RESIDENTS' SURVEY ON ECOLOGICAL LABELING

Baltic States

customer

Šiaurės ministrų tarybos biuras Lietuvoje

contractor

spinter research

ESOMAR WORLD RESEARCH

iris THE INDEPENDENT RESEARCH INSTITUTES NETWORK

2025 June

METHODOLOGY

TIMING

2025 05 19- 06 08

OBJECTIVE

To assess awareness of ecological labeling, attitudes towards environmental issues, and willingness to take action.

TARGET GROUP

Residents of Lithuania, Latvia, and Estonia aged between 18 and 75 years.

SURVEY METHOD

CAWI *(Computer Assisted WEB Interview).*

SAMPLE SIZE

During the study, the following number of respondents were surveyed:
Lithuania: 1023 respondents
Latvia: 1014 respondents
Estonia: 1009 respondents

SAMPLING

Quota sampling method.

LOCATION

Lithuania, Latvia, and Estonia

DATA ANALYSIS

Data analysis was performed using SPSS/PC statistical program.

SOCIO-DEMOGRAPHIC CHARACTERISTICS
Lithuania

GENDER (%)

Male	47
Female	53

AGE (%)

18-25 y.o.	12
26-35 y.o.	19
36-45 y.o.	20
46-55 y.o.	19
Over 56 y.o.	30

EDUCATION (%)

Higher education / unfinished higher education	35
College education / secondary education	59
Unfinished secondary education	6

DISTRICT (%)

Alytaus	5
Kauno	20
Klaipėdos	11
Marijampolės	5
Panevėžio	7
Šiaulių	9
Tauragės	3
Telšių	5
Utenos	5
Vilniaus	30

MAIN OCCUPATION (%)

Company owner / managing director	6
Specialist, regular employee	35
Worker / technical worker	23
Small business owner	6
Farmer	1
Unemployed	7
Retired	13
Student, high-school student	7
Homemaker	3

INCOME, PER ONE HOUSEHOLD MEMBER PER MONTH (%)

Up to 400 Eur	6
401–500 Eur	13
501–700 Eur	27
700-1000 Eur	25
Daugiau nei 1000 Eur	28

MARITAL STATUS (%)

Unmarried	28
Married / living in an unregistered marriage	61
Other	11

PLACE OF RESIDENCE (%)

Big city	46
Other city	25
Rural area	29

CHILDREN IN THE HOUSEHOLD (%)

Up to 18 y.o.		Up to 6 y.o.	
1	19	Yes	41
2	13	No	59
3 and more	2		
None	66		

SOCIO-DEMOGRAPHIC CHARACTERISTICS
Latvia

GENDER (%)

Male	46
Female	54

AGE (%)

18-25 y.o.	13
26-35 y.o.	17
36-45 y.o.	21
46-55 y.o.	19
Over 56 y.o.	30

EDUCATION (%)

Higher education / unfinished higher education	32
College education / secondary education	58
Unfinished secondary education	9

DISTRICT (%)

Rīga	45
Vidzeme	15
Kurzeme	16
Zemgale	11
Latgale	13

MAIN OCCUPATION (%)

Company owner / managing director	9
Specialist, regular employee	25
Worker / technical worker	30
Small business owner	4
Farmer	2
Unemployed	8
Retired	11
Student, high-school student	7
Homemaker	4

INCOME, PER ONE HOUSEHOLD MEMBER PER MONTH (%)

Up to 400 Eur	13
401–500 Eur	15
501–700 Eur	26
700-1000 Eur	25
Daugiau nei 1000 Eur	21

MARITAL STATUS (%)

Unmarried	32
Married / living in an unregistered marriage	57
Other	11

PLACE OF RESIDENCE (%)

Rīga	33
Other city	38
Rural area	29

CHILDREN IN THE HOUSEHOLD (%)

Up to 18 y.o.		Up to 6 y.o.	
1	20	Yes	43
2	15	No	57
3 and more	4		
None	62		

SOCIO-DEMOGRAPHIC CHARACTERISTICS
Estonia

GENDER (%)

Male	48
Female	52

AGE (%)

18-25 y.o.	12
26-35 y.o.	19
36-45 y.o.	21
46-55 y.o.	19
Over 56 y.o.	30

EDUCATION (%)

Higher education / unfinished higher education	34
College education / secondary education	56
Unfinished secondary education	10

DISTRICT (%)

Tallinn	33
Põhja-Eesti	14
Lääne-Eesti	11
Kesk-Eesti	9
Kirde-Eesti	9
Lõuna-Eesti	24

MAIN OCCUPATION (%)

Company owner / managing director	7
Specialist, regular employee	29
Worker / technical worker	28
Small business owner	6
Farmer	2
Unemployed	6
Retired	14
Student, high-school student	6
Homemaker	3

INCOME, PER ONE HOUSEHOLD MEMBER PER MONTH (%)

Up to 400 Eur	6
401–500 Eur	11
501–700 Eur	23
700-1000 Eur	26
Daugiau nei 1000 Eur	34

MARITAL STATUS (%)

Unmarried	29
Married / living in an unregistered marriage	59
Other	12

PLACE OF RESIDENCE (%)

