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IDEAS SHAPING THE WORLD

GLOBSEC Trends 2022

Estonia

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Focus on Estonia

According to GLOBSEC Trends polling, Estonia has long expressed the highest levels of satisfaction with democracy in the region. A resounding 80% of respondents in Estonia agree that democracy is beneficial for their country and express trust in the president, government and the media. The public further demonstrates a Western affinity despite being one of the Baltic states with the least support for NATO and the EU, primarily due to the presence of the Russian-speaking minority. GLOBSEC Trends has previously found that Estonians, meanwhile, are among the least likely in the region to believe conspiracy theories. Russia's invasion of Ukraine has altered perceptions towards Russia and Vladimir

Putin across the region including Estonia. Around two-thirds of the country now hold negative views towards Putin and the same consider Russia to be a security threat. Key attitudinal shifts in 2022 are examined in this report, providing deeper insight into generational differences concerning support for Western structures, satisfaction with democracy, and perceptions of Russia. The report also puts forward recommendations for engaging with vulnerable groups.



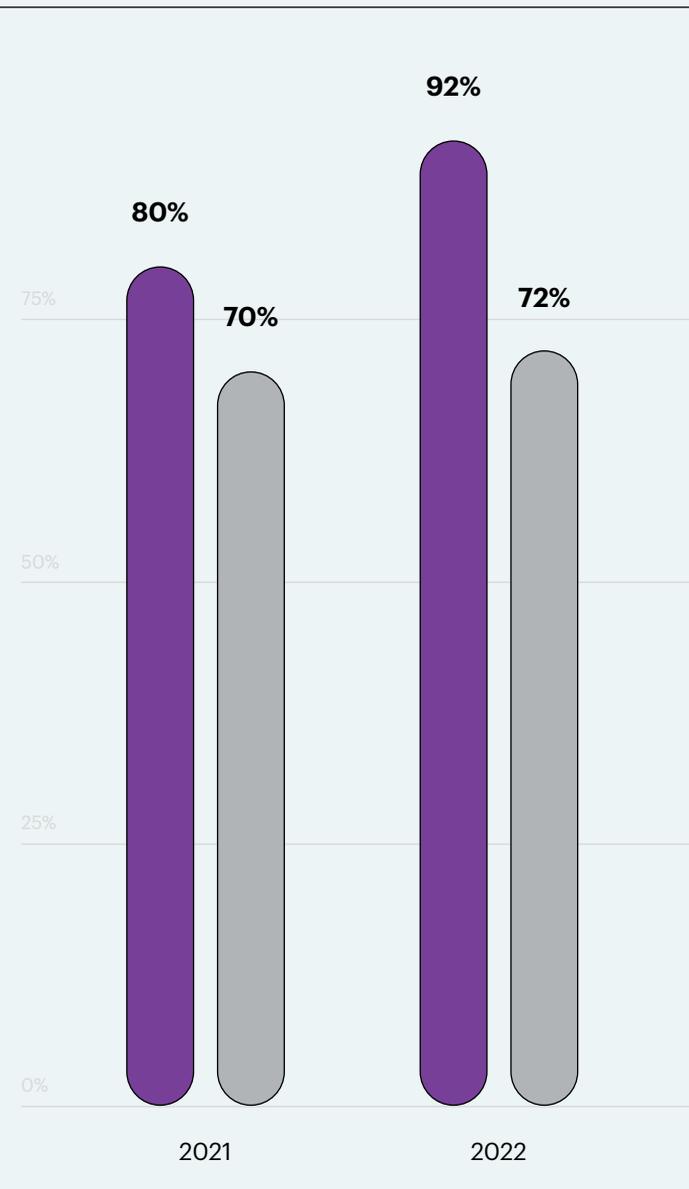
Youth – positive development

A significant shift in attitudes across numerous issues was measured among younger people (aged 18-24). NATO support increased from 80% in 2021 to 92% in 2022. Yet despite the increase in support from young people, the average remained constant at 70%.

Despite the increase in support from young people, by 12 percentage points, the average support for NATO remained constant from the previous year.

Those who would be willing to stay in NATO

18-24 y.o. Average



The youth demographic also displays greater support for the West. While 34% expressed favourable views towards the West in 2021, the number surged to 60% in 2022. There has been a corresponding drop in the share of people supporting an in-between geopolitical posture and those unsure about their geopolitical preferences.

