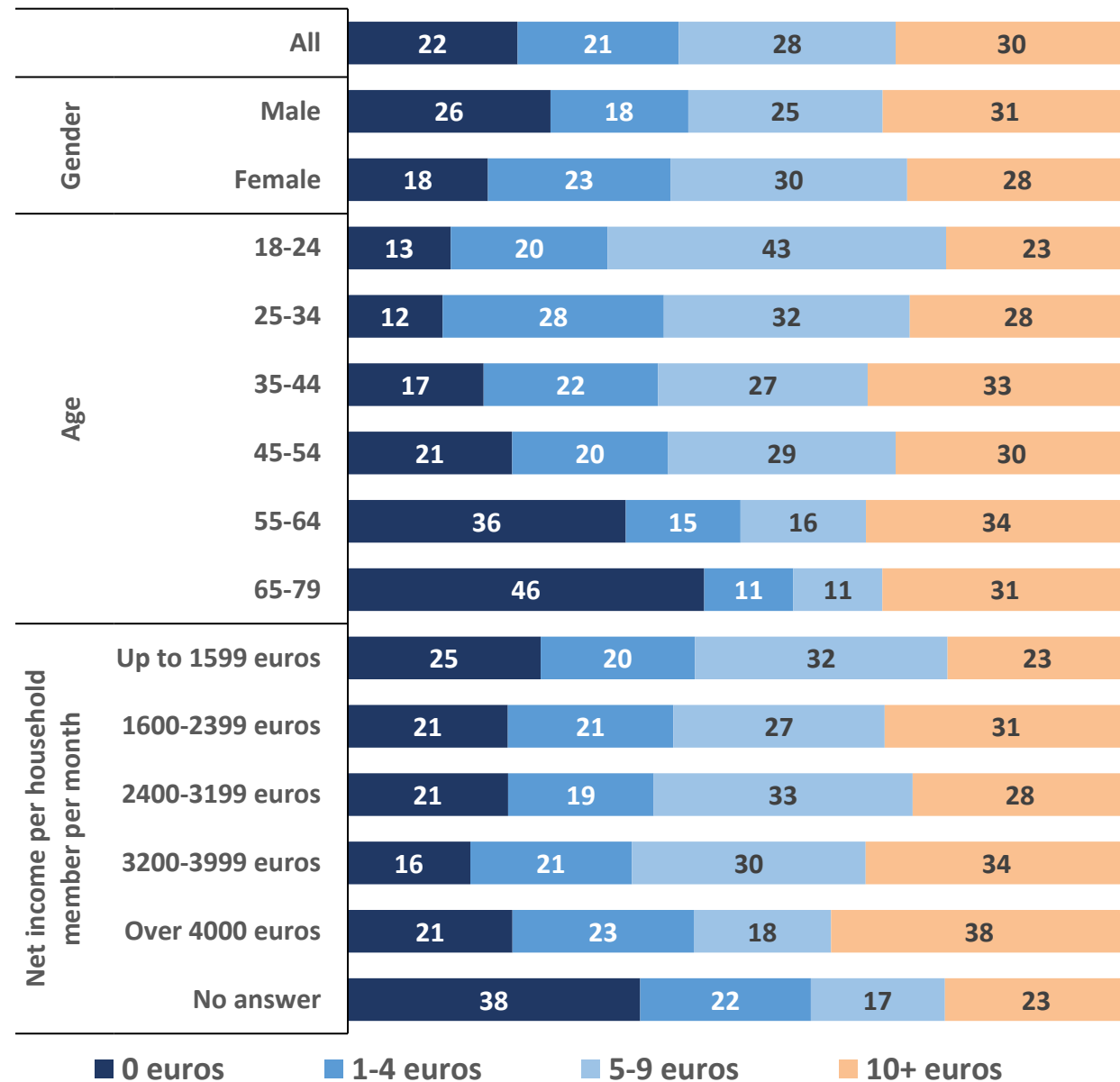


Offsetting CO2 emissions

% of all respondents

- 22% of those surveyed are not ready to offset CO2 emissions at the travel destination
- 21% are ready to donate 1-4 euros, 28% 5-9 euros and 30% 10 or more euros
- The youngest group is ready to donate more than the average (43% 5-9 euros). The oldest group (65-79 years old) is divided into two opposite poles - almost half are not ready to donate anything, while 31% would donate 10+ euros
- Those with a higher income, frequent travelers, those potentially interested in traveling to the Baltics and those who have previously visited Estonia are ready to donate more than the average

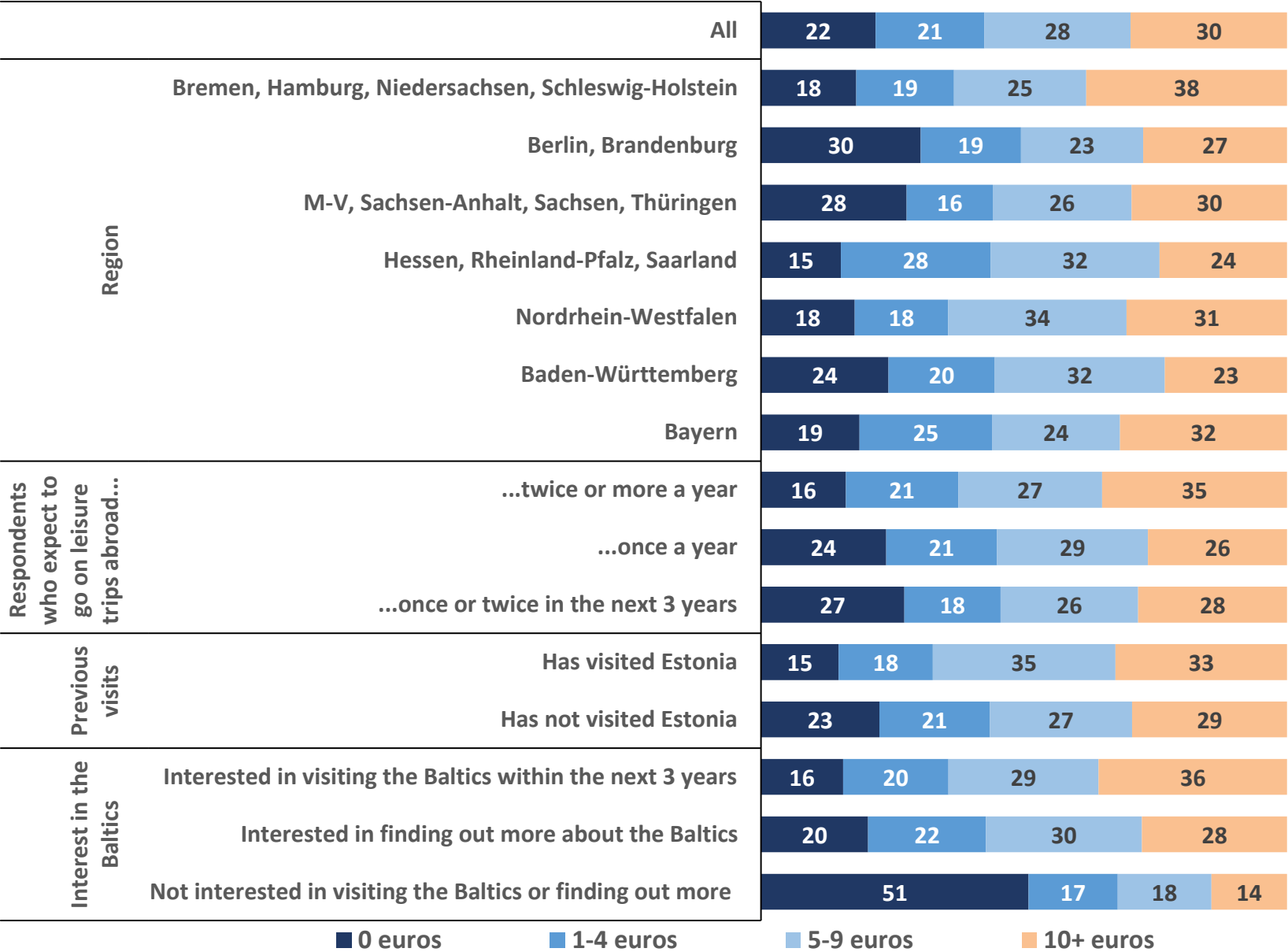
On your next trip abroad, how much are you ready to donate to a sustainable project in your destination to compensate for the ecological footprint (CO2 emissions) of your trip? % of all respondents, N=1015



Offsetting CO2 emissions

% of all respondents

On your next trip abroad, how much are you ready to donate to a sustainable project in your destination to compensate for the ecological footprint (CO2 emissions) of your trip? % of all respondents, N=1015

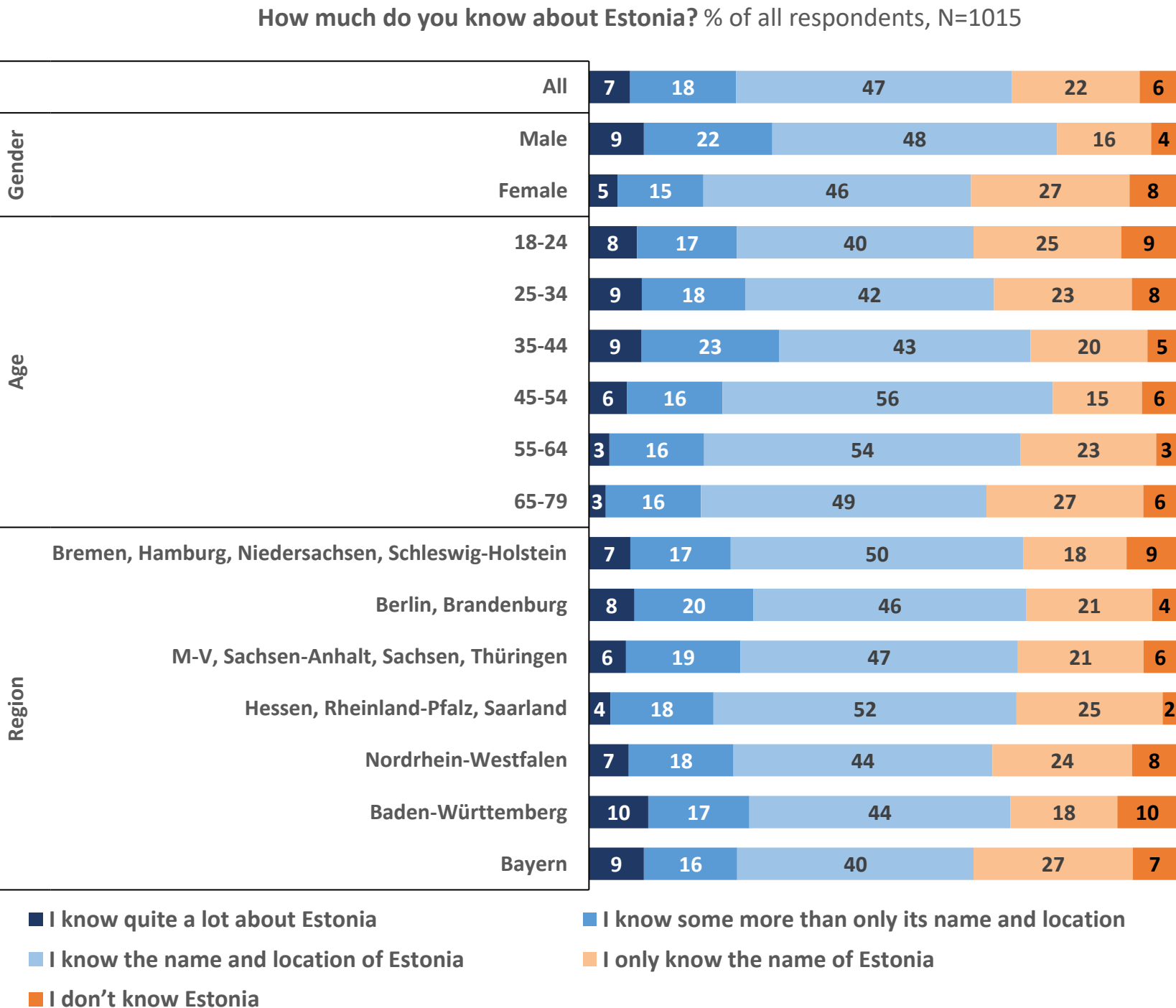


The background of the slide is a dark blue, semi-transparent overlay on a photograph. The photograph shows a pair of black-rimmed glasses and a black pen resting on a document. The document features a bar chart with blue bars of varying heights. Some numbers are visible on the chart, such as 360, 470, and 410. The text on the document is partially legible, including "Business activity of company and subsidiaries" and "Date and progress of work".

Interest in visiting Estonia and the Baltic countries and image of Estonia

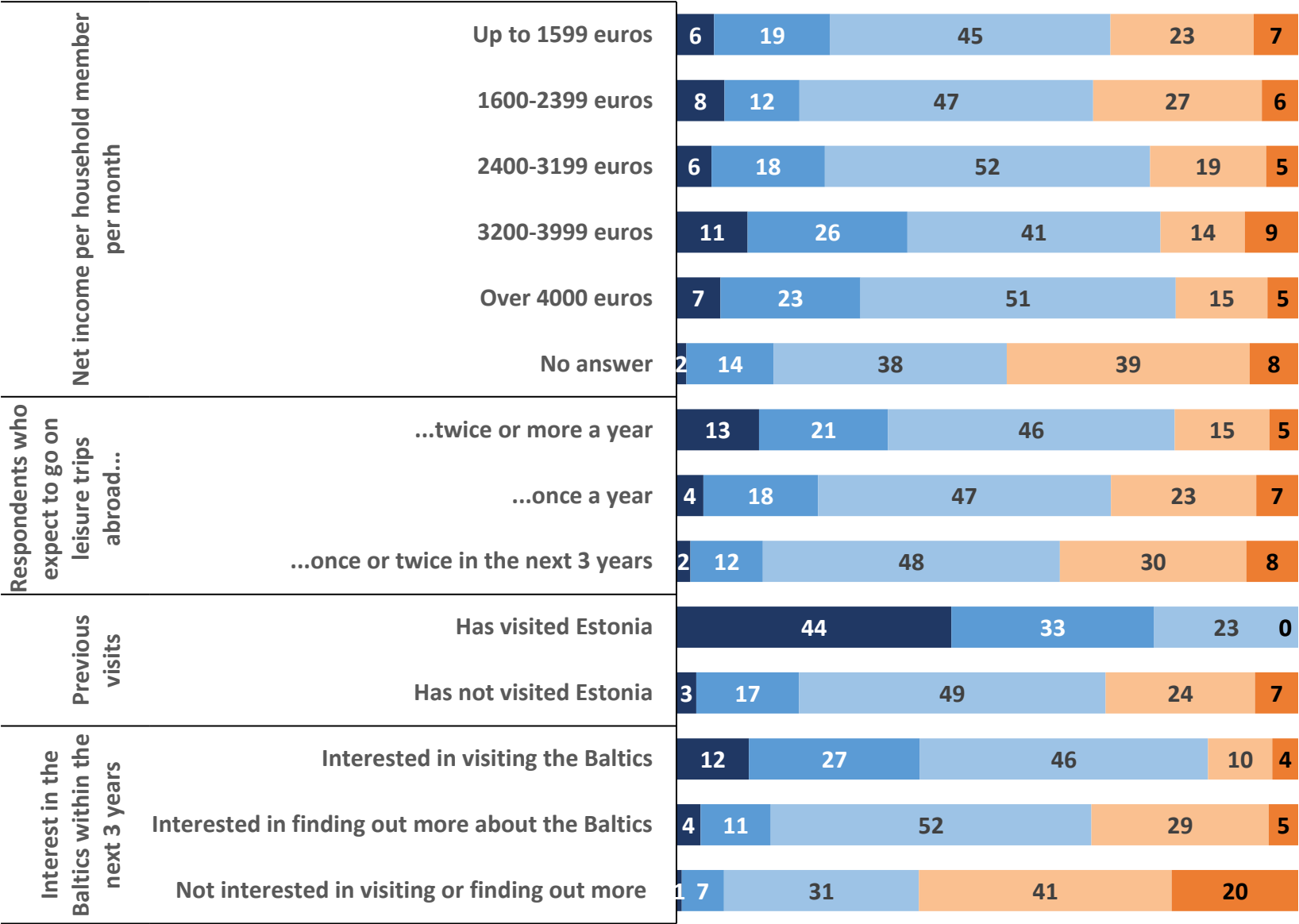
Knowledge about Estonia

- 25% of the target group claim that they know a lot about Estonia, or they know more than just its name and location. 47% only know the name and location of Estonia, and the remaining 28% know less or nothing at all.
- Awareness is slightly higher among men, younger age groups (up to 44), higher income groups, frequent travellers, those who have been to Estonia and those interested in holidaying in the Baltics.