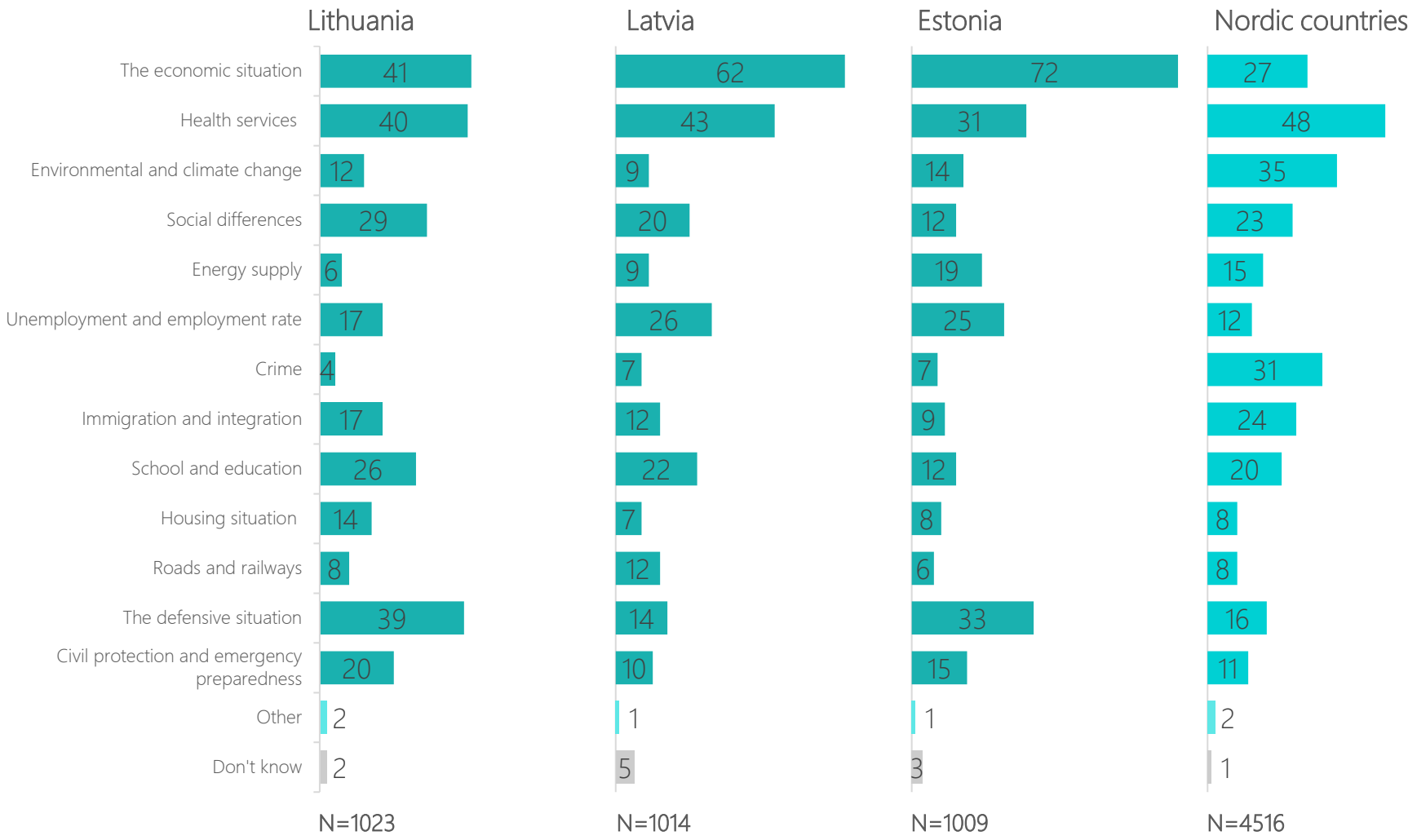
Tallinn	33
Other city	37
Rural area	30

CHILDREN IN THE HOUSEHOLD (%)

Up to 18 y.o.		Up to 6 y.o.	
1	14	Yes	44
2	17	No	56
3 and more	5		
None	64		

THE BIGGEST CHALLENGES FOR COUNTRIES (%)

What do you think are the biggest challenges facing your country today?



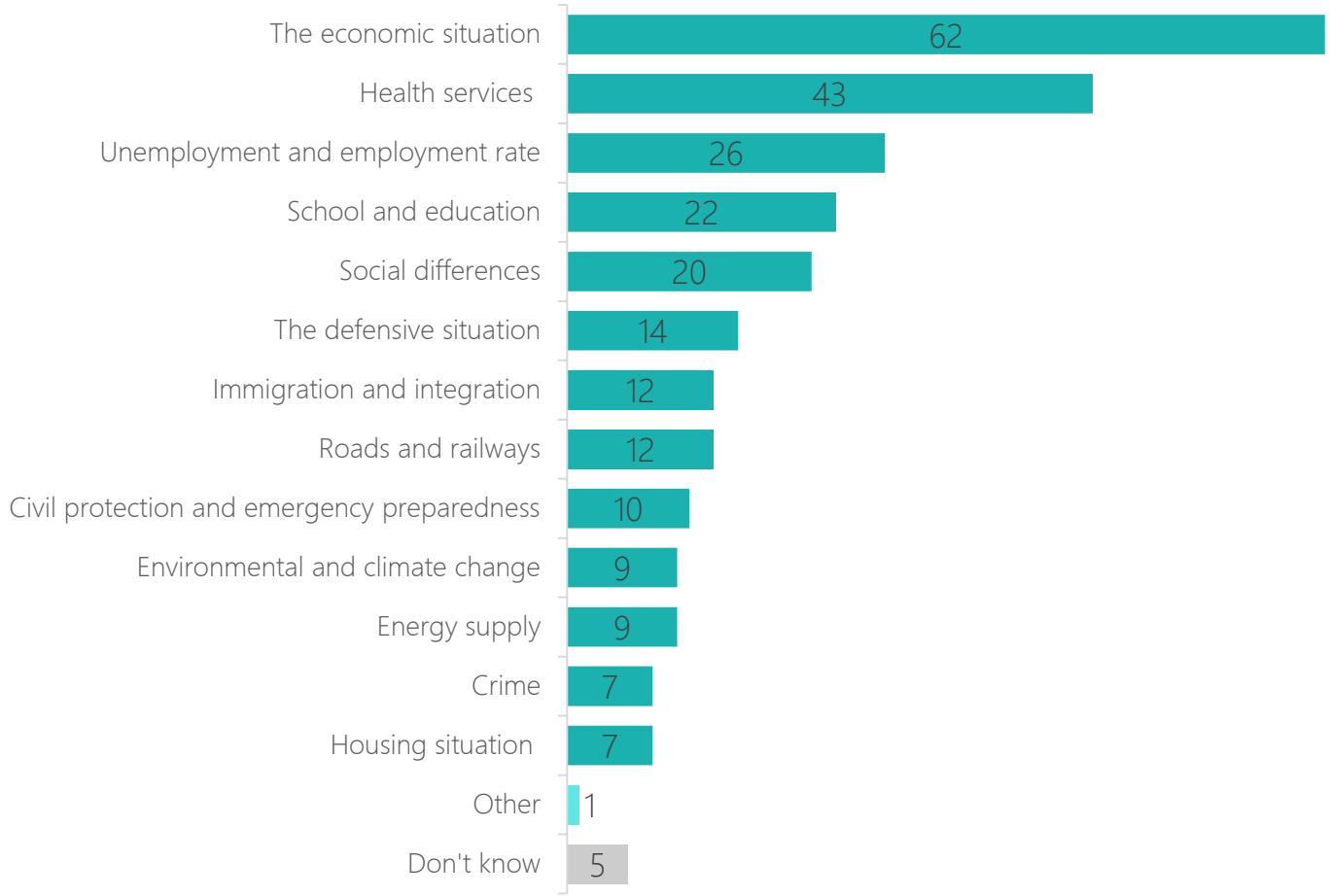
*Multiple answers possible; total exceeds 100 percent

THE BIGGEST CHALLENGES FOR COUNTRIES (%)

Latvia

What do you think are the biggest challenges facing your country today?

N=1014



The economic situation is more frequently identified by respondents with the highest level of education.

Health services – by women and highly educated respondents.

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Social differences as well as immigration and integration – by respondents without children.

The defensive situation – by highly educated respondents and residents of Riga.