The level of satisfaction with democracy among young people has also changed considerably over the past two years. The graph below demonstrates that satisfaction has increased from 49% in 2020 to 85% in 2022 (a 36-percentage point rise). Across the entire population, satisfaction increased from 42% in 2020 to 66% in 2022.

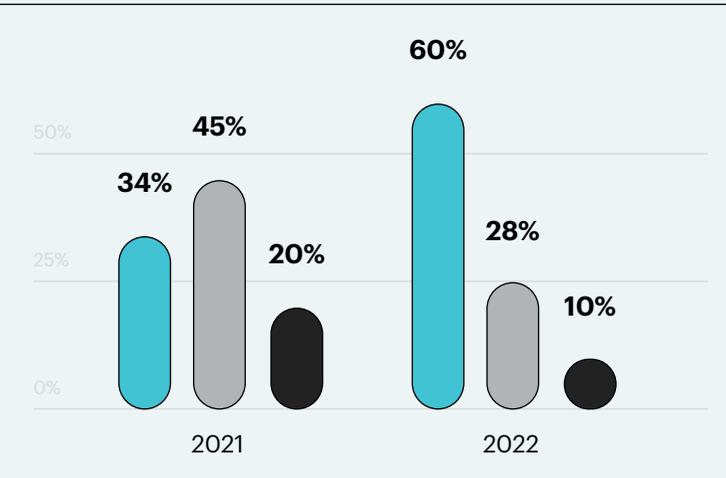
Younger people are, therefore, the group most satisfied with Estonia's political system and the greatest proponents of the West based on these findings. A majority in the 18–24 age group also did not believe in manipulative narratives posed to them in the polling, underscoring the fact that young people are also the most immune to conspiracy theories.

Having more diverse patterns of media consumption, young people are able to distinguish between living in a free liberal democracy and other (i.e. autocratic) regimes. Younger people, moreover, have directly benefited from freedoms gained from membership in Western institutions and the Western style of life. These perceptions are thus driven mostly by their personal experiences.

There has recently been much discussion in your society about the geopolitical and civilisational positioning of your country. Would you like your country to be part of the West, part of the East, or somewhere in between?

Responses of 18 - 24 y.o.

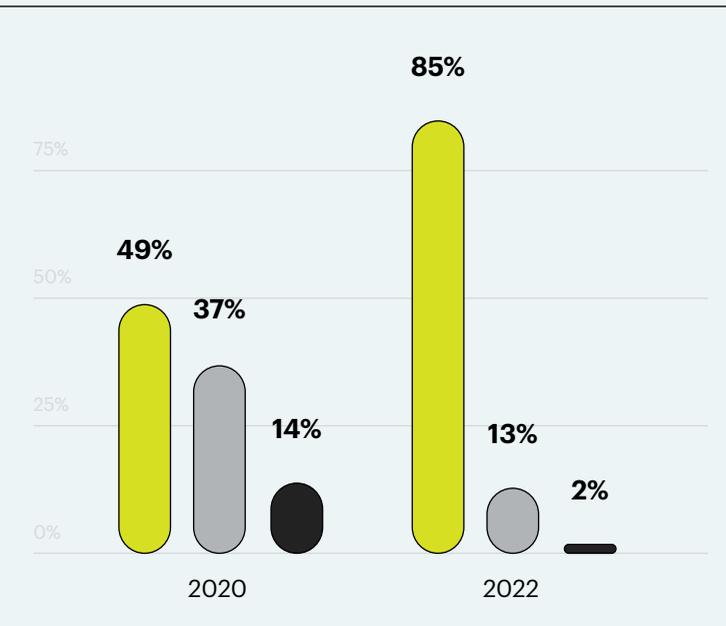
West In between Do not know



If you take all circumstances into account, to what extent are you overall satisfied with how democracy works in Estonia?

Responses of 18 - 24 y.o.

Satisfied Dissatisfied Do not know



Age curve

The significant shift among younger people has created an “age curve” phenomenon. Across a range of issues, the oldest and youngest subgroups are the most progressive in their pro-Western attitudes and support for democracy and its underlying values. Given that less pro-Western sentiment was measured among young people previous year, the formation of the curve on geopolitical issues only appeared in 2022. However, with regard to public opinion concerning democracy, a “U” curve was already apparent in 2020.