Knowledge about Estonia

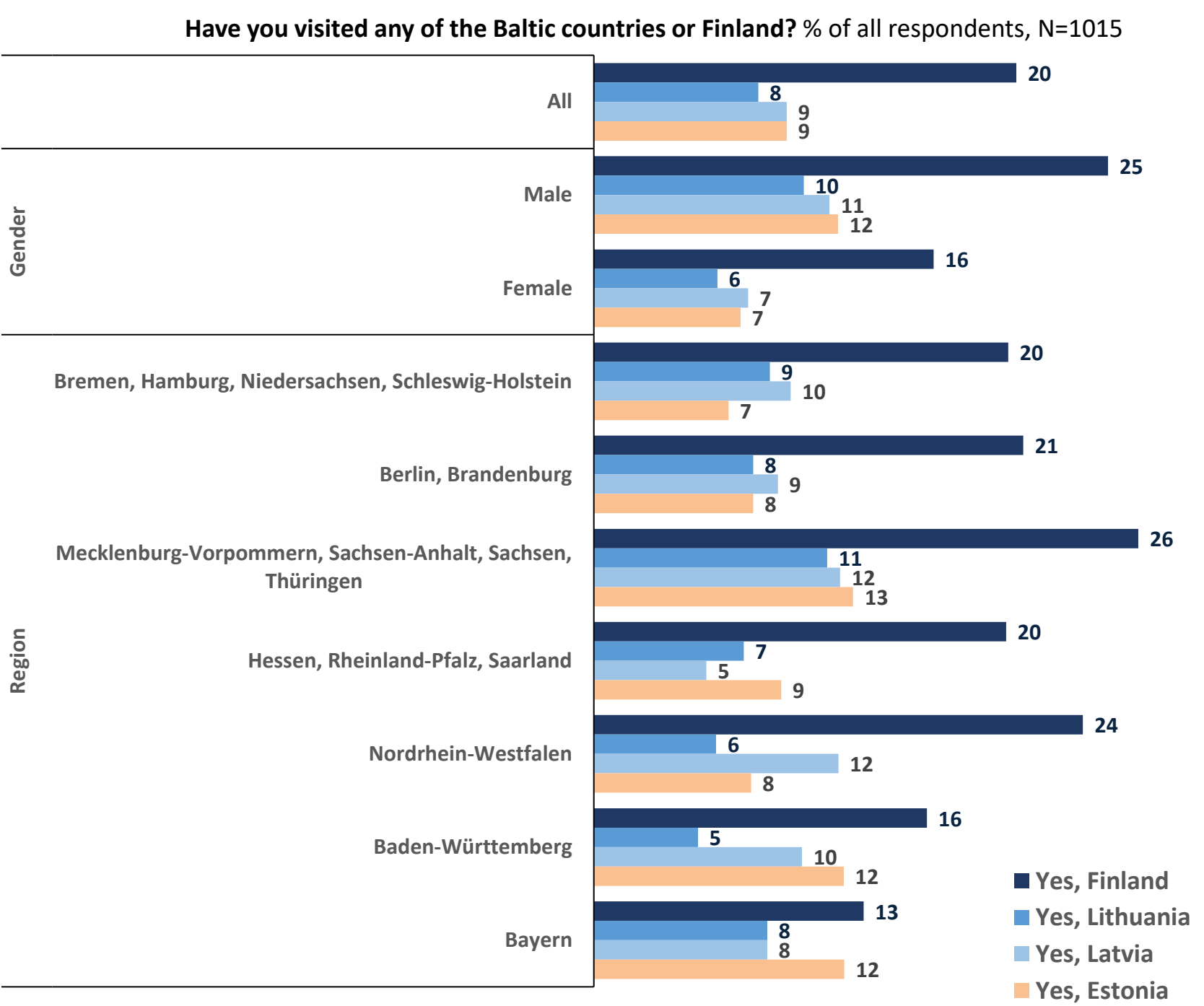
How much do you know about Estonia? % of all respondents, N=1015



- I know quite a lot about Estonia
- I know some more than only its name and location
- I know the name and location of Estonia
- I only know the name of Estonia
- I don't know Estonia

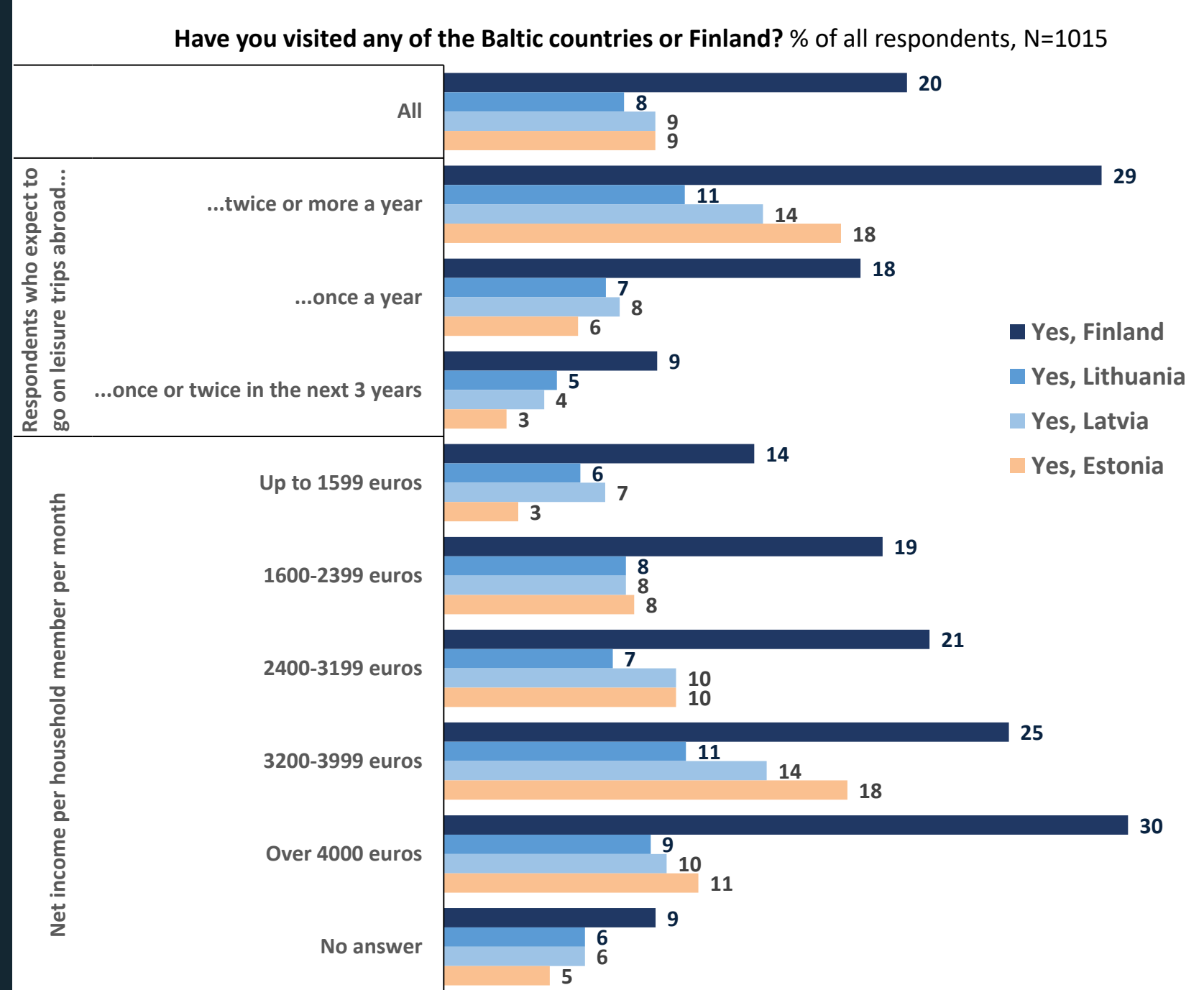
Previous visits to the Baltic countries and Finland

- 20% of the target group have been to Finland, 8-9% to Estonia, Latvia and Lithuania. There are no big differences between the age groups or regions of residence in terms of visiting Estonia.
- Men are more likely to have visited each of these countries than women (probably partly due to the fact that men make more business trips).
- In terms of visiting Estonia, there are no big differences between the regions of residence. However, slightly bigger differences are evident in the case of Finland - among the inhabitants of the southern regions (Bavaria and Baden-Württemberg) there are somewhat fewer people who have visited Finland than among the inhabitants of other regions of Germany.



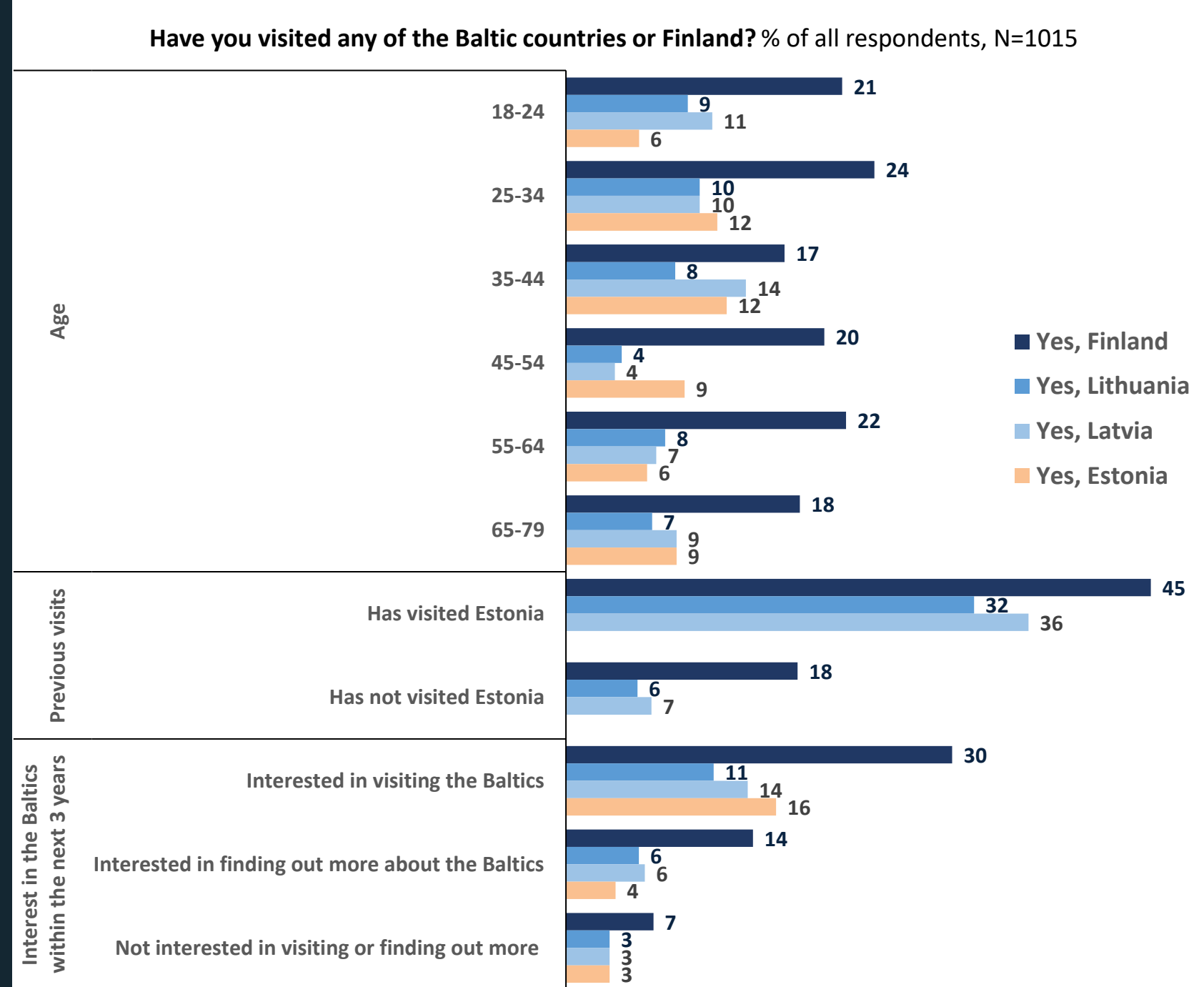
Previous visits to the Baltic countries and Finland

- People who have visited all these countries are more likely to be found among people with higher incomes and among frequent travellers.



Previous visits to the Baltic countries and Finland

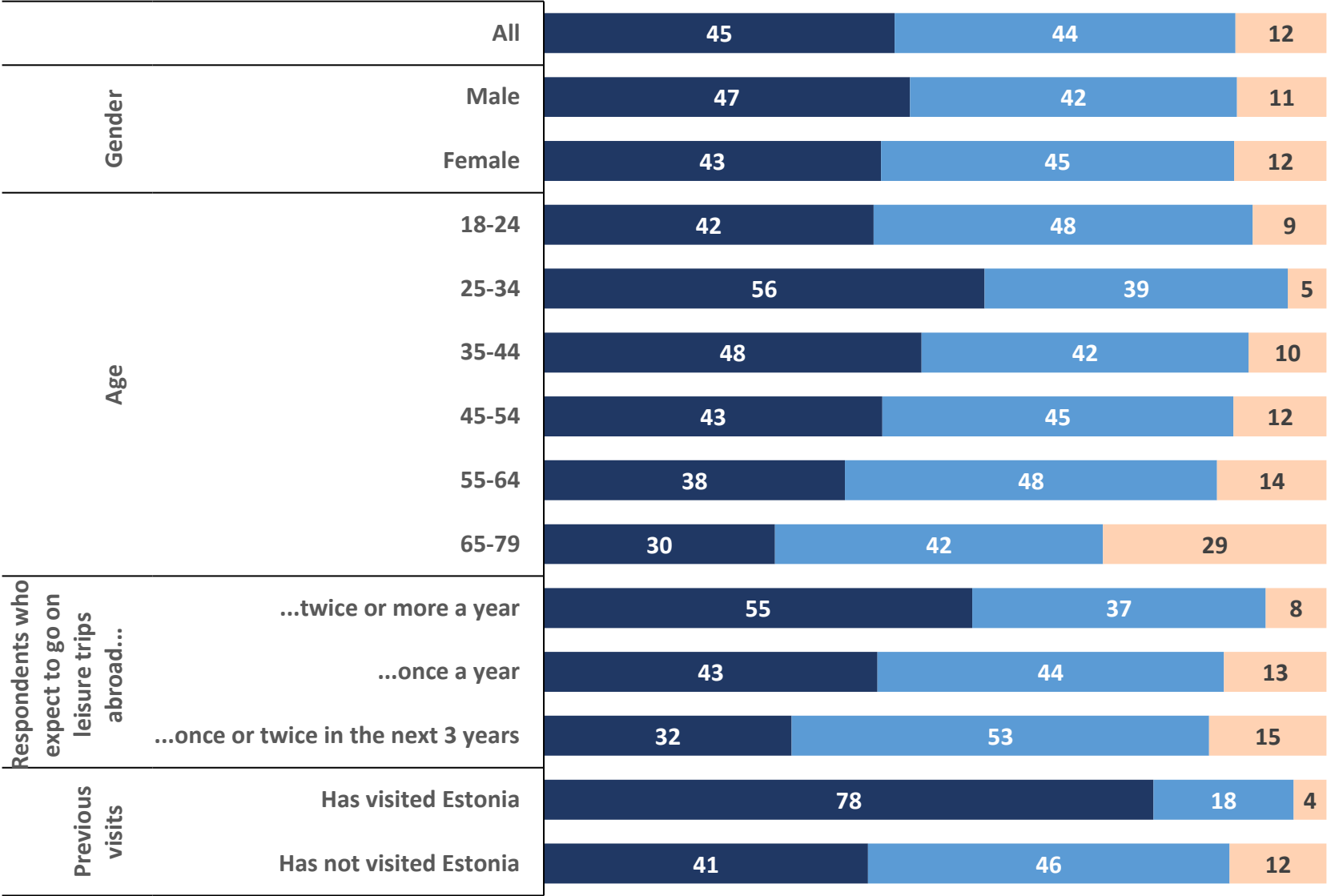
- There are no big differences between the age groups in terms of visiting Estonia.
- 45% of those who have visited Estonia have also been to Finland, 36% have also been to Latvia and 32% to Lithuania. Thus, German residents combine Estonia with a visit to Finland somewhat more than with a visit to other Baltic countries (probably this is related to the fact that some of the respondents have visited Estonia as part of a Baltic Sea cruise, which includes, among others, a visit to Helsinki and Tallinn; also some respondents may have taken a boat trip across the Gulf of Finland when visiting Helsinki or Tallinn).