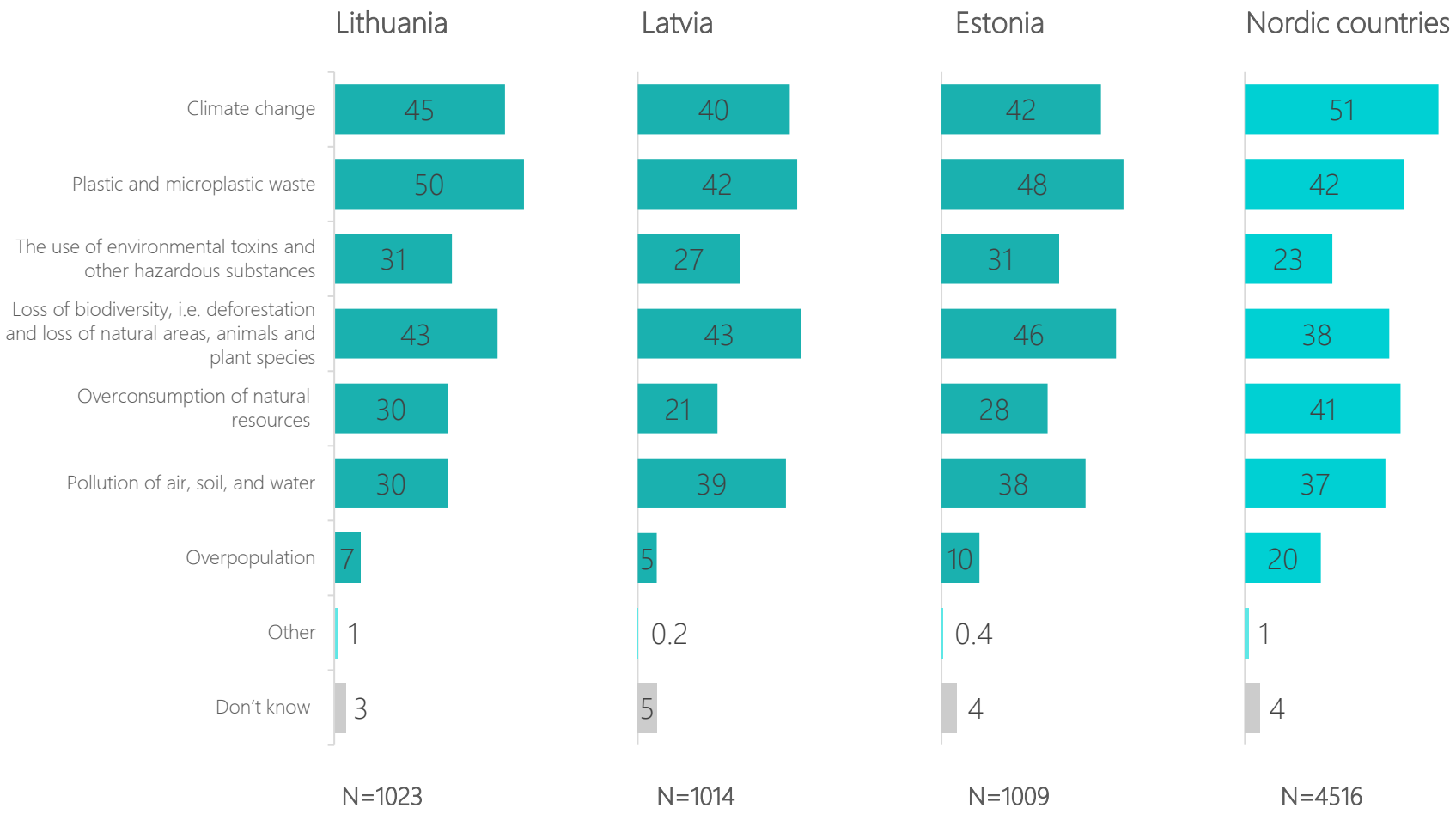
Civil protection – by respondents with the highest level of education.

When it comes to environmental and climate change, there are no statistically significant differences.

**Multiple answers possible; total exceeds 100 percent*

THE MOST IMPORTANT ENVIRONMENTAL PROBLEMS (%)

In your view, what are the most critical environmental issues we are facing today?

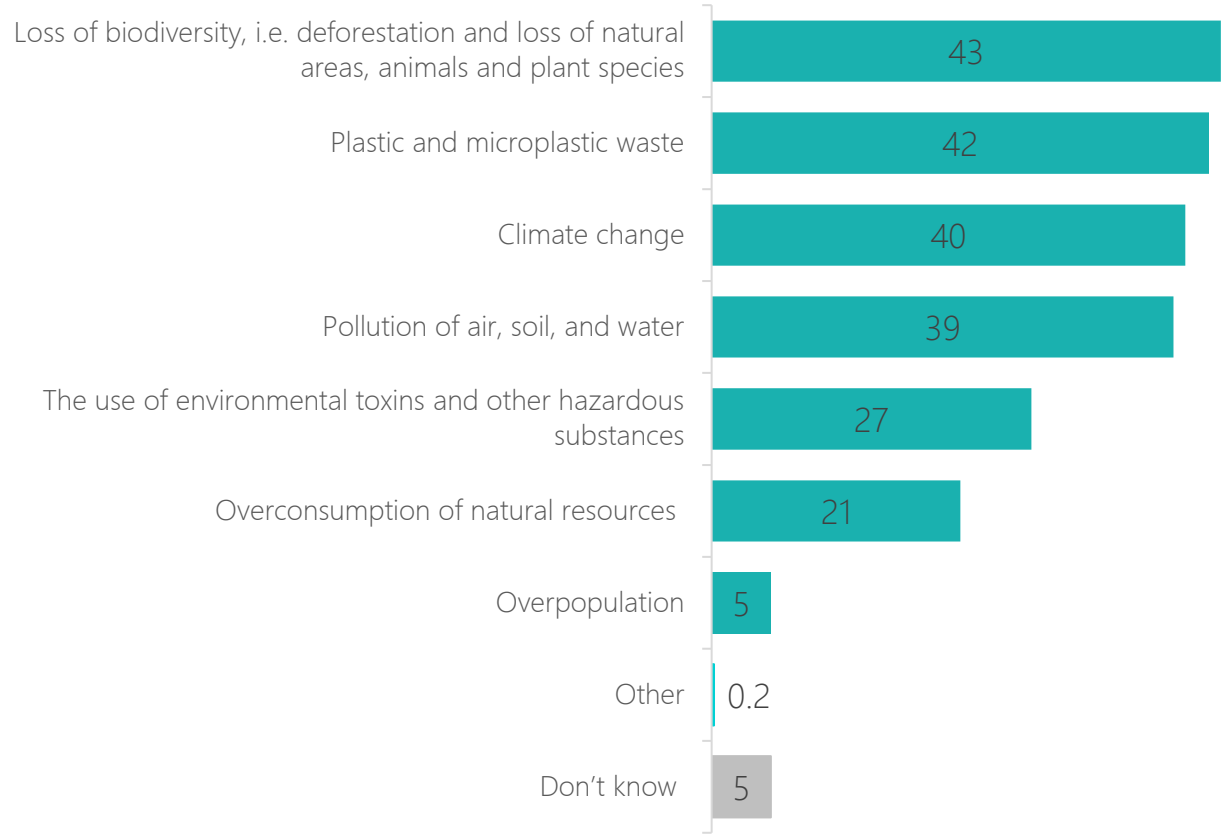


*Multiple answers possible; total exceeds 100 percent

THE MOST IMPORTANT ENVIRONMENTAL PROBLEMS (%)
Latvia

In your view, what are the most critical environmental issues we are facing today?

N=1014



Plastic and microplastic waste is more frequently identified by respondents with the highest level of education and residents of Riga.