Estonia has 74% of respondents supporting the EU membership. Despite the clear and overwhelming majority, it ranks among the lower levels of support for the EU in the region. Middle-aged respondents are generally responsible for more modest numbers, whereas young people are most in favour of the EU, NATO, and the West. According to the poll, the 18-24 and 65+ age groups are the most supportive of NATO and the EU. The graphs demonstrate the U curve phenomenon among different age groups.

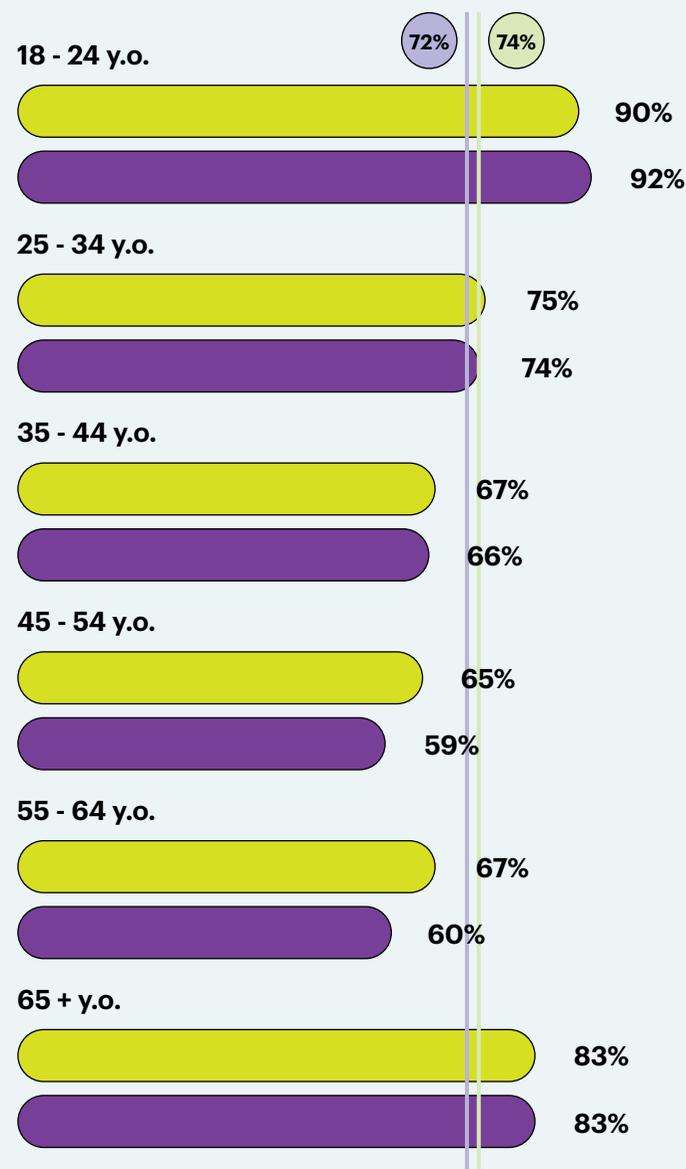
The middle-aged demographic, compared to others, is less likely to back the West (though a majority still do) and is more likely to prefer a position between the East and the West (though most still do not). Young voters (aged 18-24), meanwhile, are considerably less likely to assume a “somewhere in between” position on their geopolitical views as the figure dropped from 45% in 2021 to 28% in 2022.

The graphs in Age curve section demonstrate data for 2022.

How would you vote for your country to stay in the EU/NATO or leave the EU/NATO?