Interest in visiting the Baltic countries

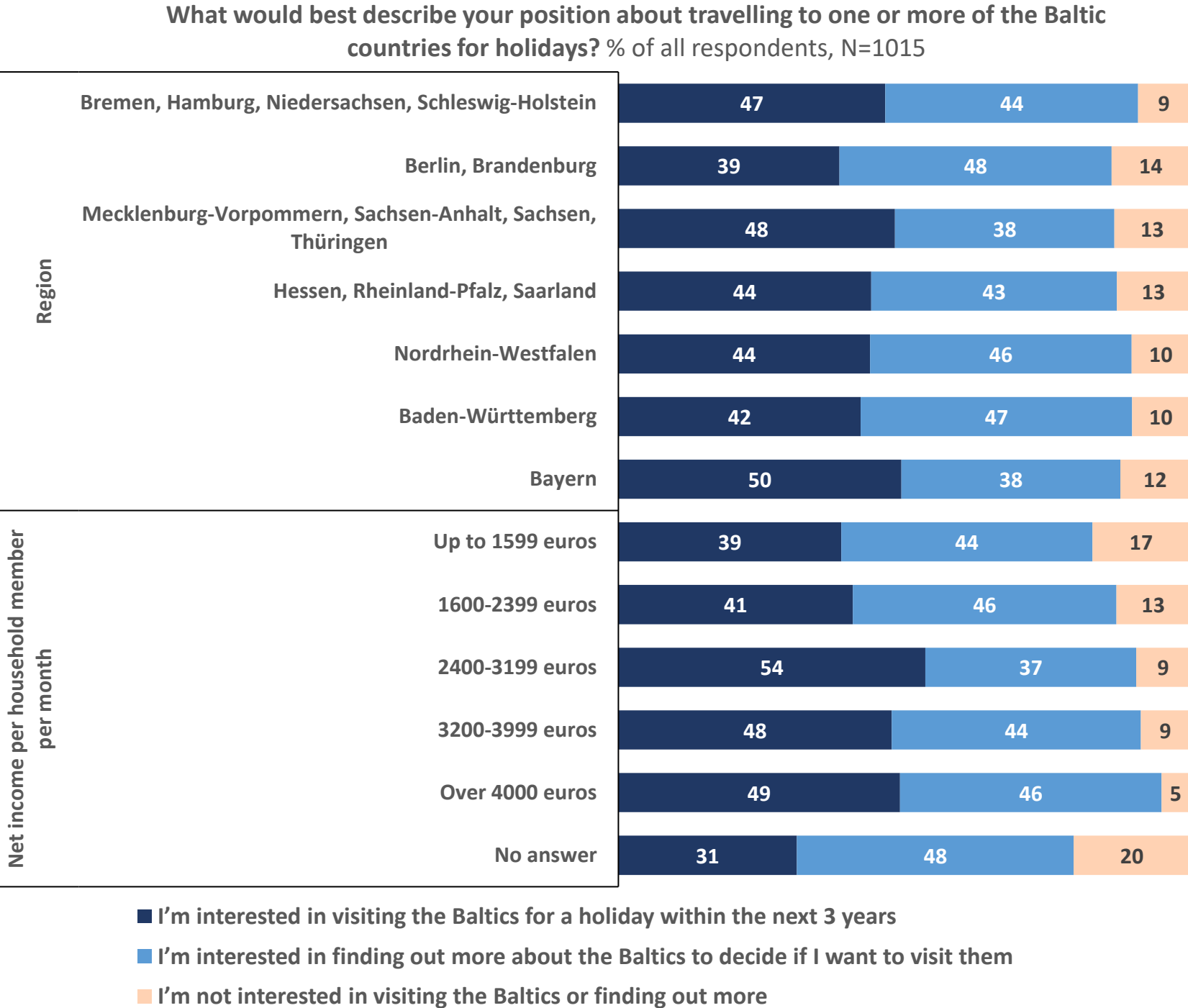
- 45% of the respondents are interested in holidaying in one of the Baltic countries in the next 3 years, 44% are interested in receiving additional information, and 12% are not interested in either option.
- Interest is higher than average among 25–34-year-olds and lowest among older age groups (although they are interested in additional information)
- There is also a higher-than-average interest in holidays in the Baltics among higher income groups and among those who plan 2 or more holiday trips a year.
- 78% of those who have been to Estonia are interested in a holiday trip to the Baltics (compared to 41% of those who have not been to Estonia).

What would best describe your position about travelling to one or more of the Baltic countries for holidays? % of all respondents, N=1015



■ I'm interested in visiting the Baltics for a holiday within the next 3 years
■ I'm interested in finding out more about the Baltics to decide if I want to visit them
■ I'm not interested in visiting the Baltics or finding out more

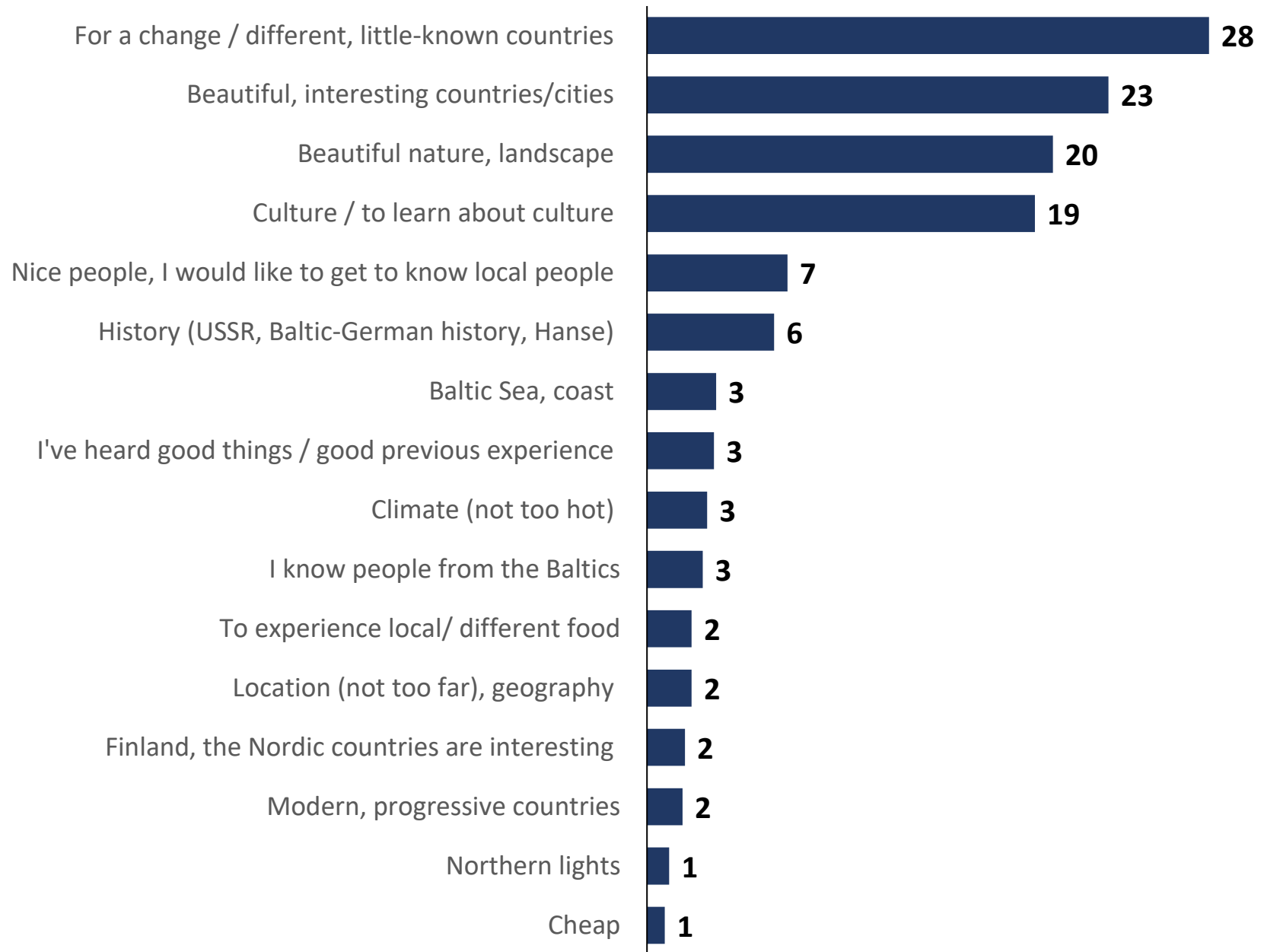
Interest in visiting the Baltic countries



Why would you be interested in the Baltic countries? (open question)

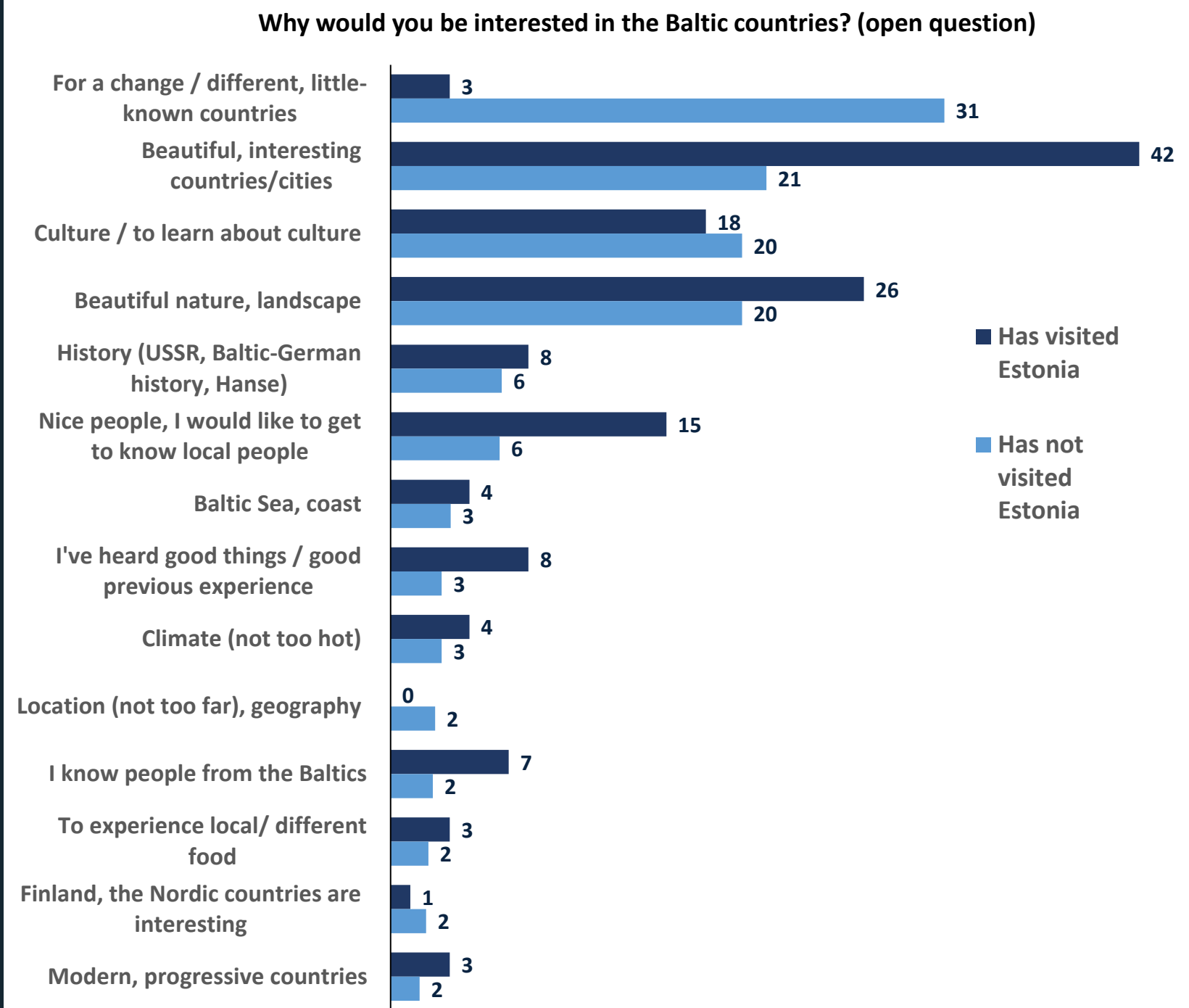
- 28% of those who are interested in the Baltic States cited as a reason of interest the fact that they like to travel and discover new places and would like to visit the Baltic States for a change, because these are little known, something new and different.
- 23% stated that these are beautiful, interesting countries/cities. 1/5 mentioned beautiful nature, 1/5 interest in culture.
- 7% named pleasant people / the desire to get to know people, 6% mentioned interesting history (USSR, Baltic-German history, Hanseatic League).
- History is more interesting for older age groups: of 18-44-year-olds only 2% mentioned it, compared to 1/10 of 45-64-year-olds, and 21% of 65-79-year-olds.

Why would you be interested in the Baltic countries? (open question) % of respondents who are interested in visiting or finding out more, N=897



Why would you be interested in the Baltic countries? (open question)

- 42% of the respondents who have already visited Estonia stated that these are beautiful/interesting cities/countries, they simply like these countries.
- 26% of those who have already visited Estonia named the beautiful nature, 18% named the culture / the desire to get to know the culture, and 15% named the pleasant people.



Why would you be interested in the Baltic countries? (open question)

Examples of open-ended responses

- Wegen der hanseatischen Historie des Baltikums
- Es gibt dort einige historisch wichtige Orte und eine schöne Landschaft.
- Postsowjetische Staaten finde ich sehr interessant.
- Alte deutsche gebiete
- Es hat etwas Heimisches, da ich selbst in einer Hansestadt wohne
- Die wechselvolle Geschichte unter diversen Fremdherrschaften, seine europäische Kultur
- Sie haben eine interessante Vergangenheit, da sie in der Hanse waren, und sind die Tigerstaaten des ehemaligen Ostblocks.
- Ich würde gerne diese fortschrittlichen Staaten kennenlernen. Und aufgrund der Landschaft und Kultur.
- Weil diese Staaten modern, aber auch traditionell sind
- Die Ziele sind nicht weit weg und haben Schöne Ecken.
- Schöne Städte, vielseitige Kultur
- Es sind interessante orte, schöne Städte, hübsche Strände, interessante Kultur
- Auf Bildern sieht es sehr schön aus und es ist eine neue Kultur, die ich gerne kennenlernen möchte
- Ich habe gehört, dass es sehr schön sein soll dort. Nicht so touristisch überlaufen. Und ich mag die nordischen Länder
- Schöne Küsten und gutes Wetter, Jette Menschen, viel Kultur.
- Es ist im Sommer weniger heiß und die Landschaften und Städte gefallen mir.
- Sind ruhige Länder mit toller Natur und toller Kultur

Why would you be interested in the Baltic countries? (open question)

Examples of open-ended responses

- Es ist noch eine unberührte Natur vorhanden, es ist im Sommer auch nicht so heiß. Die vielen Flüsse und Burgen, die Städte mit ihren Sehenswürdigkeiten und die interessante Geschichte lädt zum Reisen ein.
- Ich würde gerne mal Polarlichter sehen und gehe davon aus, dass man diese dort auch sehen könnte.
- Klima, Kultur, Essen, Lage, Freundlichkeit, Städte, Menschen.
- Im Sommer ist es nicht so erdrückend heiß, jedoch ist es trotzdem lang hell und im Winter ist es dort ziemlich kalt. Das macht es in zusätzlichem Anbetracht, dass sie mit dem Auto erreichbar sind, ziemlich attraktiv.
- Die Natur ist unberührt. Schöne und altertümliche Städte. Bietet eine Auszeit abseits von Touristenmassen.
- Die Landschaft sieht in den Dokumentationen immer so schön aus!
- Die schönen Landschaften und die Kultur sind sehr sehenswert, vor allem die Preise sind sehr niedrig.
- Tolle Landschaften und keine Millionenstädte.
- einzigartige Kultur, Entwicklung nach Verlassen der SU, soll sehr nett sein.
- Andere Kulturen sind interessant.
- Da sie kulturell sehr vielfältig ist und es eine Menge zu erkunden gibt.
- Es wäre mal interessant eine neue Kultur zu erleben.
- Es ist ein interessanter Kulturraum, insbesondere mit Bezügen zu deutschen Wurzeln.
- Mich interessiert die Kultur dieser Staaten, die Landschaften inklusive der Küsten und die technische Entwicklung.
- Die Ostseeküste soll dort sehr schön sein.
- Ich mag Länder, die am Wasser liegen und eine andere Natur als unsere bieten und ich mag kältere Gegenden.
- Sind gut per Kreuzfahrt zu erreichen.