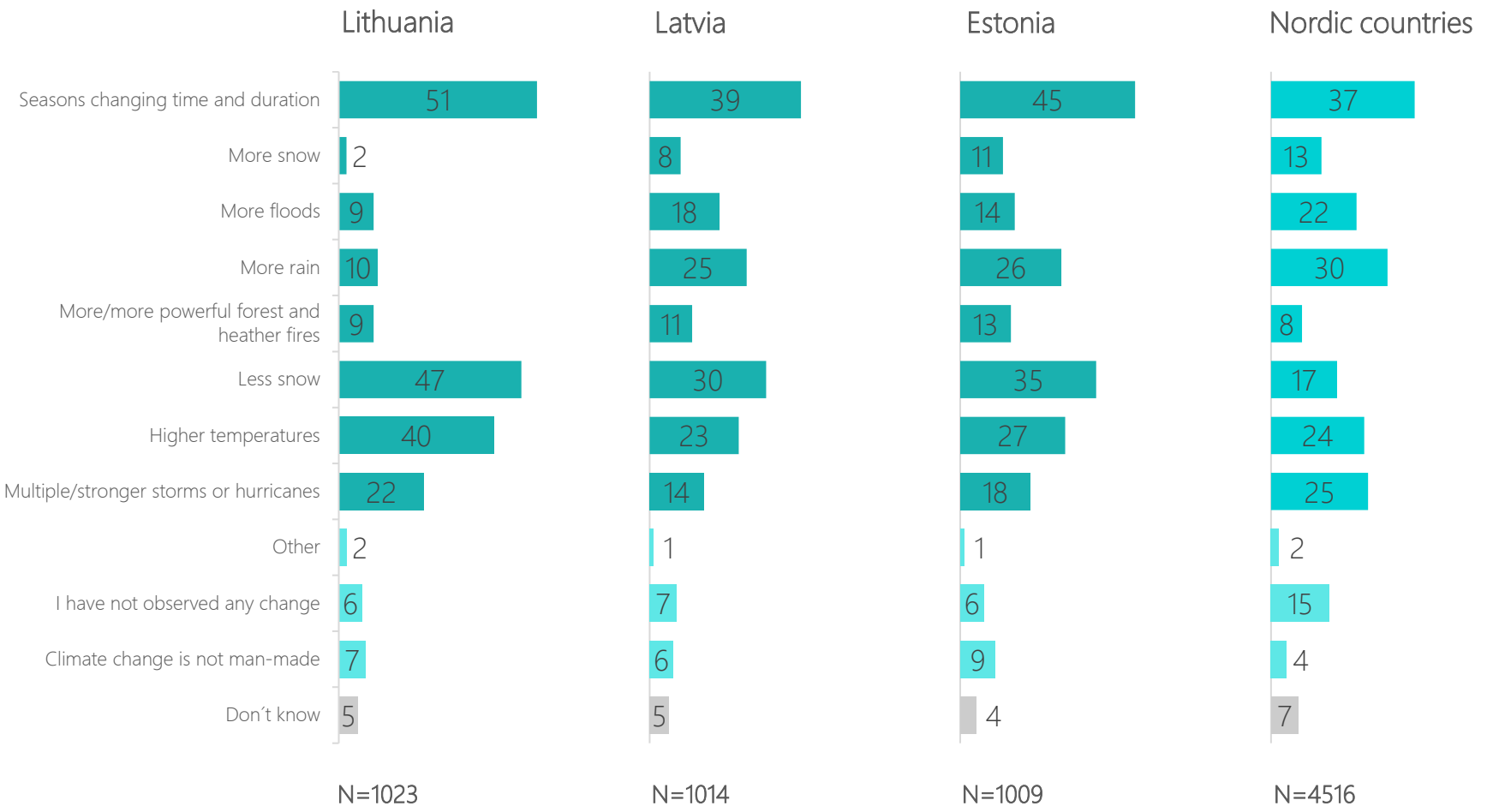
Pollution of air, soil, and water – by women and respondents with the highest level of education.

The use of environmental toxins and other hazardous substances – by respondents with the highest level of education.

**Multiple answers possible; total exceeds 100 percent*

OBSERVED CONSEQUENCES OF HUMAN-INDUCED CLIMATE CHANGE (%)

What changes have you observed in your municipality that you believe are a consequence of man-made climate change?

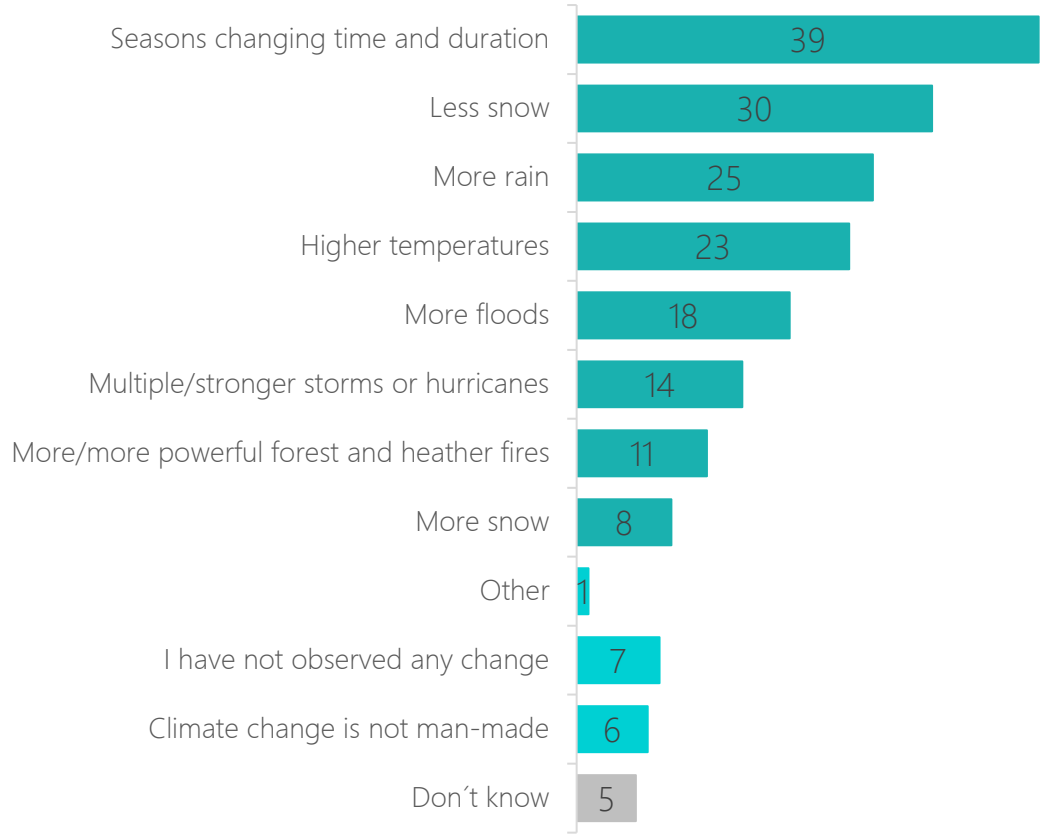


*Multiple answers possible; total exceeds 100 percent

OBSERVED CONSEQUENCES OF HUMAN-INDUCED CLIMATE CHANGE (%)
Latvia

What changes have you observed in your municipality that you believe are a consequence of man-made climate change?

N=1014



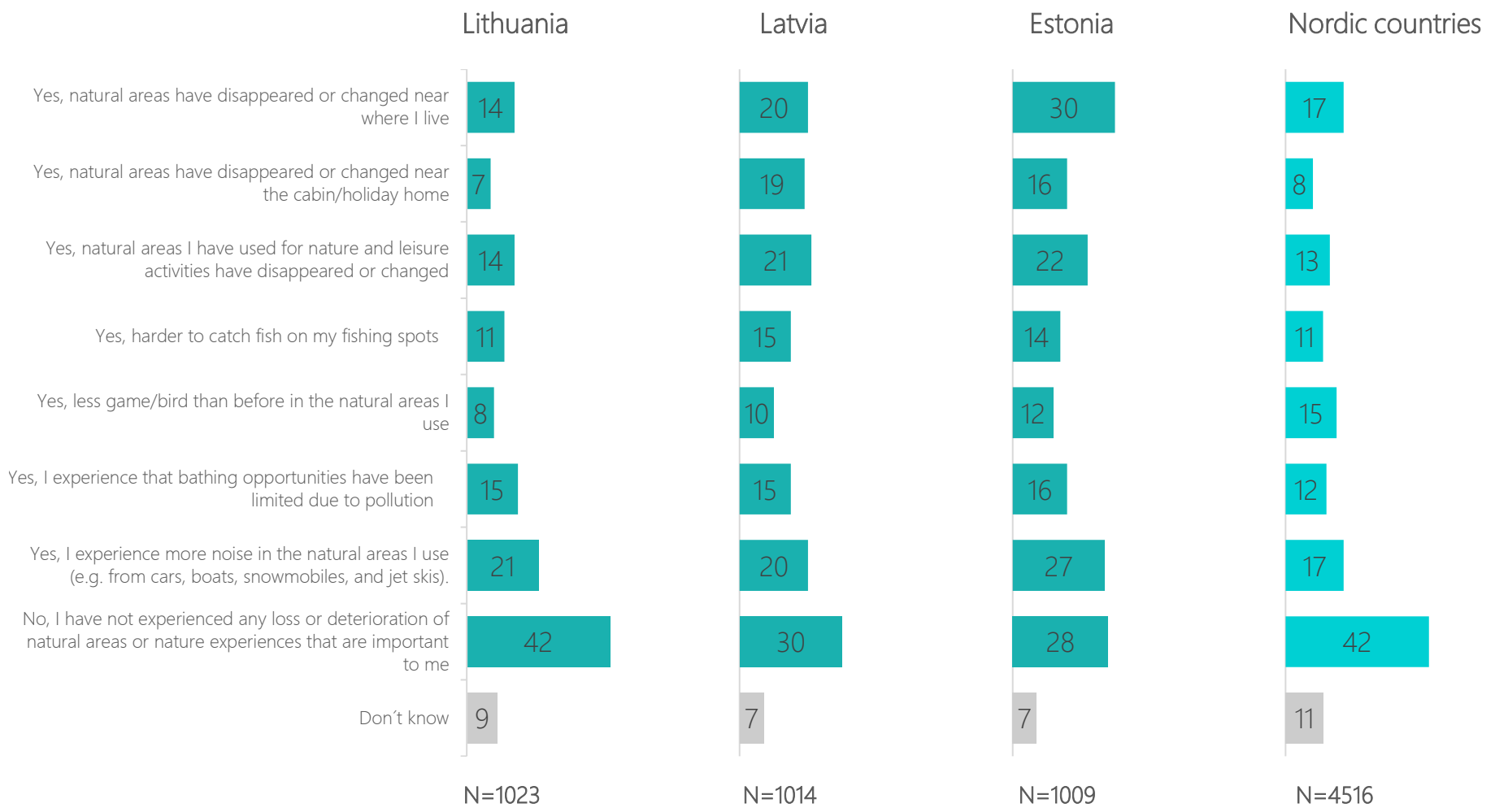
Seasons changing time and duration were more often noticed by women.