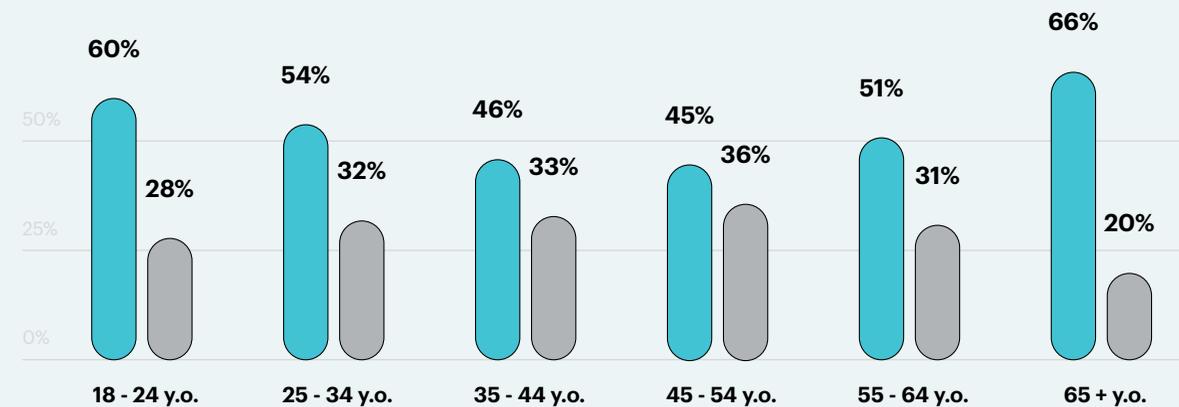
Based on the age

■ the EU ■ NATO
■ Average EU ■ Average NATO



Would you like your country to be a part of the West, part of the East, or somewhere in between?

■ West ■ In between (responses for East were minimal)



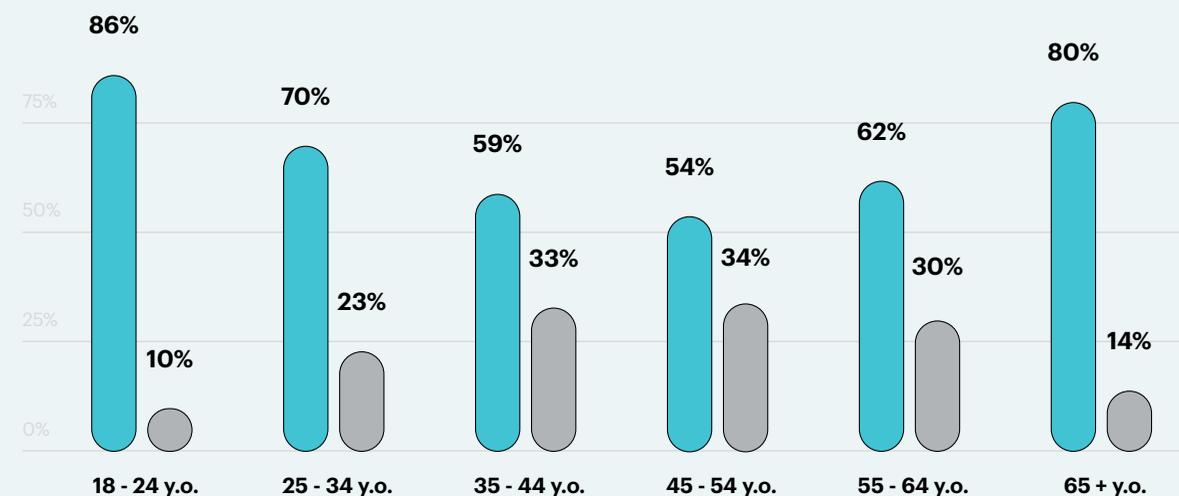
An age curve is also apparent concerning perceptions towards Russia and Vladimir Putin. Middle-aged people express more favourable views towards Putin than others and only a slight majority considers Russia to be a threat, younger and older Estonians, meanwhile, were far more likely to label Moscow a threat.

The U-shaped age curve regarding these perceptions could be explained, in part, by

dissatisfaction and disillusionment among middle-aged part of the population. The middle aged group has not benefited as much as others from the country's de-sovietisation and westernisation over the last thirty years. The age group also displays rather narrow media consumption patterns that shape its world views – these habits render people more susceptible to populist rhetoric proclaimed by some political parties in Estonia.

Do you think Russia presents a security threat to Estonia?