Why would you be interested in the Baltic countries? (open question)

Examples of open-ended responses

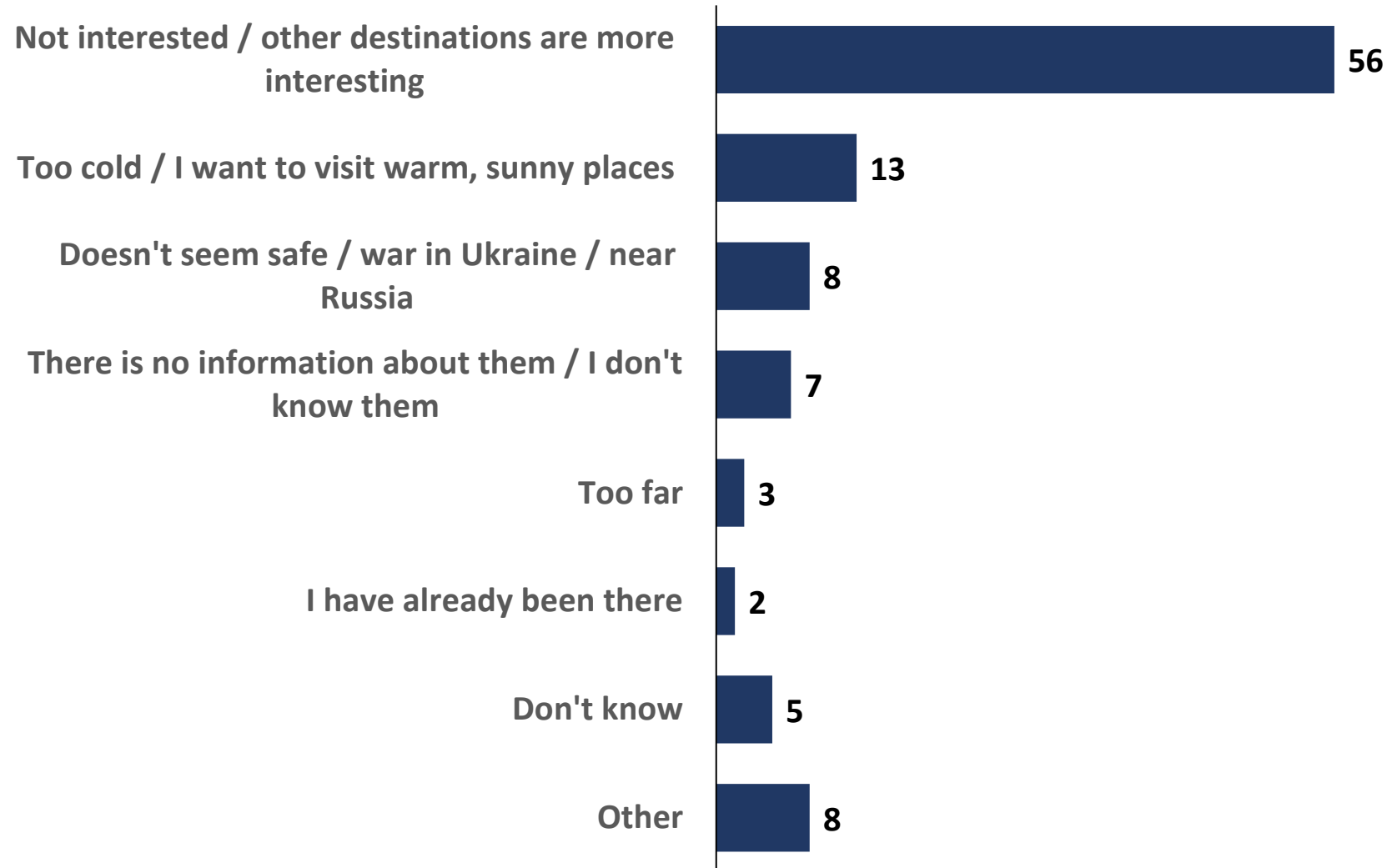
- Ich interessiere mich generell für Osteuropa. Kultur etc.
- Weil ich dort noch nie war, aber viele sagen, dass es dort sehr schön sein soll. Deshalb möchte ich dort auch mal hin.
- Viel Positives gehört, Partner war schon dort und begeistert.
- Ähnlich wie die skandinavischen Staaten die mir gefallen.
- Ich habe noch keinen Ort im Baltikum besucht, und bin generell interessiert, neue Regionen und Orte kennen zu lernen.
- Andere, noch mir unbekannte Länder, sind immer lohnenswert zu besuchen. Ich möchte die Menschen und ihre Lebensweise kennenlernen. Außerdem gehören die baltischen Staaten auch zur deutschen Geschichte, wenn auch in langer zurückliegender Zeit.
- Weil ich noch nie dort war und mich generell für andere Länder und Kulturen interessiere.
- Nicht überlaufen, gutes Klima, bezahlbar.
- Ich interessiere mich für alle Länder der Erde und möchte am liebsten bis zum Lebensende so viele wie möglich sehen, also warum nicht auch baltische Staaten, auch wenn ich andere Länder sicher präferieren würde.
- Einfach in Erfahrung zu sammeln Neue Kulturen kennen lernen deshalb reise ich so gerne egal in welches Land.
- Ich war noch nie in dieser Region. Ich interessiere mich an die Kultur, die Küche und die Natur.
- Ich liebe es generell zu reisen. Jegliche Orte außerhalb von Deutschland erscheinen mir als interessant. Es ist auch ein Urlaubsort, den nicht viele kennen.
- Mich interessiert jedes Stückchen Erde.
- Es ist Neuland für mich, mit einer besonderen und eigenen Kultur.

Why would you not be interested in the Baltic countries? (open question)

- Those who are not interested in the Baltics, say in the open question that there are more interesting destinations which they prefer to visit (56%). 13% say they prefer warm countries.
- 8% mention a lack of security (war in Ukraine or proximity to Russia). All those who mentioned this reason were over 45 years old).
- 7% mention that they don't have enough information about the Baltics or don't know anything about them at all.
- Among others, several personal reasons (e.g. lack of money, health problems) were coded under other reasons.

Why would you not be interested in the Baltic countries? (open question)

% of respondents who are not interested in the Baltics, N=118



Why would you not be interested in the Baltic countries? (open question)

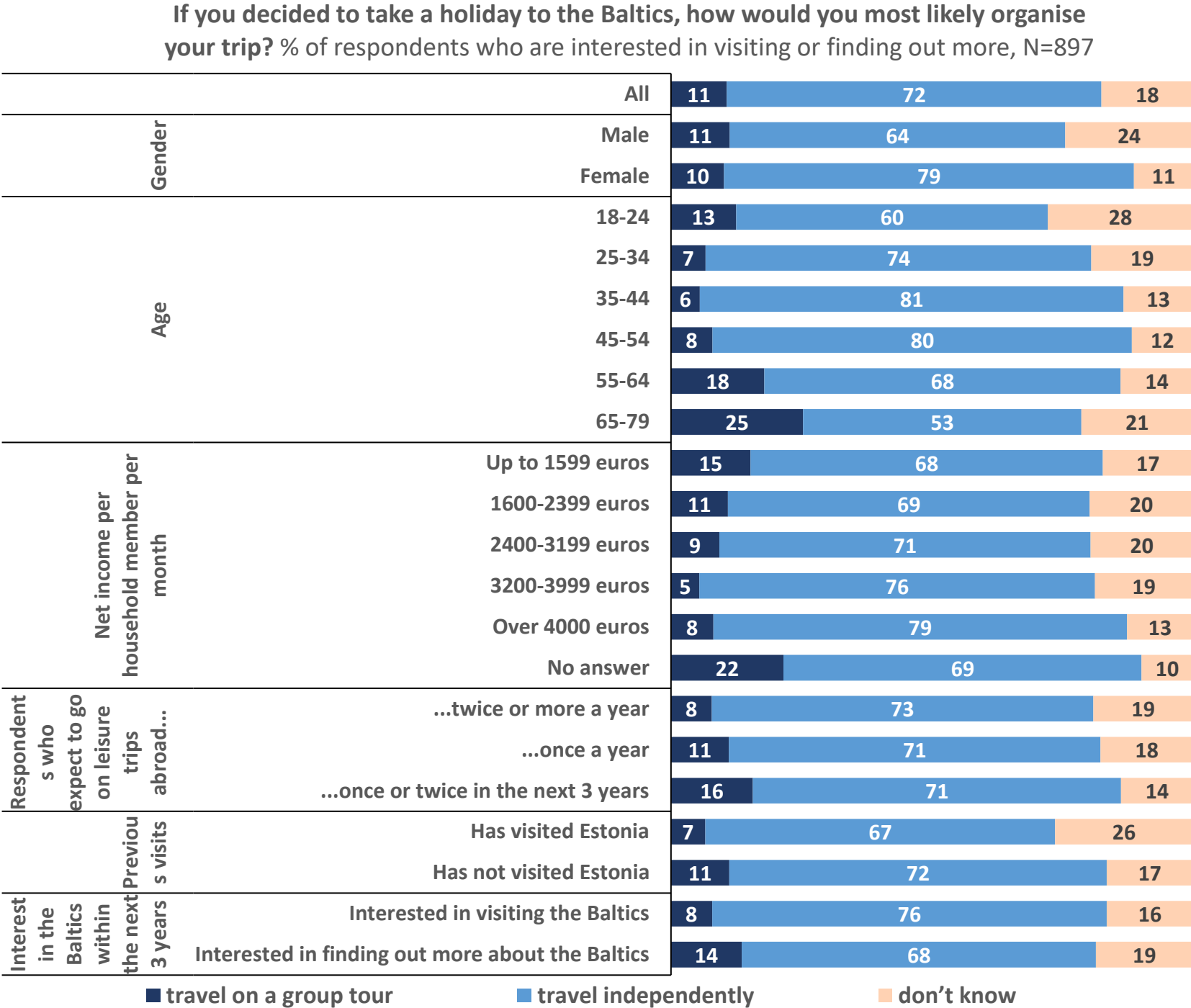
Examples of open-ended responses

- Weil ich es nicht kenne
- Kenne ich nicht
- Ich weiß zu wenig darüber und es interessiert mich auch nicht.
- Ich denke Sie sind nicht interessant.
- Ich bevorzuge Südeuropa.
- Bleibe lieber in westeuropäischen Ländern
- Weil ich andere Länder schöner finde und diese erst mal bereisen möchte
- Andere Ländervorlieben
- Andere Länder interessieren mich mehr
- Möchte zuerst andere Länder kennenlernen
- Ich mag Osteuropa nicht.
- Mag die Gegend nicht
- Kein Interesse, interessiere mich mehr für Skandinavien
- Zu nördlich
- Ist mir zu kalt
- Ich liebe warmes Meerwasser und Sonne
- War schon mal da
- Ich unternehme keine Flugreisen.
- Zu unsichere Lage
- Zu Nahem an Russland
- Sicherheitsbedenken
- Solange der Krieg in der Ukraine tobt, habe ich kein Interesse an den baltischen Staaten

The preferred mode of travel when visiting the Baltic countries

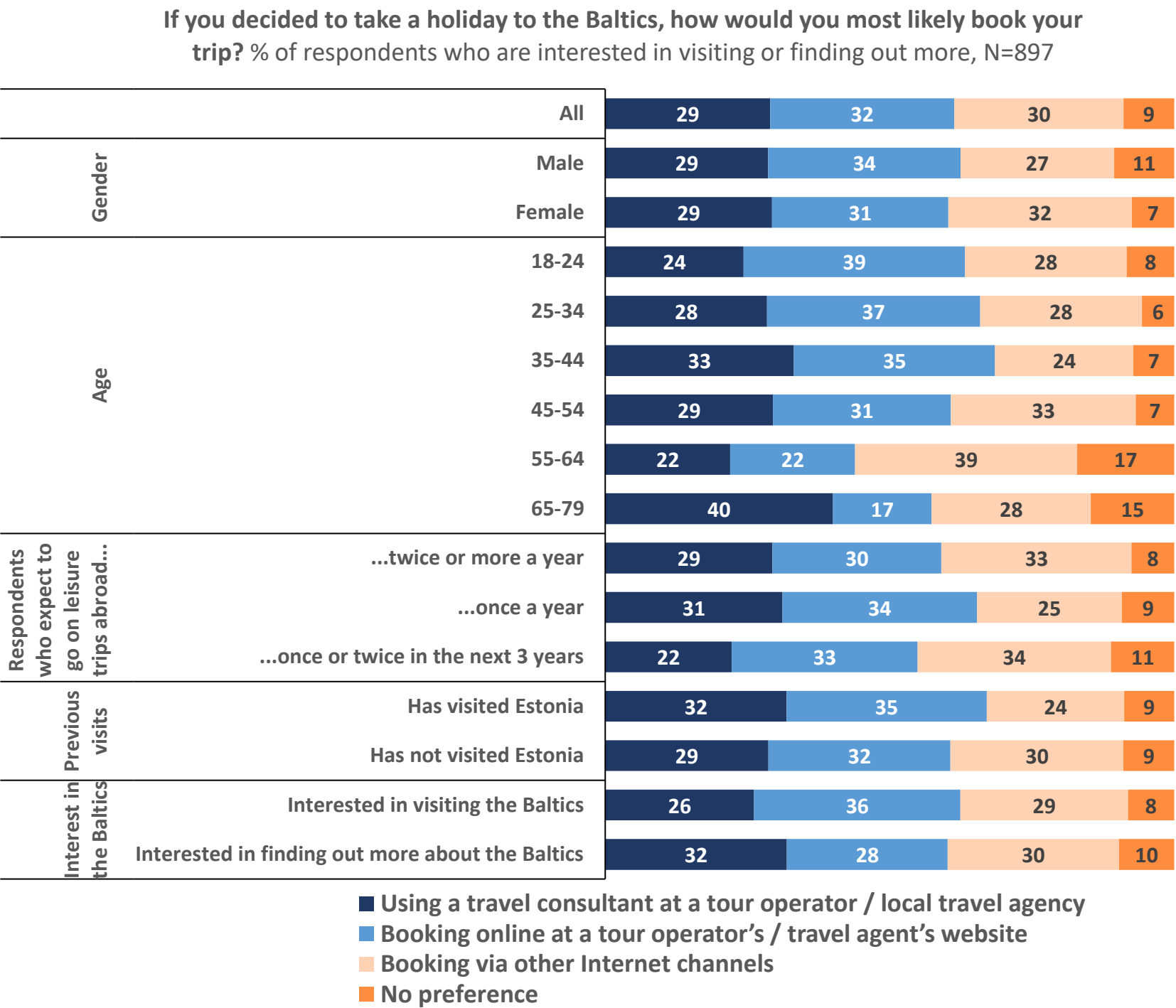
% of respondents who are interested in visiting the Baltics in the next three years or finding out more, N=897

- If one decides to visit the Baltic countries, the preferred way to travel would be independent travel (72%). 11% prefer a group tour.
- The preference for group travel is higher than average among older age groups, in the lower income groups and among those who travel abroad less frequently.
- There are no big differences between the regions of residence.



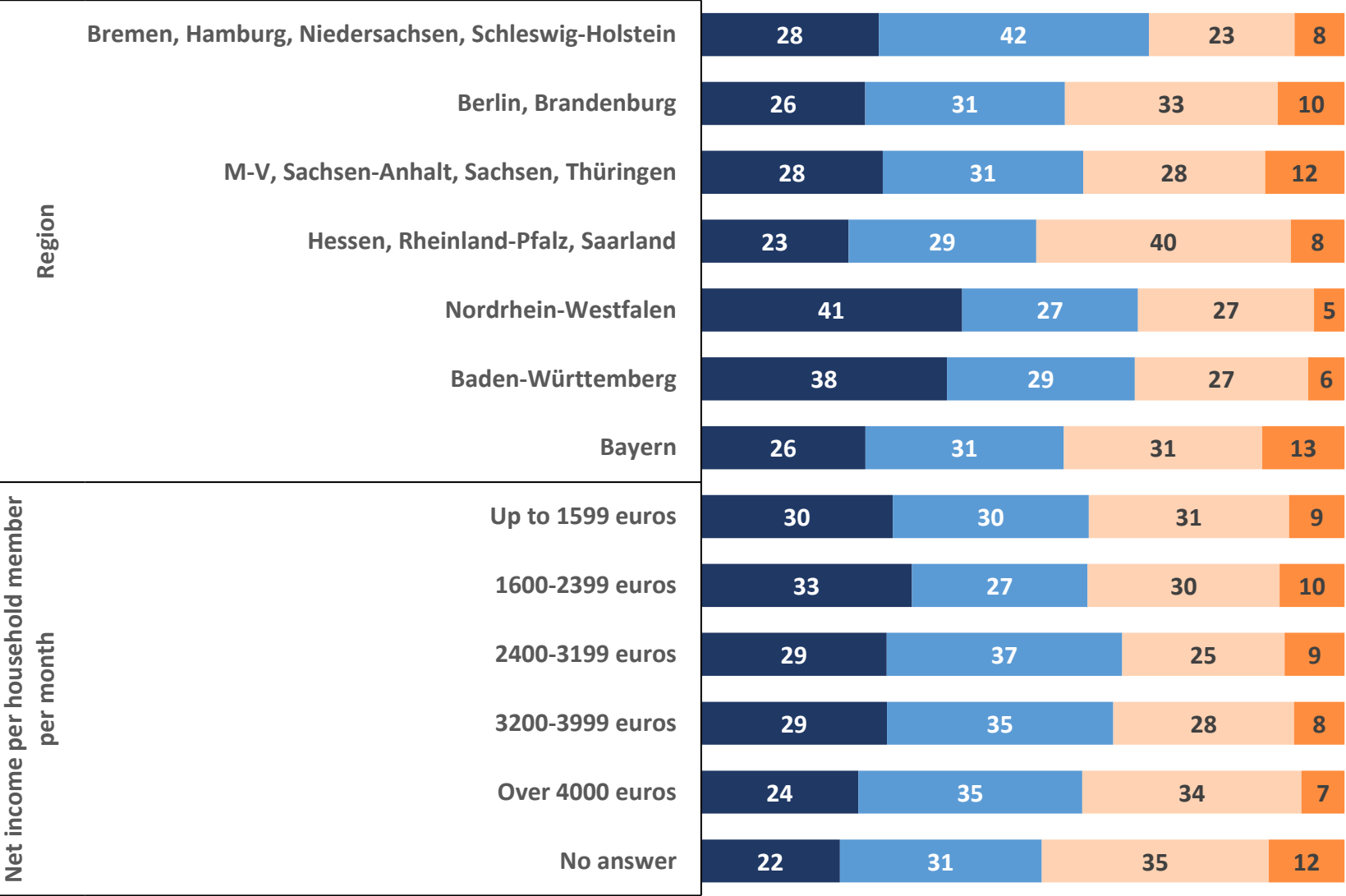
Booking the trip to the Baltics

- When traveling to the Baltics, the preferences for the booking method are fairly evenly divided among 3 options: online on a tour operator's website (32%), through another online booking channel (30%) and using a travel consultant of a local travel agency (29%).
- Younger age groups have a higher preference for the websites of tour operators/ travel agencies, while 40% of those aged 65-79 prefer a travel consultant.
- The preferences of those who have been to Estonia before and those who have not visited Estonia are not significantly different.