Higher temperatures were perceived by respondents with the highest level of education.

**Multiple answers possible; total exceeds 100 percent*

LOSS OR DETERIORATION OF NATURAL AREAS (%)

Have you experienced loss or deterioration of natural areas or nature experiences that are important to you?

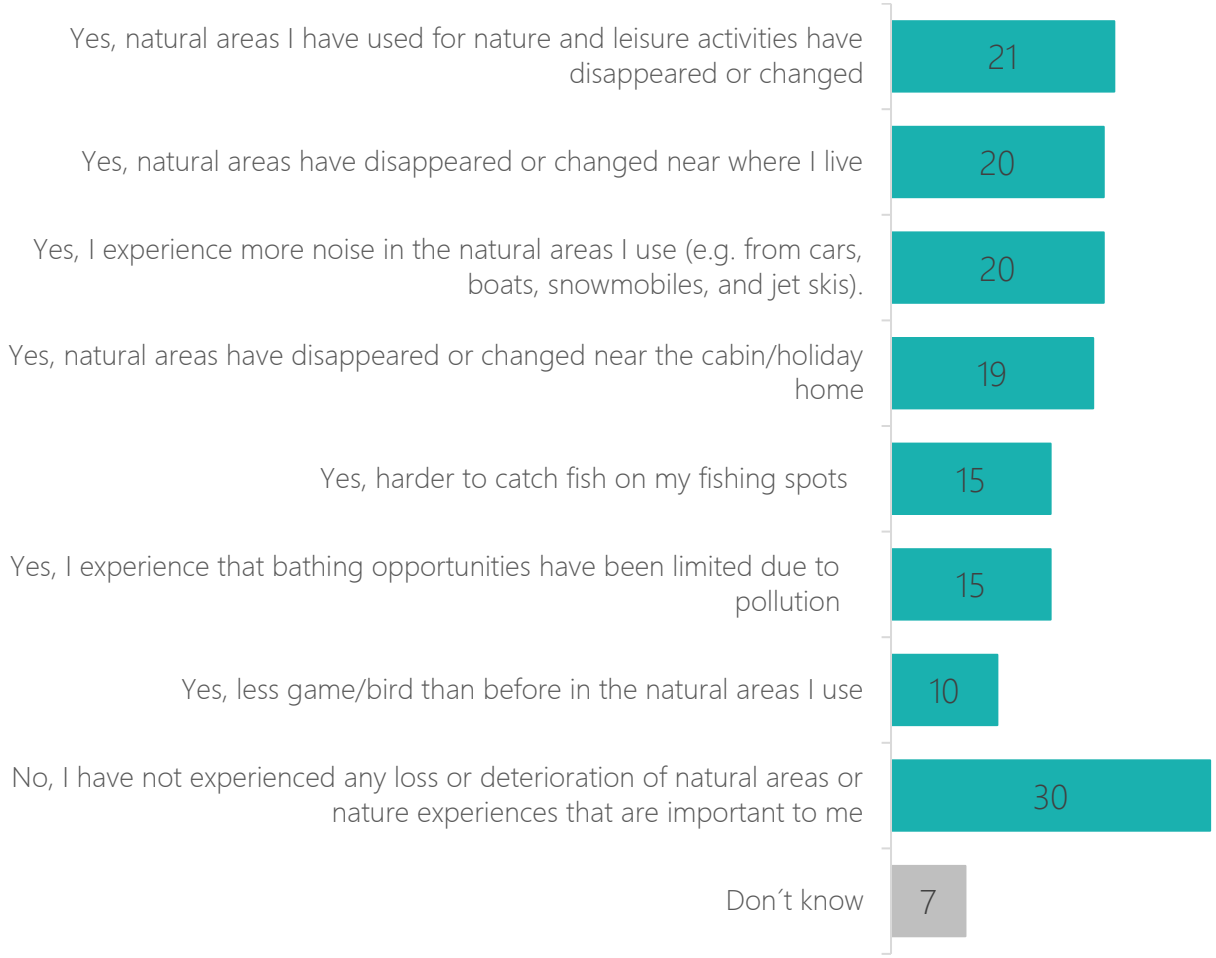


*Multiple answers possible; total exceeds 100 percent

LOSS OR DETERIORATION OF NATURAL AREAS (%)
Latvia

Have you experienced loss or deterioration of natural areas or nature experiences that are important to you?

N=1023



Women and residents of regional areas more often reported that natural areas near their place of residence have disappeared or changed.

Increased noise in the natural areas they use and limited bathing opportunities due to pollution were more frequently reported by women.