■ Yes ■ No



Democracy

Estonia boasts the highest level of satisfaction with democracy in the region according to GLOBSEC Trends 2022 polling. The figure increased from 42% (already above average in the region) in 2020 to 66% in 2022. Additionally, 80% believe that democracy as a system based on equality, human rights and freedoms, and the rule of law is good for their country. The “U” shaped age curve on this metric was already present in 2020. But the curve steepened in 2022 due to a heightened rise in satisfaction with democracy among younger and older people. At the same time, 17% of women and 21% of people between the age of 45-54 are unsure whether democracy is good for Estonia. The latter age group expresses among the most sceptical and even cynical views towards different political developments in Estonia.

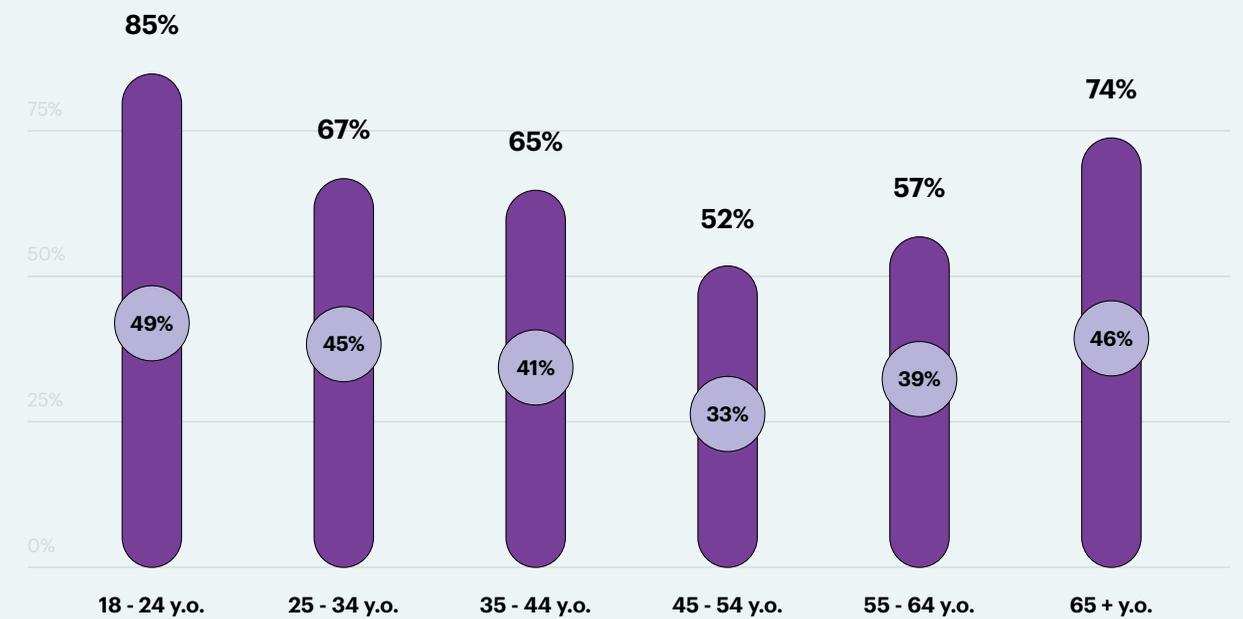


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Satisfaction with democracy and the political system are also underlined by increased agreement with the statement “the needs of people like me are taken into an account by the political system in Estonia”. While only 34% felt this was true in 2020, 47% agreed with the statement in 2022. Though this sentiment grew across all age groups, it surged most among older and younger people.