Booking the trip to the Baltics

If you decided to take a holiday to the Baltics, how would you most likely book your trip? % of respondents who are interested in visiting or finding out more, N=897



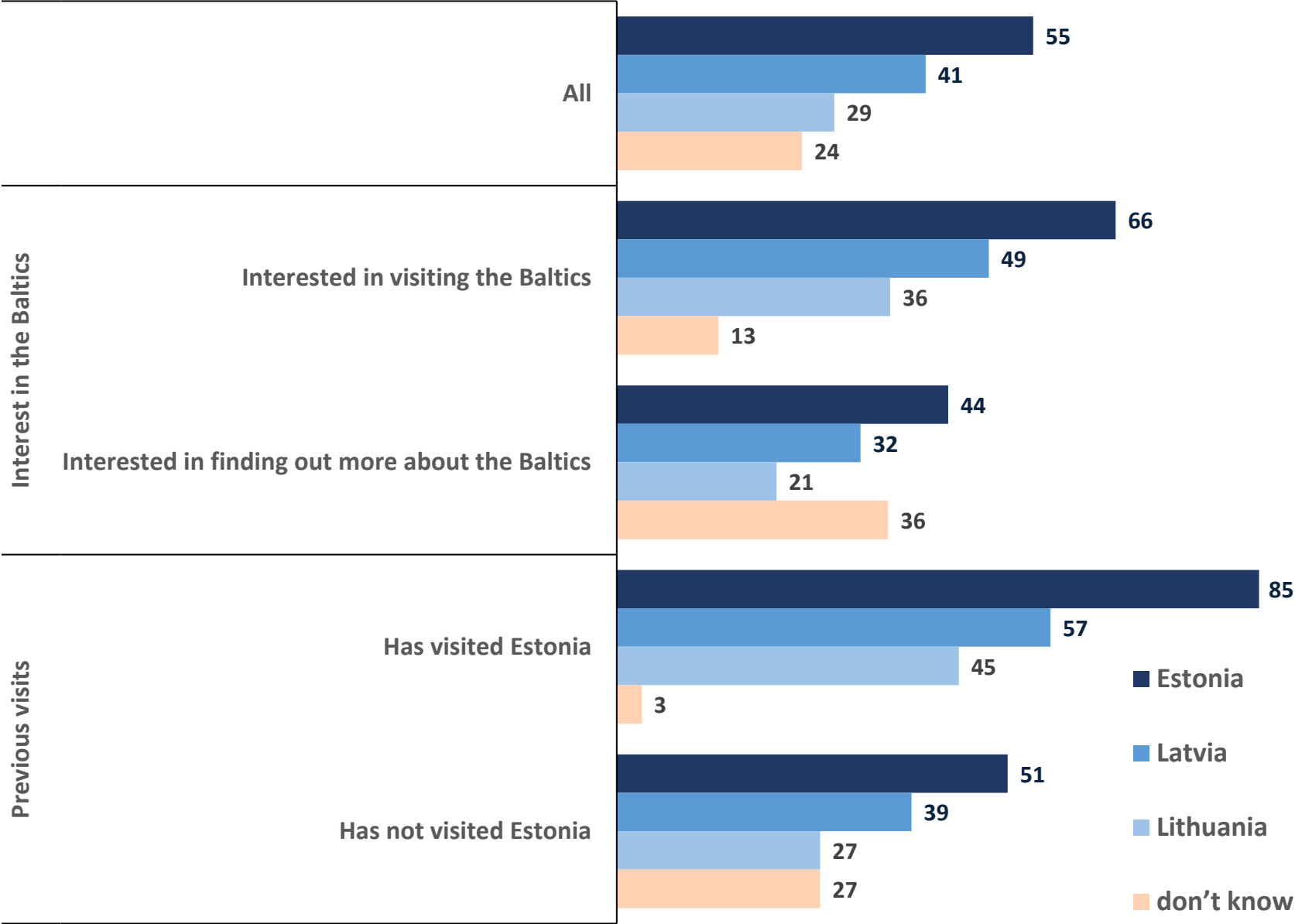
- Using a travel consultant at a tour operator / local travel agency
- Booking online at a tour operator's / travel agent's website
- Booking via other Internet channels
- No preference

Which Baltic countries would you like to visit?

Multiple responses allowed

- When visiting the Baltic countries, 55% said they would like to visit Estonia, 41% Latvia and 29% Lithuania.
- Since in reality German tourists have always visited Lithuania and Latvia more than Estonia, it is not certain whether the respondents indicated greater interest in Estonia because they knew that the survey was commissioned by Estonia.
- 85% of respondents who have been to Estonia are interested in visiting Estonia. Of those who have not been to Estonia 51% are interested in visiting Estonia.
- Of those who want to travel to Estonia, 43% would like to visit only Estonia, 28% would like to visit one more country (Latvia or Lithuania) in addition to Estonia and 29% would like to visit all 3 countries.

If you decided to take a holiday to the Baltics, which Baltic countries would you like to visit? % of respondents who are interested in visiting or finding out more, N=897

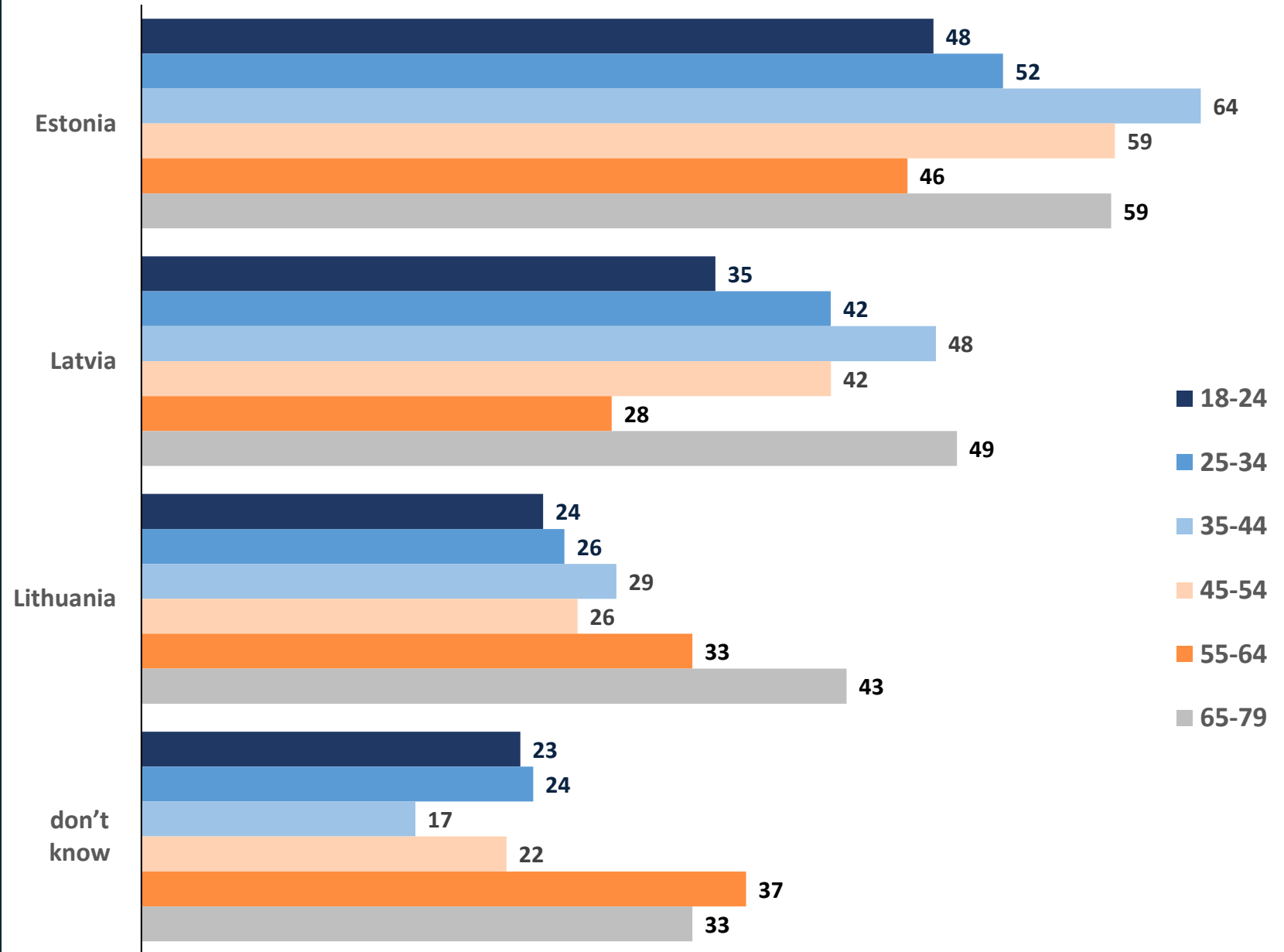


Which Baltic countries would you like to visit?

Multiple responses allowed

- People aged 35-54 and 65-79 have higher interest in Estonia than other age groups.
- Lithuania is of higher interest for people over 55 years and especially for people aged 65-79.

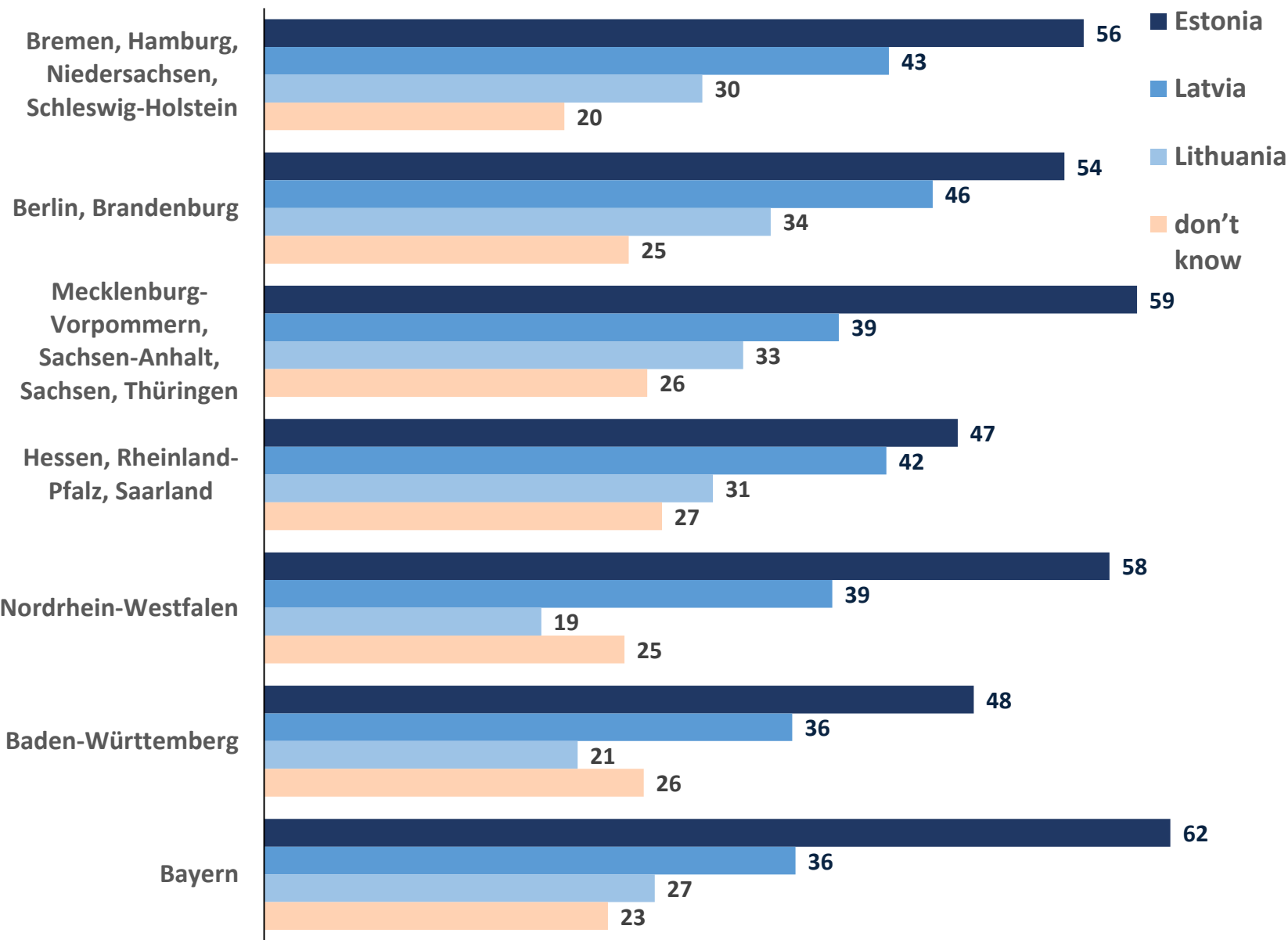
If you decided to take a holiday to the Baltics, which Baltic countries would you like to visit? % of respondents who are interested in visiting or finding out more, N=897



Which Baltic countries would you like to visit?