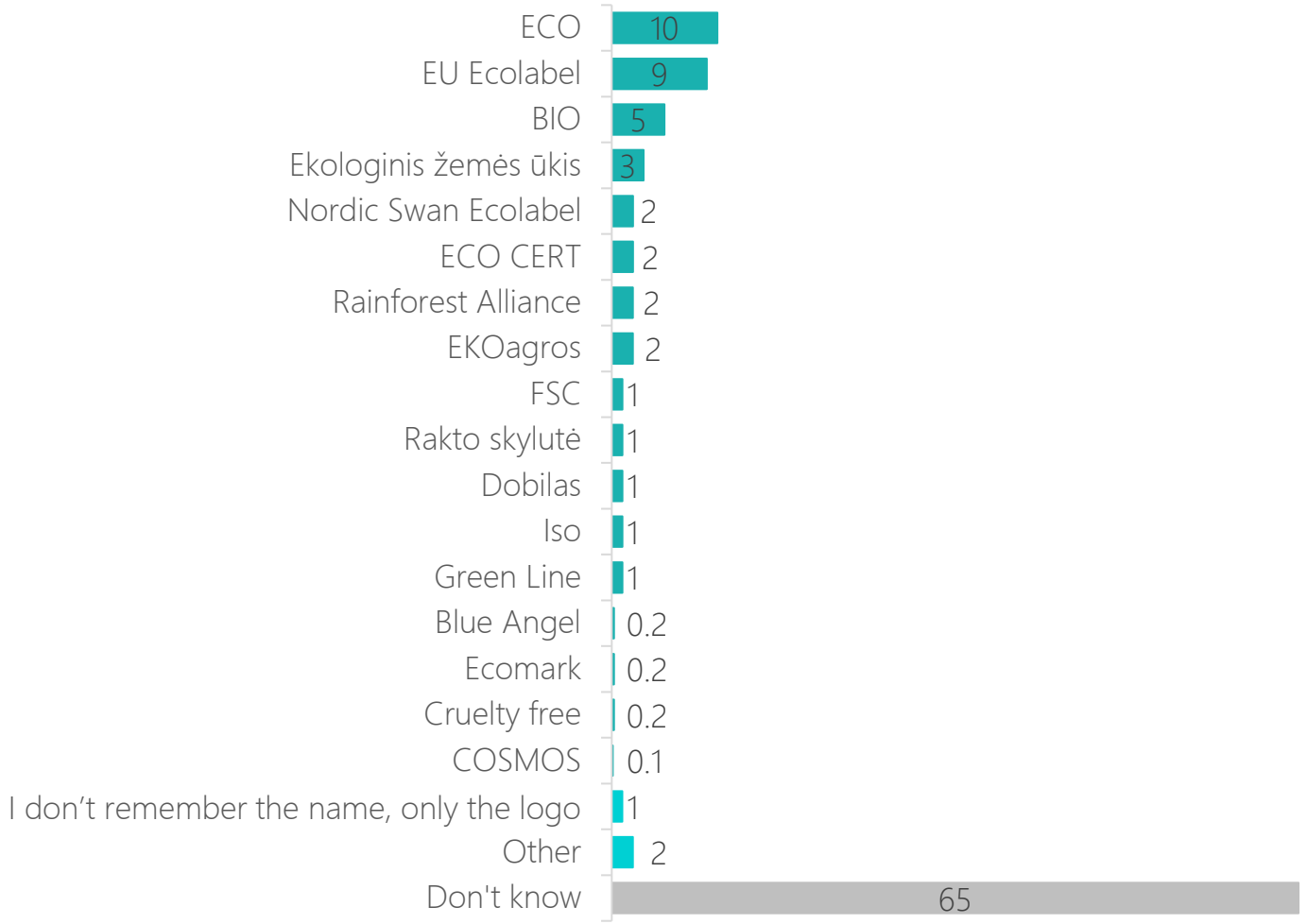
Respondents with the highest level of education and without children more often reported not having experienced any loss or deterioration of natural areas or nature experiences that are important to them.

**Multiple answers possible; total exceeds 100 percent*

AWARENESS OF ECOLOGICAL CERTIFICATION LABELS (%)
Spontaneous awareness. Lithuania

Which ecolabels do you know?

N=1023

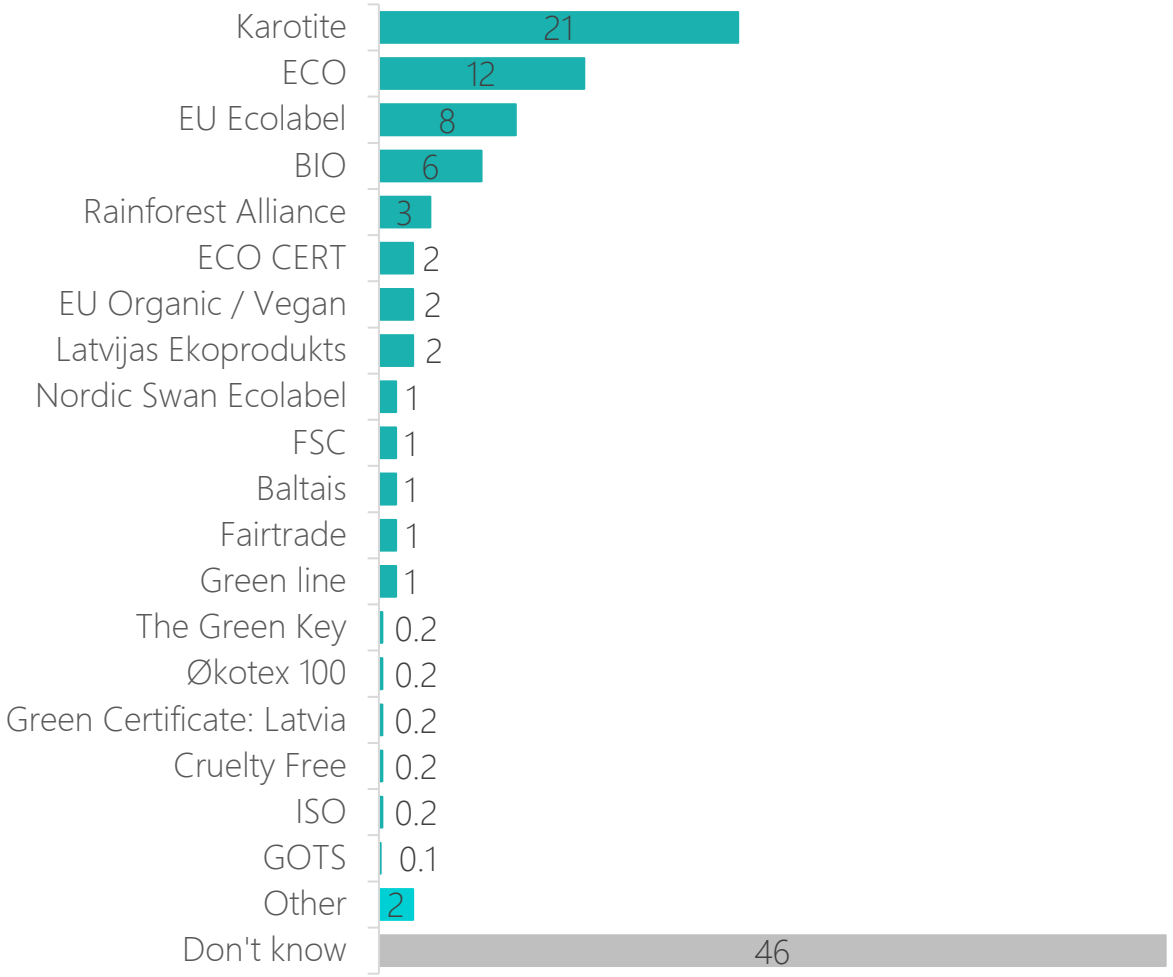


*Multiple answers possible; total exceeds 100 percent

AWARENESS OF ECOLOGICAL CERTIFICATION LABELS (%)
Spontaneous awareness. Latvia

Which ecolabels do you know?