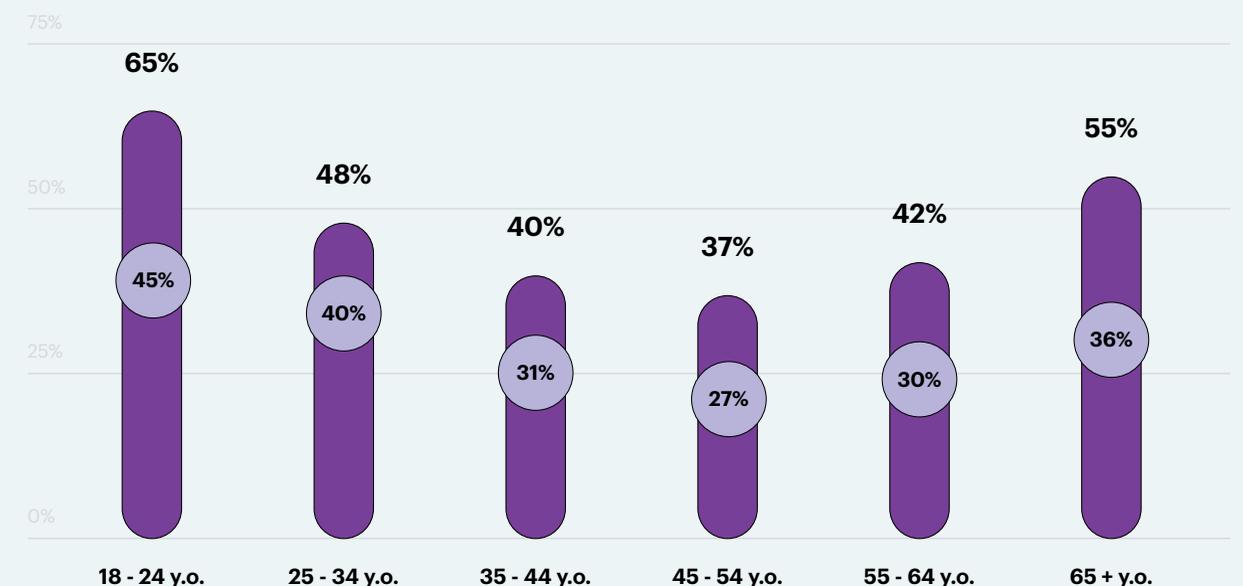
Satisfaction with how democracy works in Estonia

2020 2022



Those who believe that needs of people like me are taken into account by the political system

2020 2022



Recommendations

① Target middle-aged group.

Although respondents in Estonia generally perceive Russia to be a threat and espouse broad support for NATO and the EU, the middle-aged subset appears to be the least supportive group. More efforts, therefore, are needed to raise awareness and invest in further inclusion of people aged between 35 and 55.

③ Work with Russian minorities.

Oversecuritisation of the Russian-speaking minority in Estonia would represent a counterproductive move. Societal cohesion and inclusion rather should be fostered as the only feasible way to forge prosperous and peaceful development.

② Seize broad satisfaction with democracy as an inspiration for the region.

The high level of satisfaction with democracy in Estonia is rather unique for the Central European region. The causes and factors underpinning this outcome should be studied in depth and the lessons therein promoted as best practices. The success could be replicated or used to inspire other countries in the region. International peer-to-peer interactions between government officials and civil society, alternatively, could be used to promote beneficial knowledge-sharing.

④ Shift among young people as an example for other countries.

Given their attitudes and perceptions, young people could serve as good role models/agents of positive change advancing their understanding of democracy and promoting European values in Estonia.



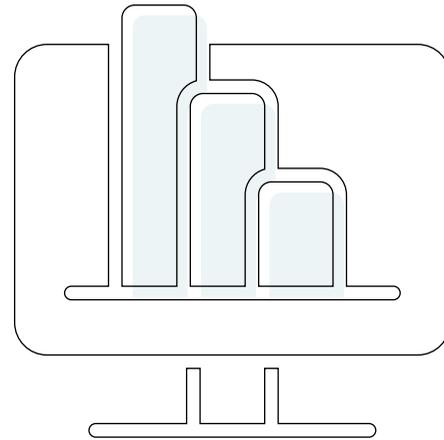
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Methodology

The outcomes and findings of this report are based on public opinion poll surveys carried out in March 2022 on a representative sample of the population in nine countries: Bulgaria, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia. The surveys were conducted on a sample of 1,000 respondents per country (9,000 respondents altogether) using stratified multistage random sampling in the form of computer-assisted telephone interviewing (CATI). In all countries, the profiles of the respondents were representative of the country according to gender, age, education, place of residence and size of settlement. For the purposes of graphical data visualisation, the results were rounded to full numbers. To improve the readers' experience, the responses in closed questions with a scale were generalised. For example, a question with options definitely agree/ rather agree/ rather disagree /definitely disagree was merged to agree / disagree. The opinion polling was conducted by Turu Uuringute and coordinated by FOCUS, s.r.o. agency and the comparative result were published in May 2022 as **GLOBSEC Trends 2022**. The results have been compared to polls conducted with the use of consistent methodology since 2020.



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