Multiple responses allowed

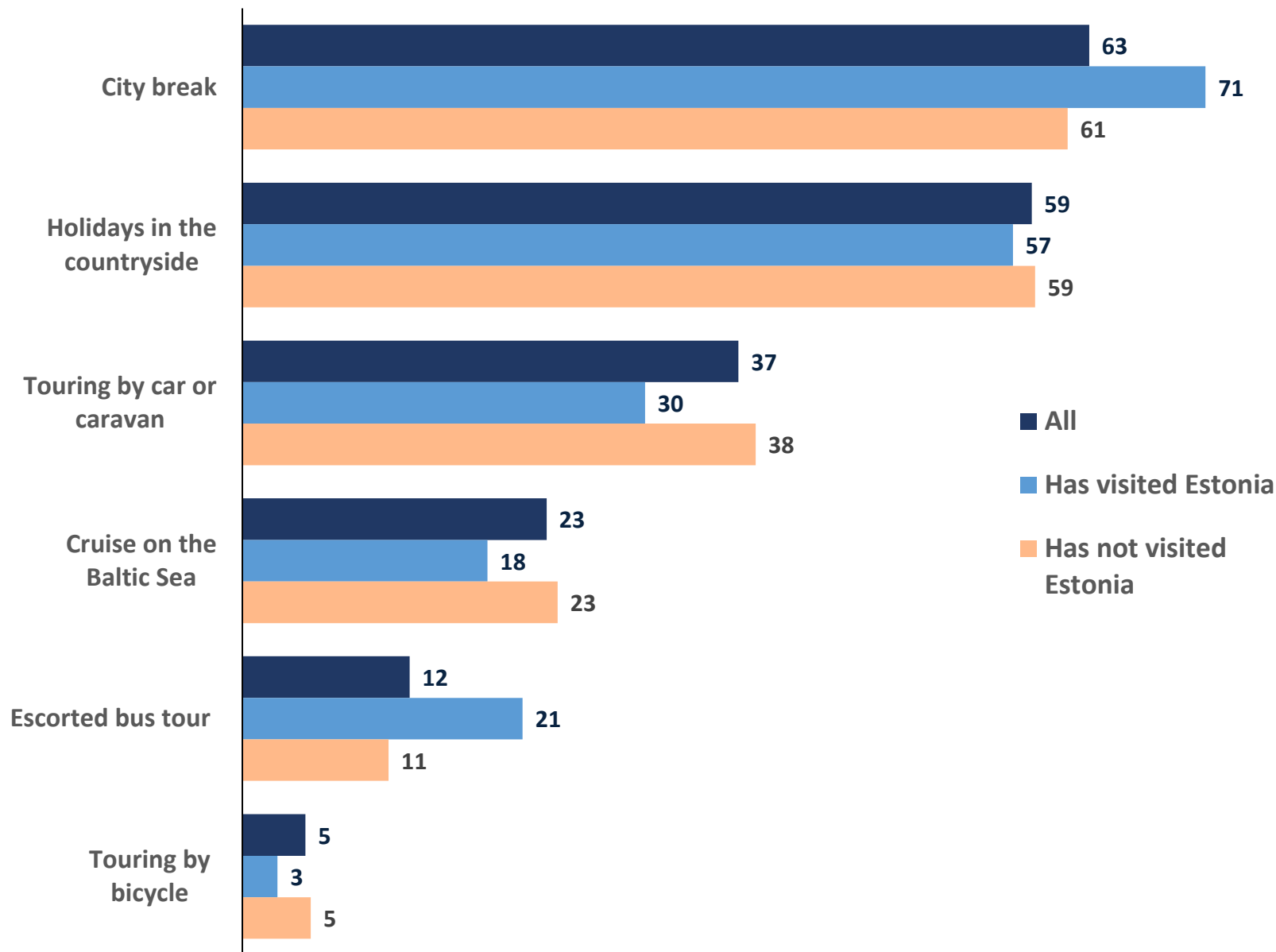
If you decided to take a holiday to the Baltics, which Baltic countries would you like to visit? % of respondents who are interested in visiting or finding out more, N=897



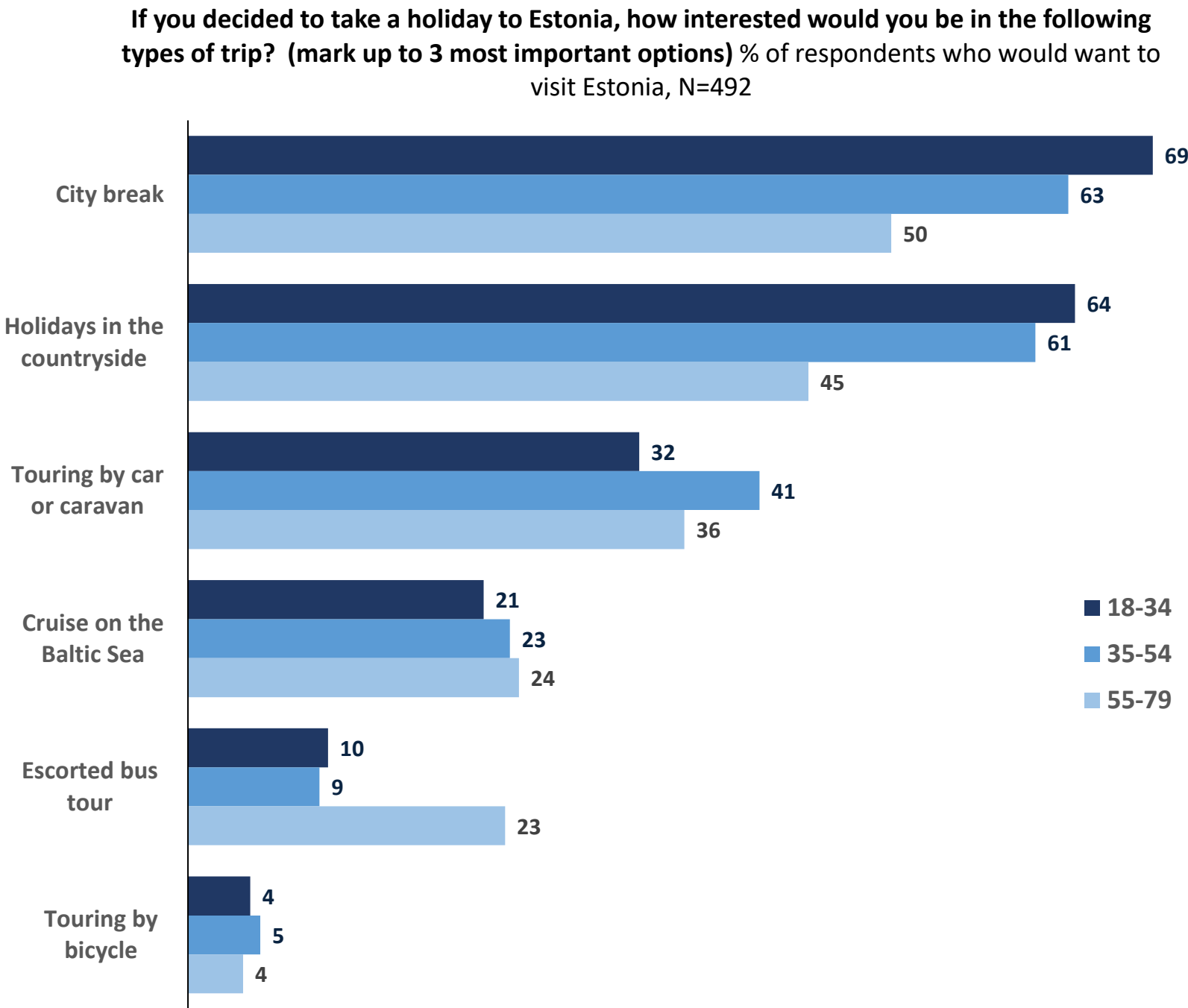
Interest in various types of trip when visiting Estonia

- For those who want to visit Estonia, the 2 clearly preferred travel options would be a holiday in the city (63% named it among the 3 most important options) and a holiday in the countryside (59%).
- Relatively important options are also traveling by car or motorhome (37%) and a cruise on the Baltic Sea (23%).
- An organized bus trip has a rather modest place in preferences (12%), but 1/3 of those over 65 named it among the 3 most important options.

If you decided to take a holiday to Estonia, how interested would you be in the following types of trip? (mark up to 3 most important options) % of respondents who would want to visit Estonia, N=492

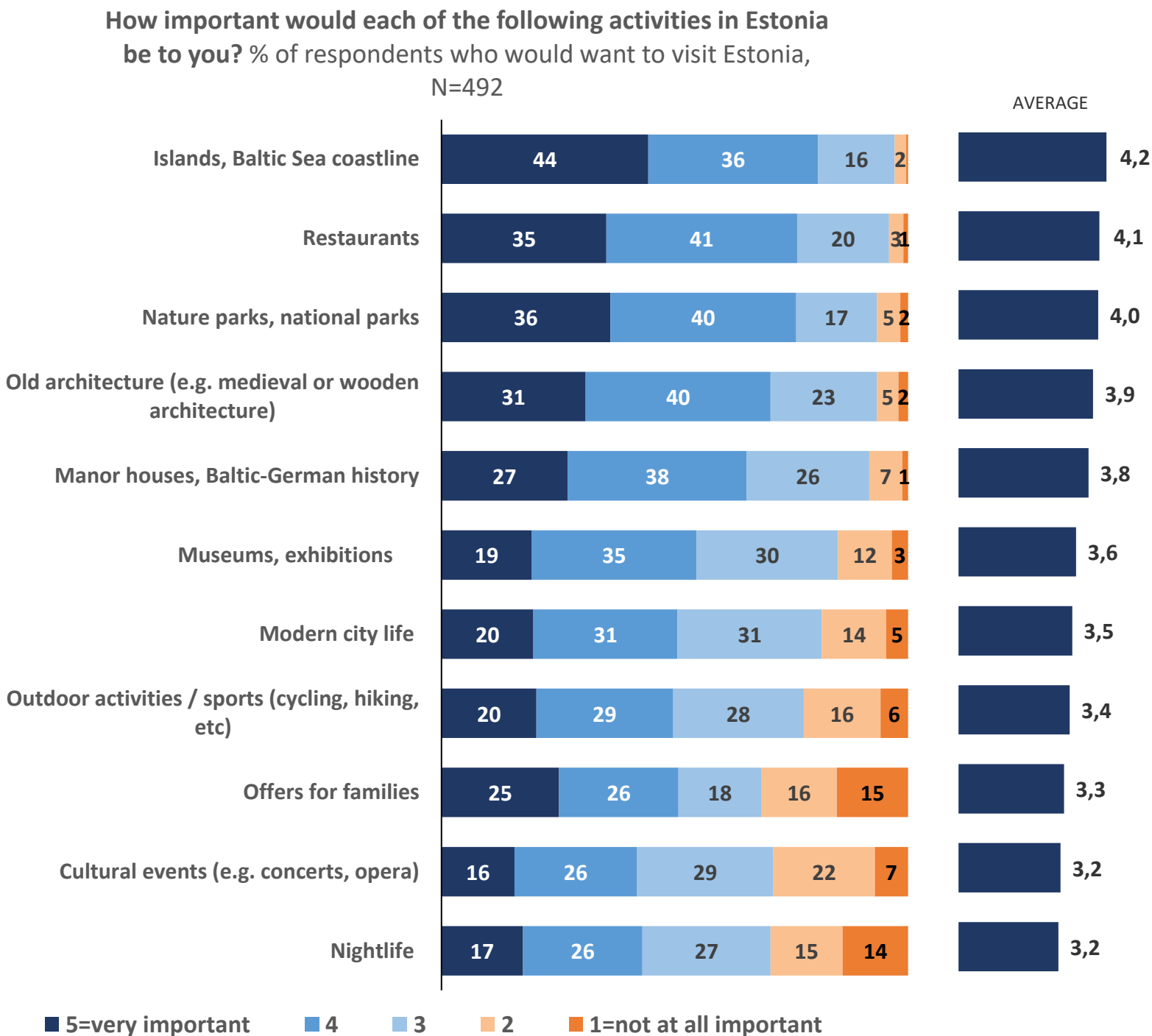


Interest in various types of trip when visiting Estonia



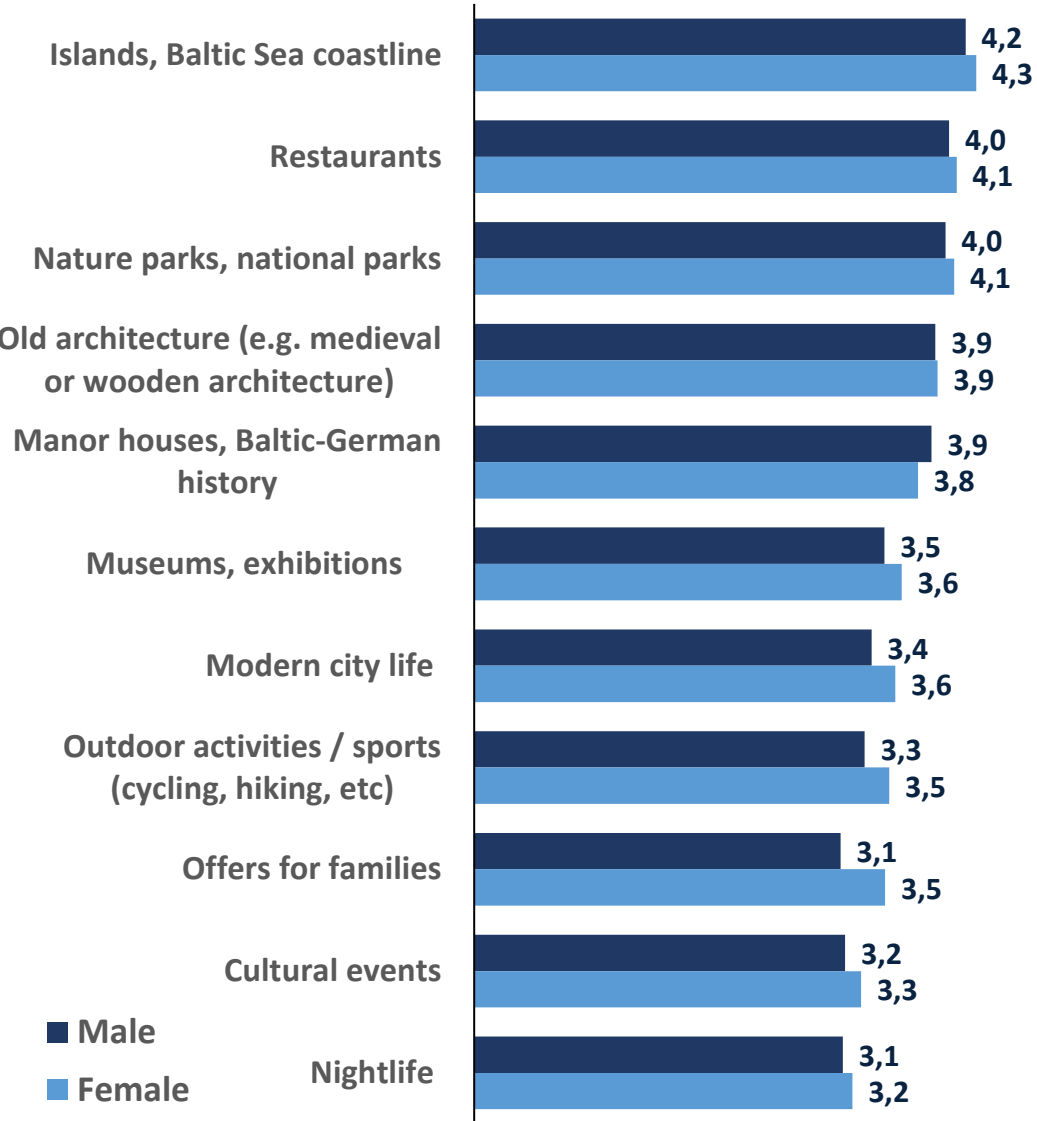
Importance of various sights and activities in Estonia

- When traveling to Estonia, the most important attractions would be the islands and the Baltic Sea coast, followed by restaurants, nature parks / national parks and old architecture (both medieval and wooden).
- Islands and the Baltic coast, nature parks and old architecture are less interesting than average for the youngest group, but they are more interested in outdoor activities, family activities, cultural events and nightlife.
- 43% of those who have children aged 0-14 in the household said that activities for children were very important and 38% said these were somewhat important.