N=1014



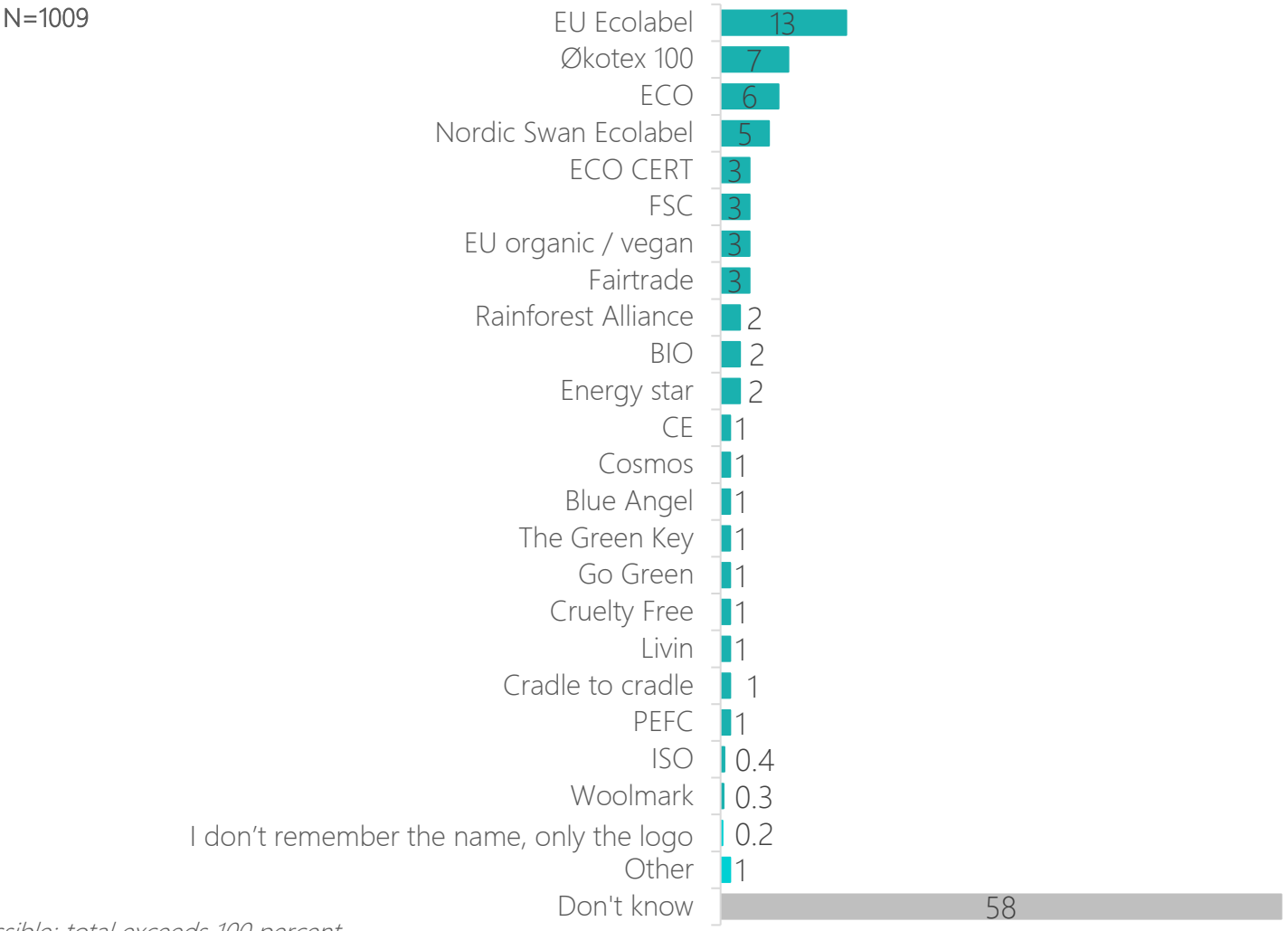
BIO ecological certification label is more frequently mentioned spontaneously by respondents with the highest level of education.

*Multiple answers possible; total exceeds 100 percent

AWARENESS OF ECOLOGICAL CERTIFICATION LABELS (%)
Spontaneous awareness. Estonia

Which ecolabels do you know?

N=1009

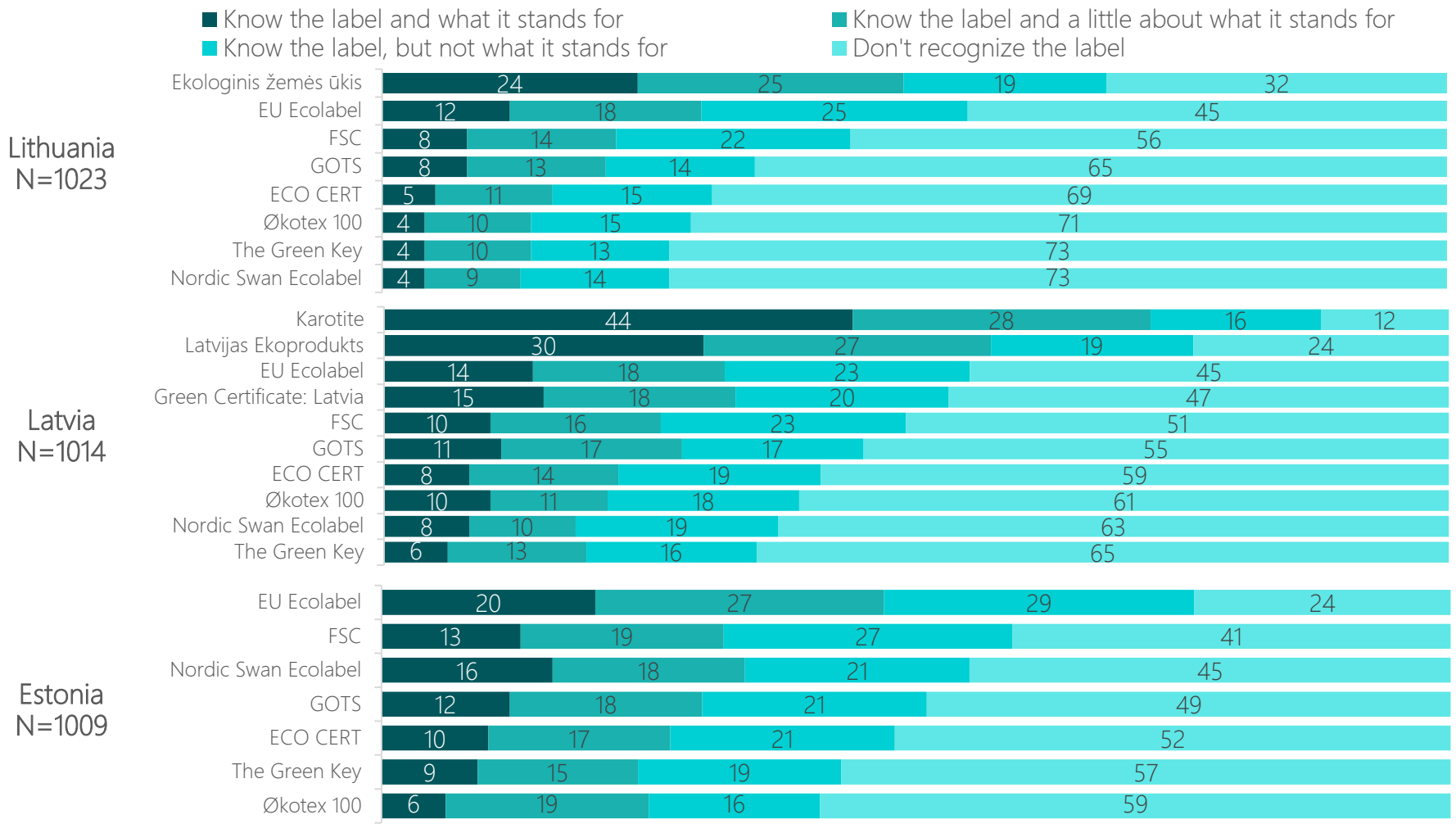


EU Ecolabel is more frequently mentioned by residents of Tallinn.