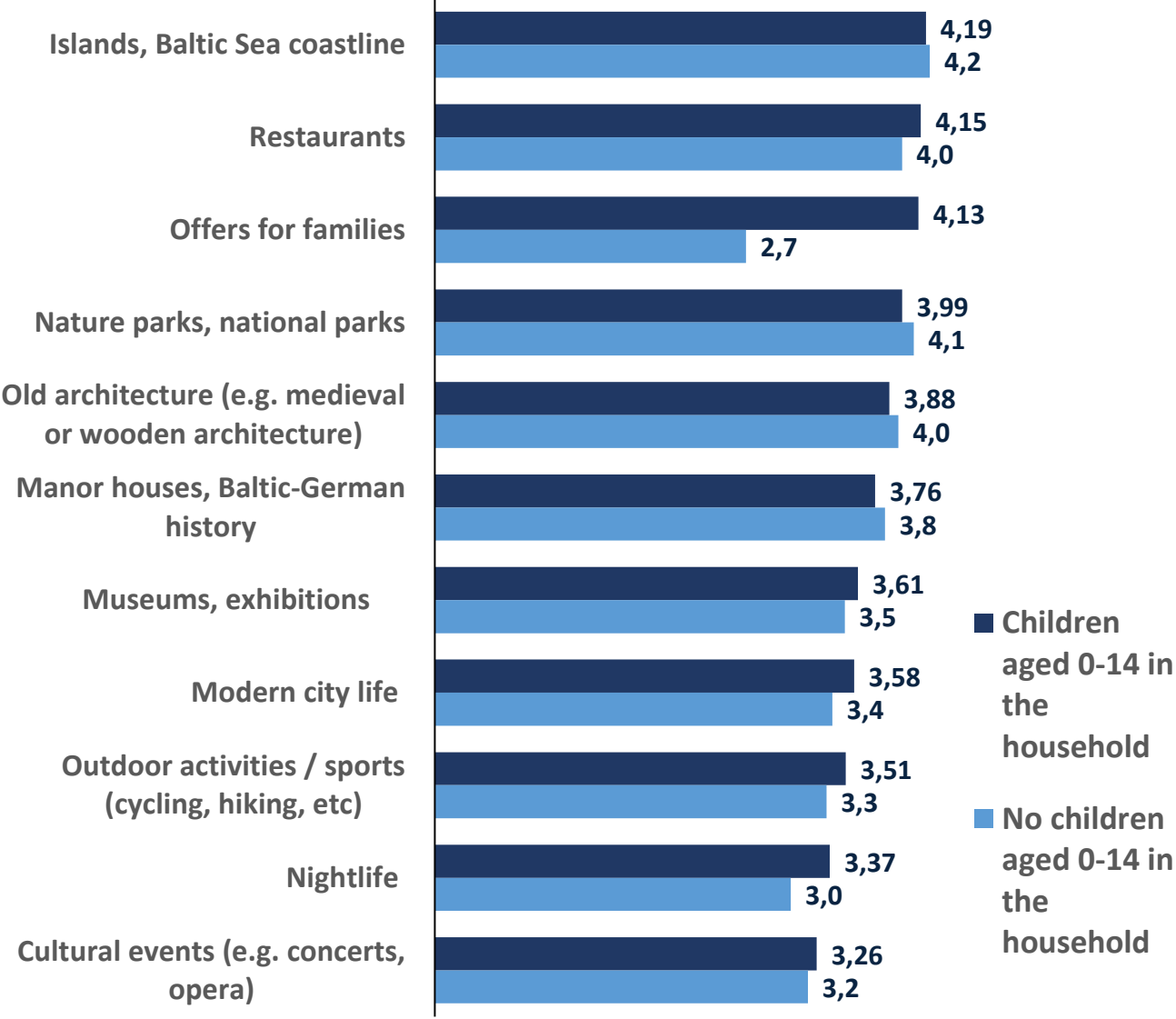


When travelling to Estonia, how important would each of the following sights or activities be to you? (scale: 5= very important and 1= not at all important)

% of respondents who would want to visit Estonia, N=492

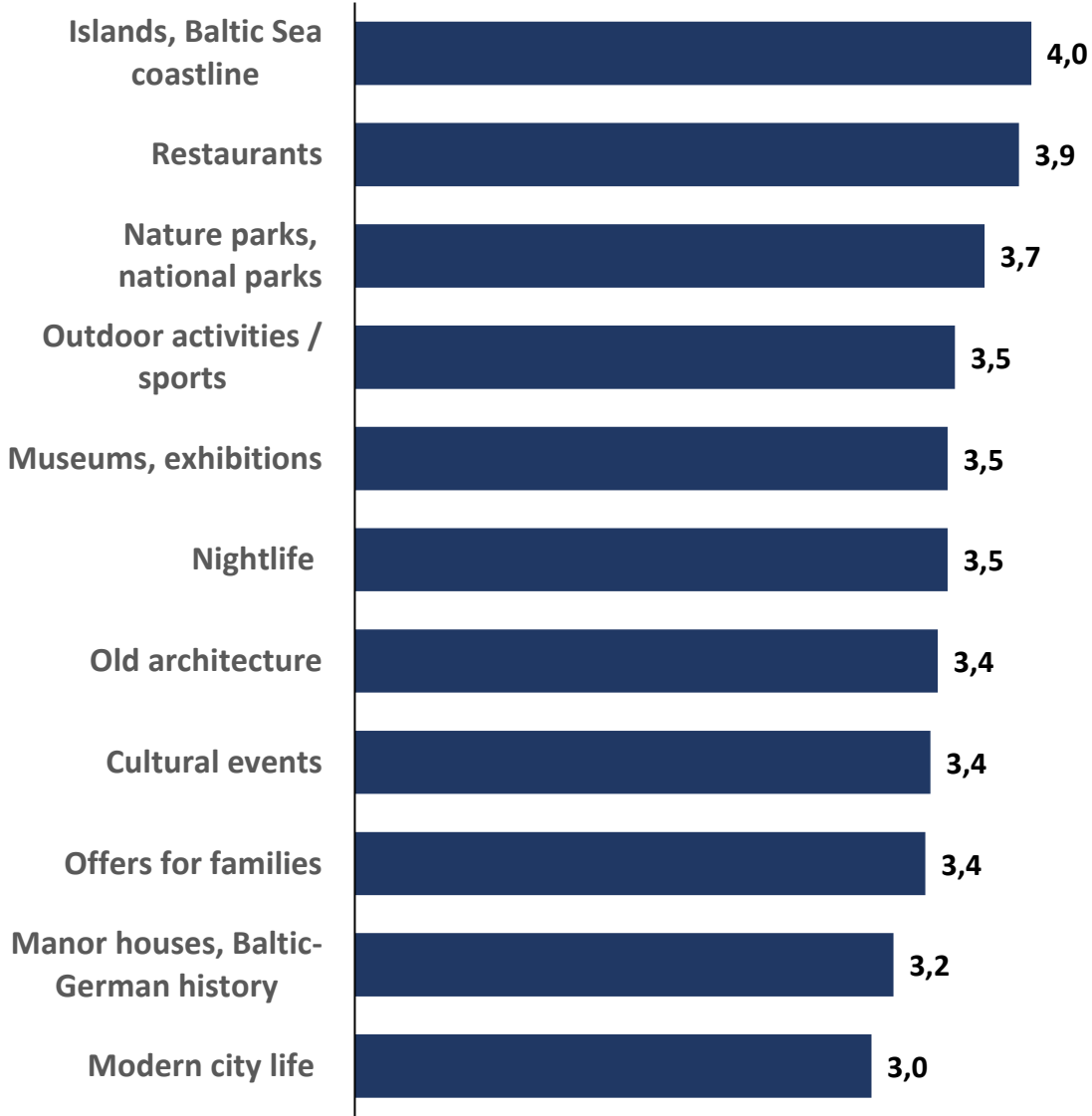


% of respondents who would want to visit Estonia, N=492

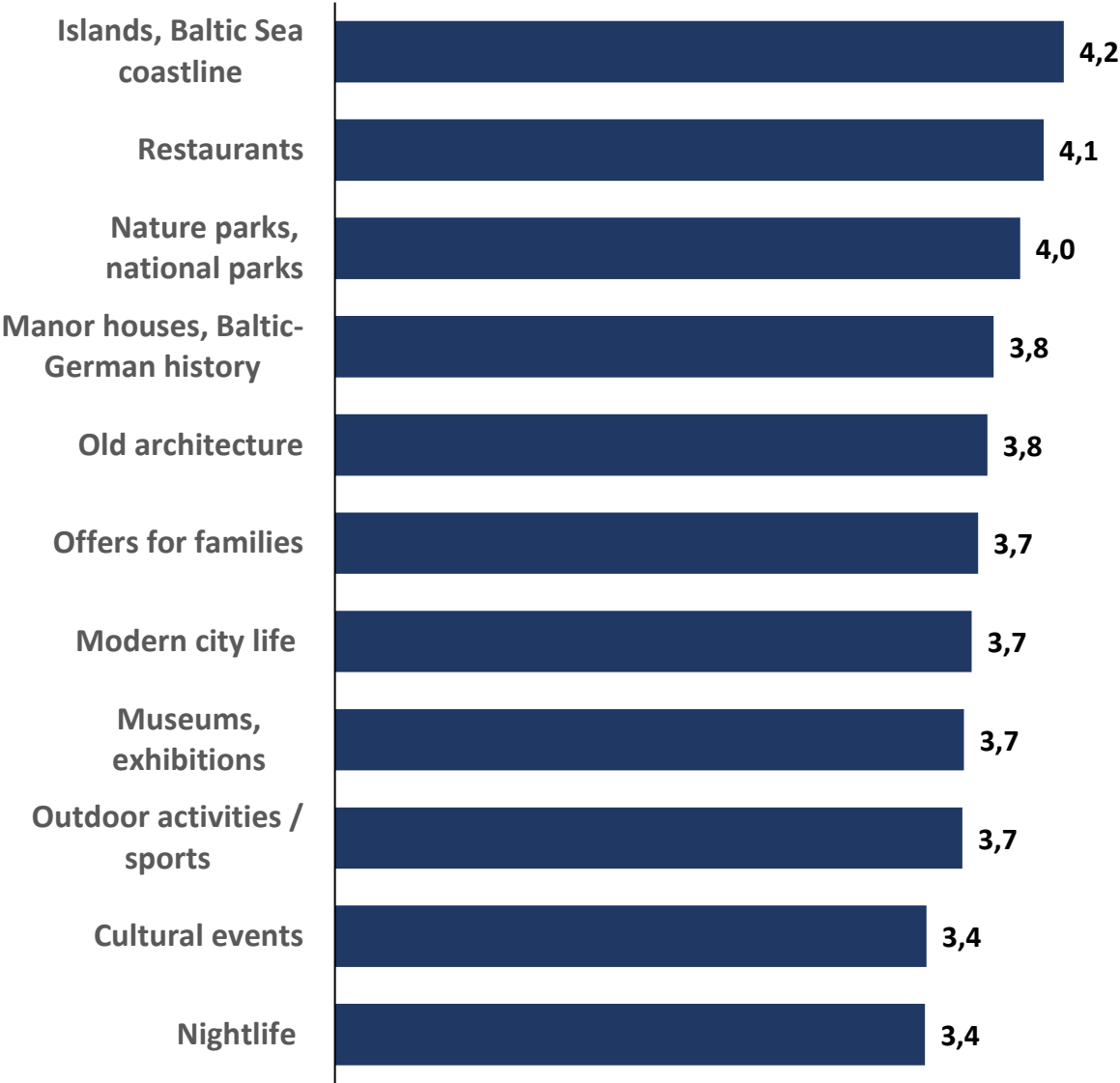


When travelling to Estonia, how important would each of the following sights or activities be to you? (scale: 5= very important and 1= not at all important)

Respondents aged 18-24, N=69

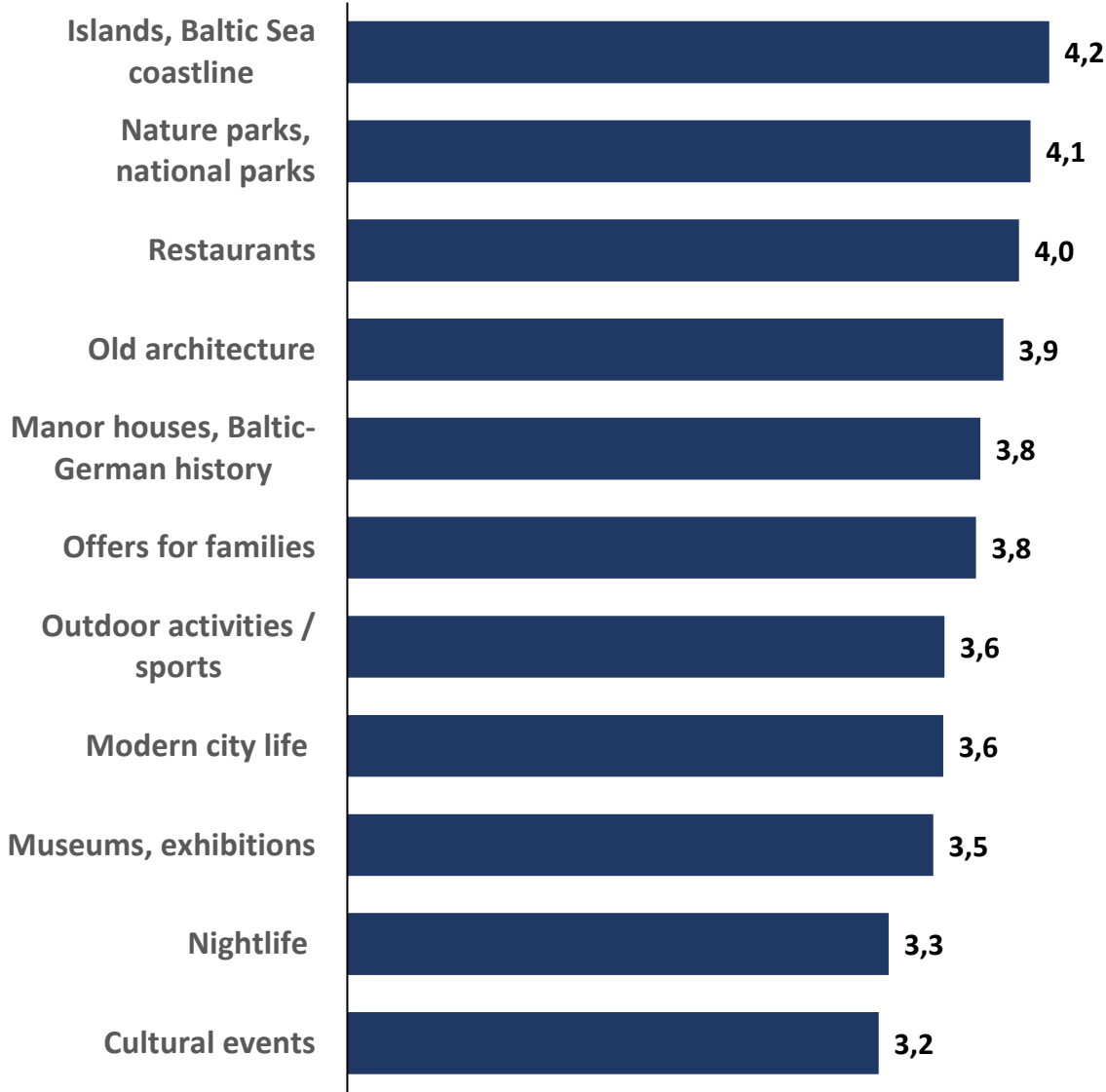


Respondents aged 25-34, N=110

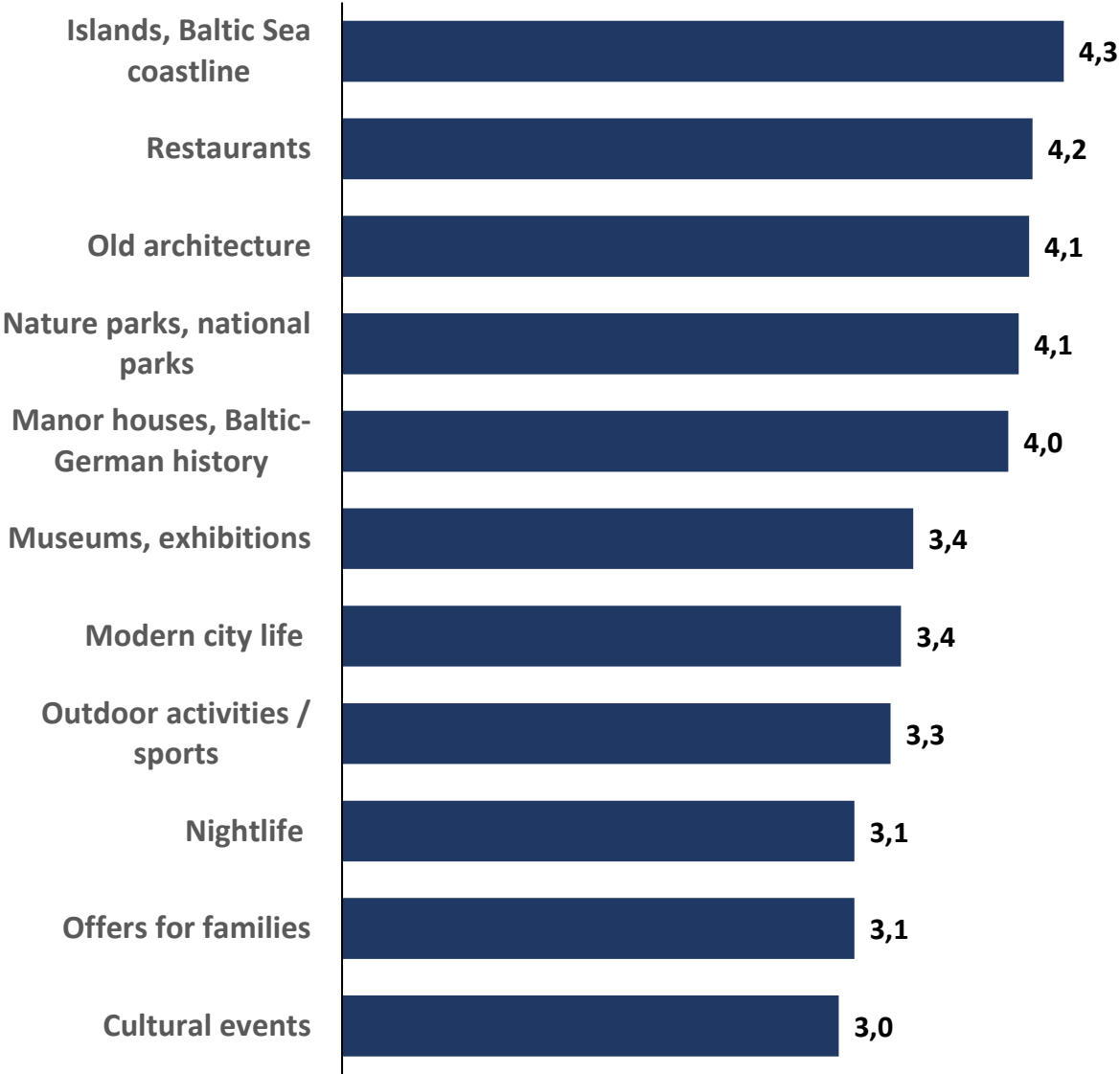


When travelling to Estonia, how important would each of the following sights or activities be to you? (scale: 5= very important and 1= not at all important)

Respondents aged 35-44, N=116

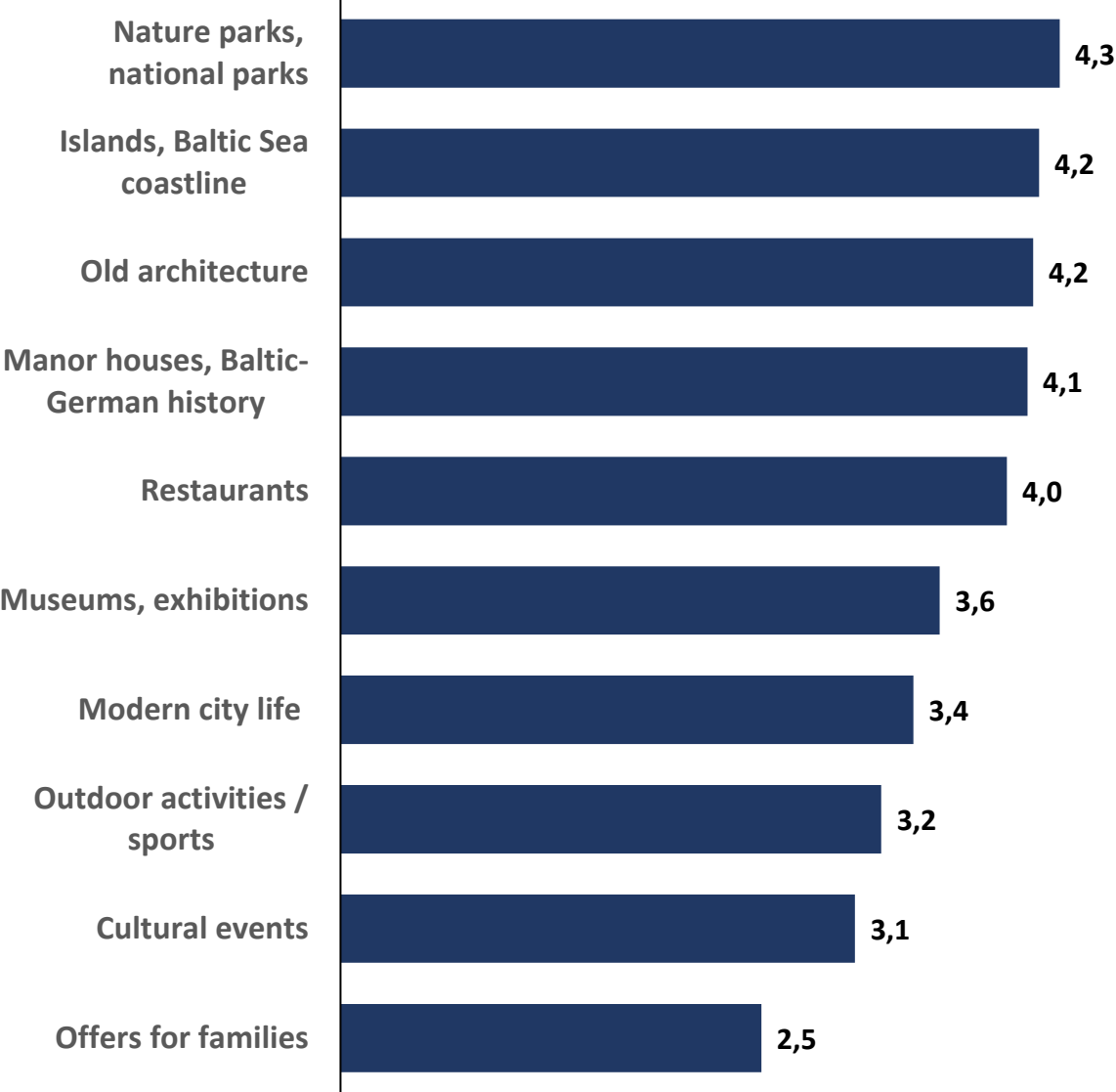


Respondents aged 45-54, N=96



When travelling to Estonia, how important would each of the following sights or activities be to you? (scale: 5= very important and 1= not at all important)

Respondents aged 55-64, N=57



Respondents aged 65-79, N=44

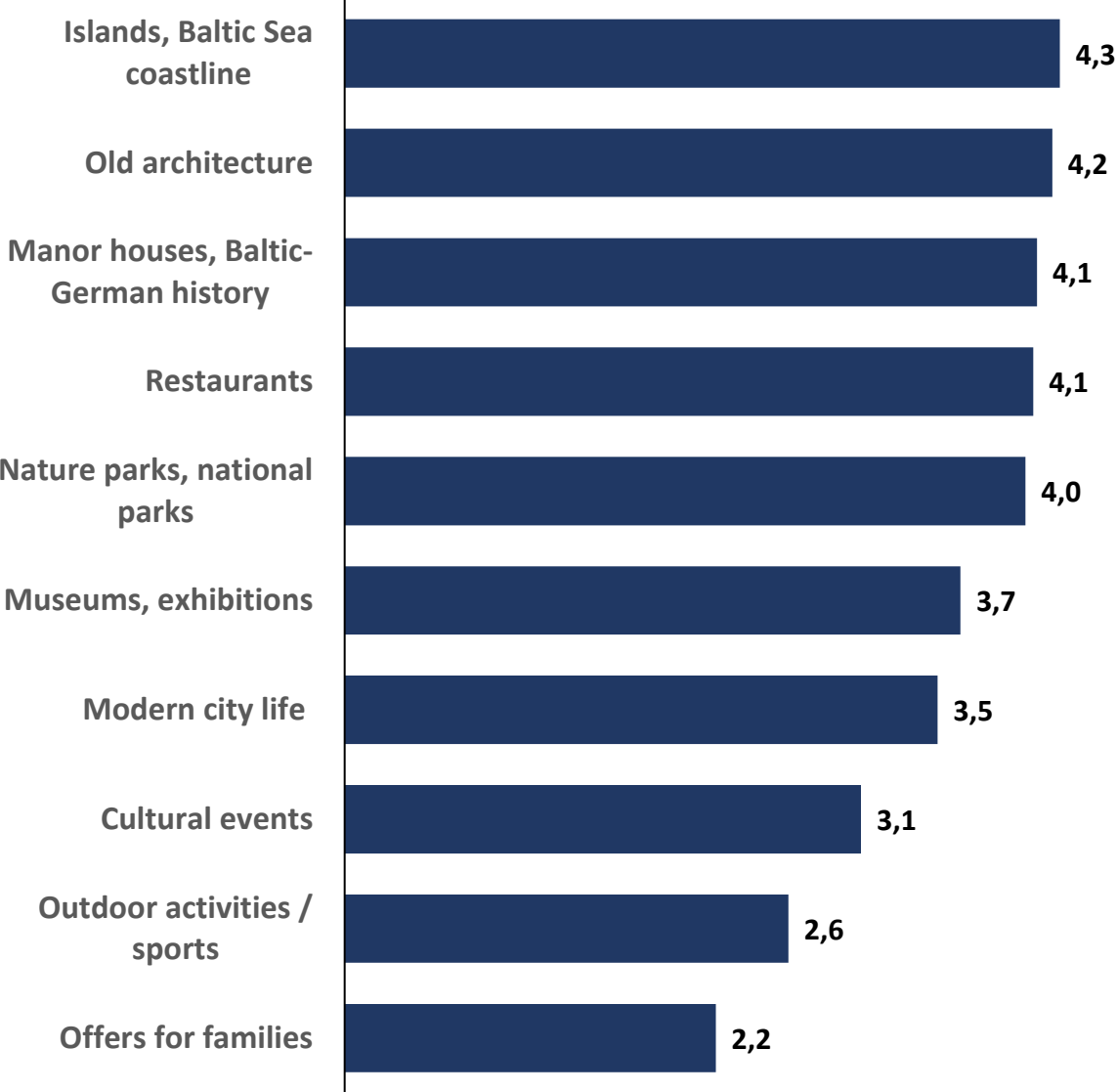


Image of Estonia

The image of Estonia mainly consists of the following characteristics: Estonia is a safe destination; Estonia has a reasonable price level; Estonia is easy to reach; Estonia's proximity to Finland also inspires people to travel to Estonia.

Older age groups, especially 65-79-year-olds were less likely to agree with the statements „Estonia’s digital innovations inspire me to travel to Estonia“ and „Estonia’s location close to Finland inspires me to travel to Estonia“

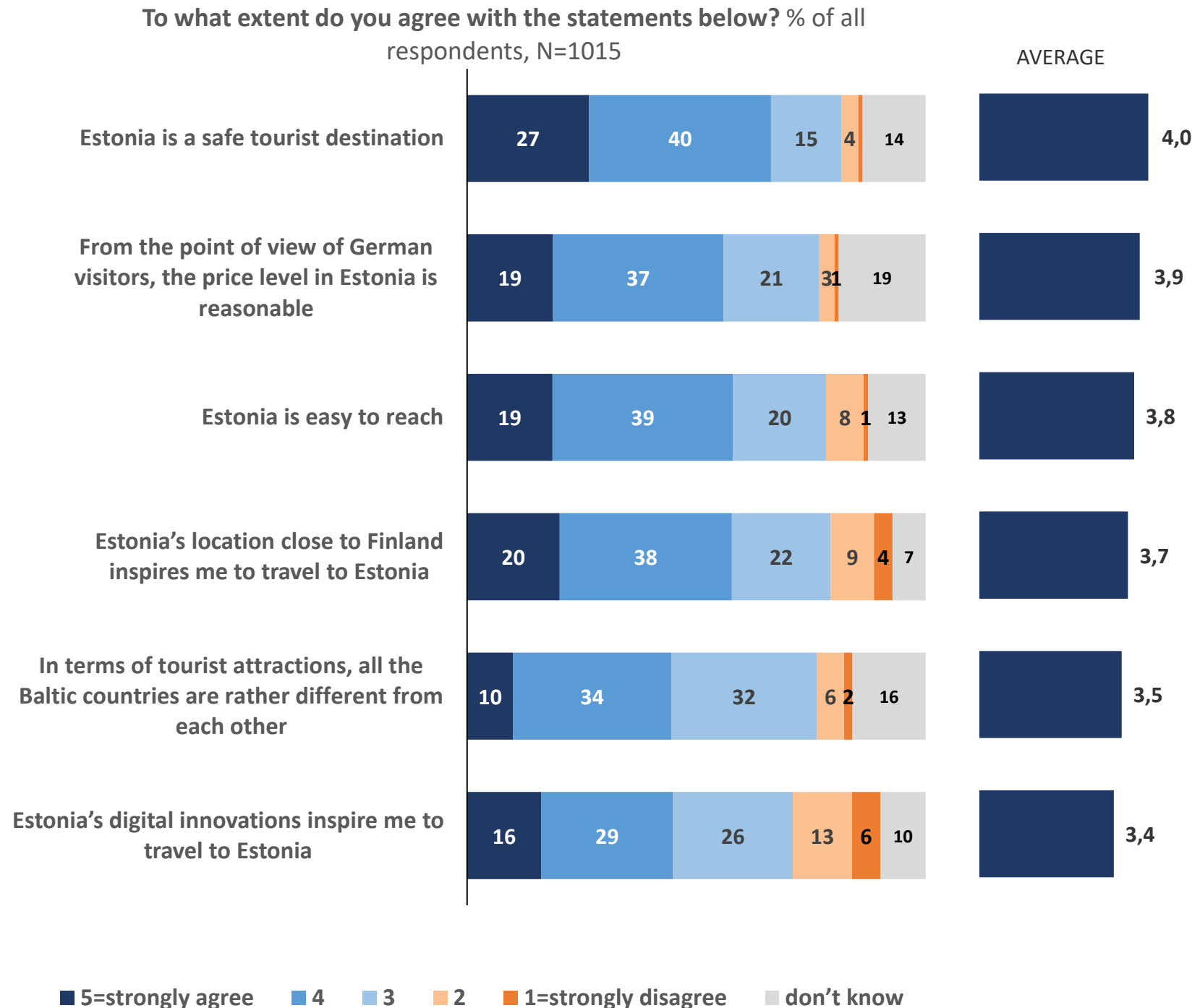


Image of Estonia

Those who have visited Estonia gave higher ratings to all aspects (compared to those who have not been to Estonia).

To what extent do you agree with the statements below? Average scores
(5=strongly agree, 1=strongly disagree); N=1015

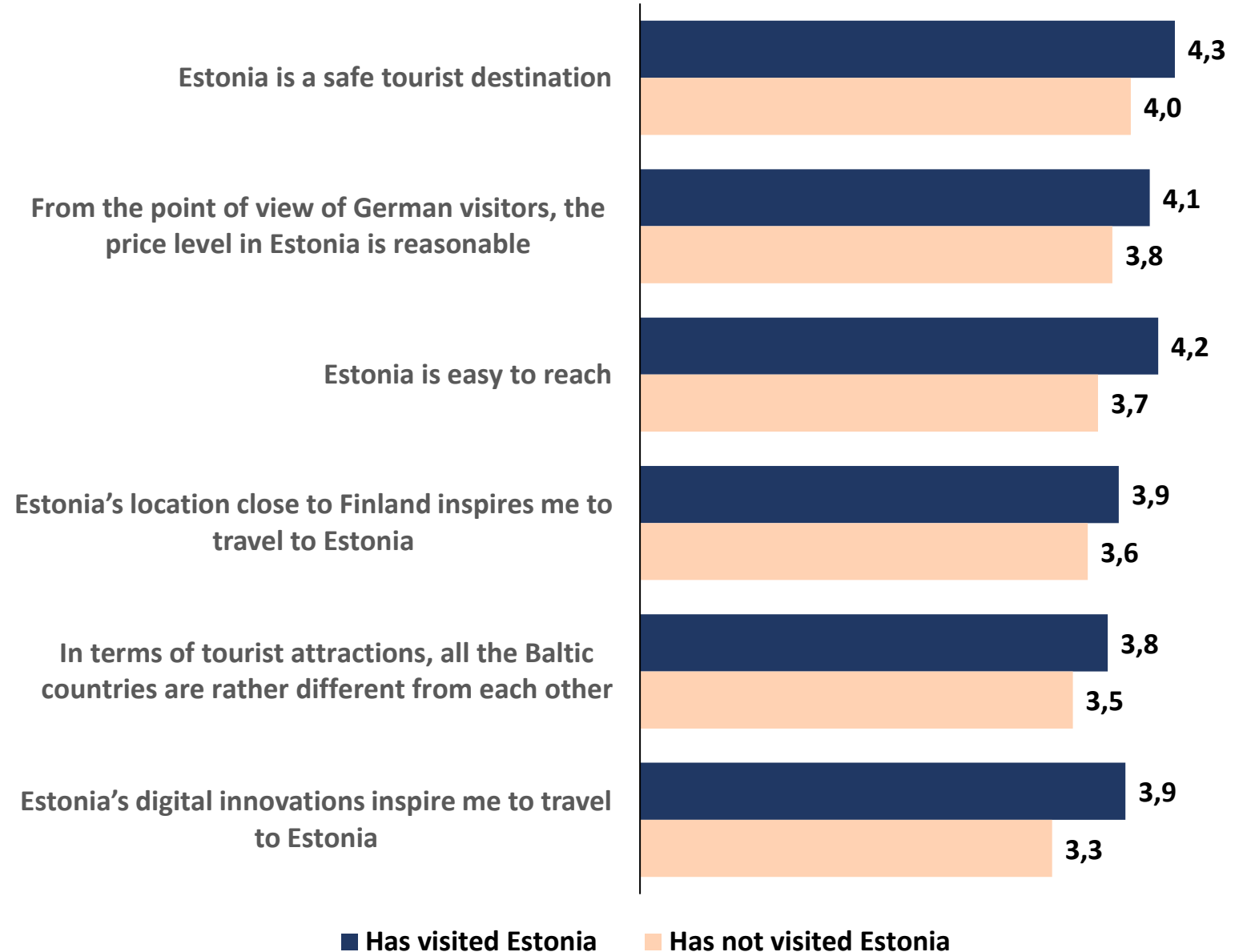


Image of Estonia

Those who are interested in vacationing in the Baltics in the next 3 years gave better scores to all factors than those who do not know much about the Baltics as a vacation destination but are interested in receiving additional information.

The lowest scores were given by those who are not interested in either option. At the same time, this target group rather disagreed with 2 statements:

Only 14% of those who are not interested in the Baltics agreed with the statement "Estonia's digital innovations inspire me to travel to Estonia", while 38% disagreed.

Only 16% of those who are not interested in the Baltics agreed with the statement "Estonia's proximity to Finland inspires me to travel to Estonia", while 41% disagreed.

To what extent do you agree with the statements below?
Average scores (5=strongly agree, 1=strongly disagree); N=1015