*Multiple answers possible; total exceeds 100 percent

AWARENESS OF ECOLOGICAL CERTIFICATION LABELS (%)

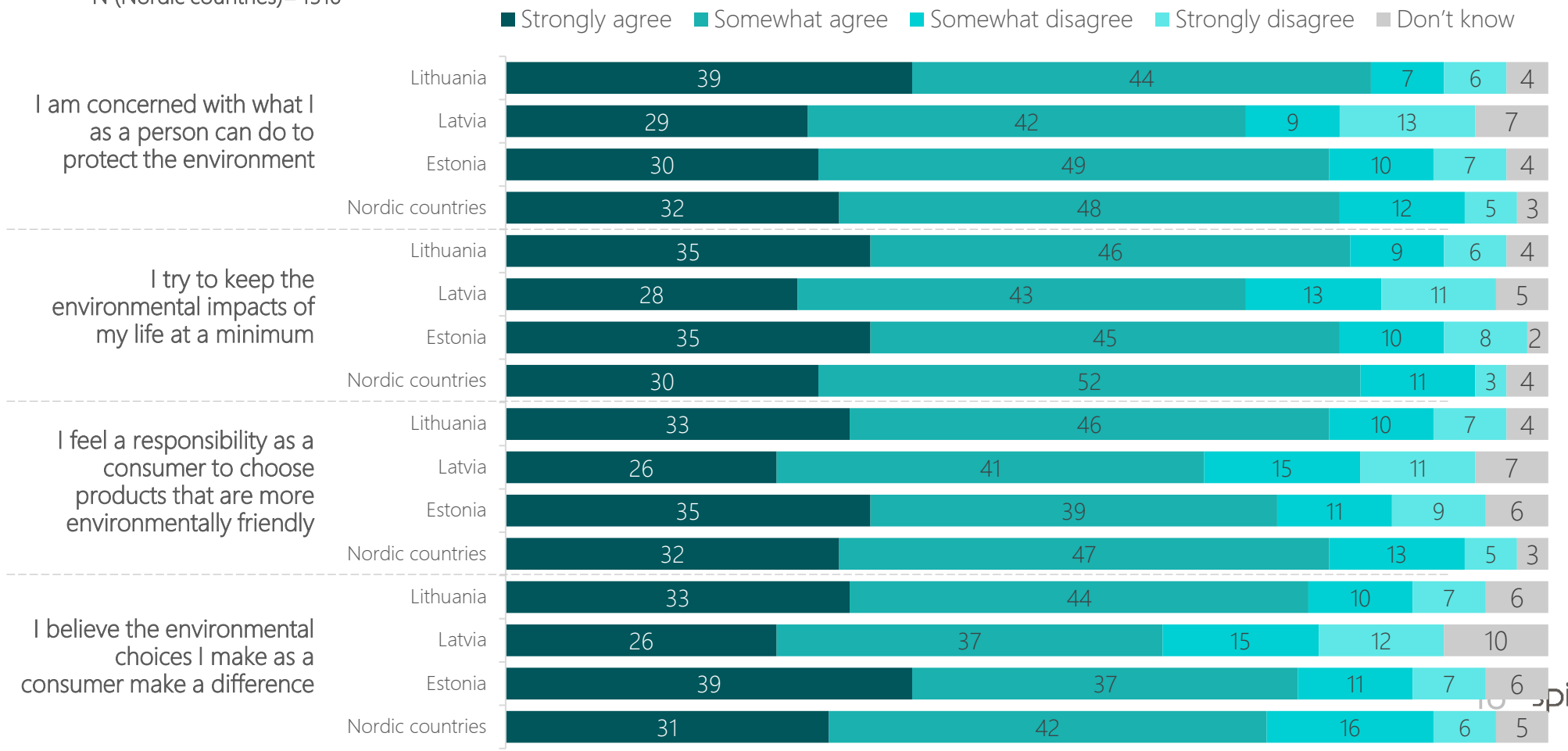
How well would you say you know the following certification labels?



ASSESSMENT OF PERSONAL ENVIRONMENTAL IMPACT (%)

Do you agree or disagree with the following statements?

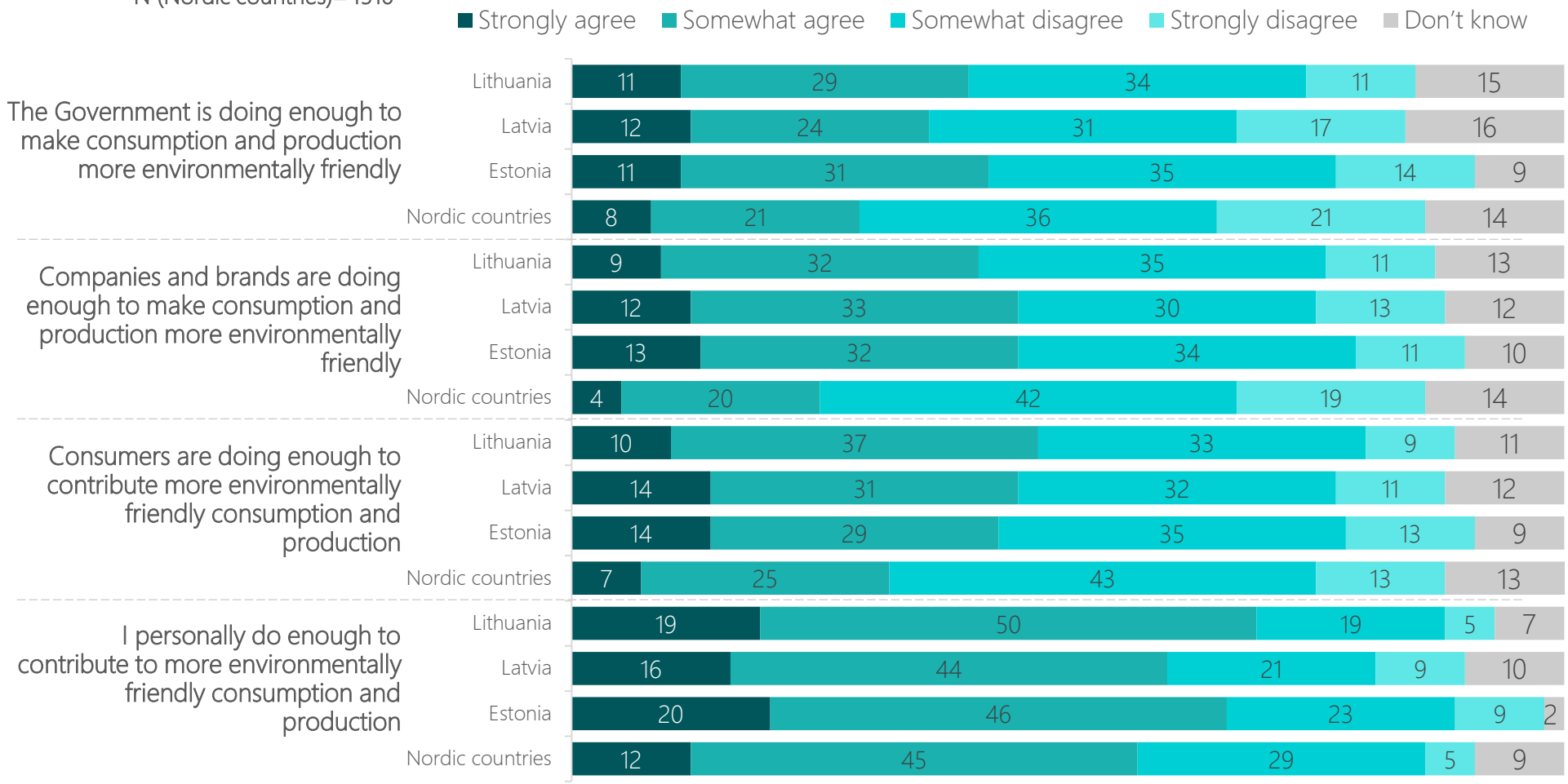
N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009
N (Nordic countries)=4516



ASSESSMENT OF DIFFERENT GROUPS' CONTRIBUTION TO SUSTAINABILITY (%)

Do you agree or disagree with the following statements?

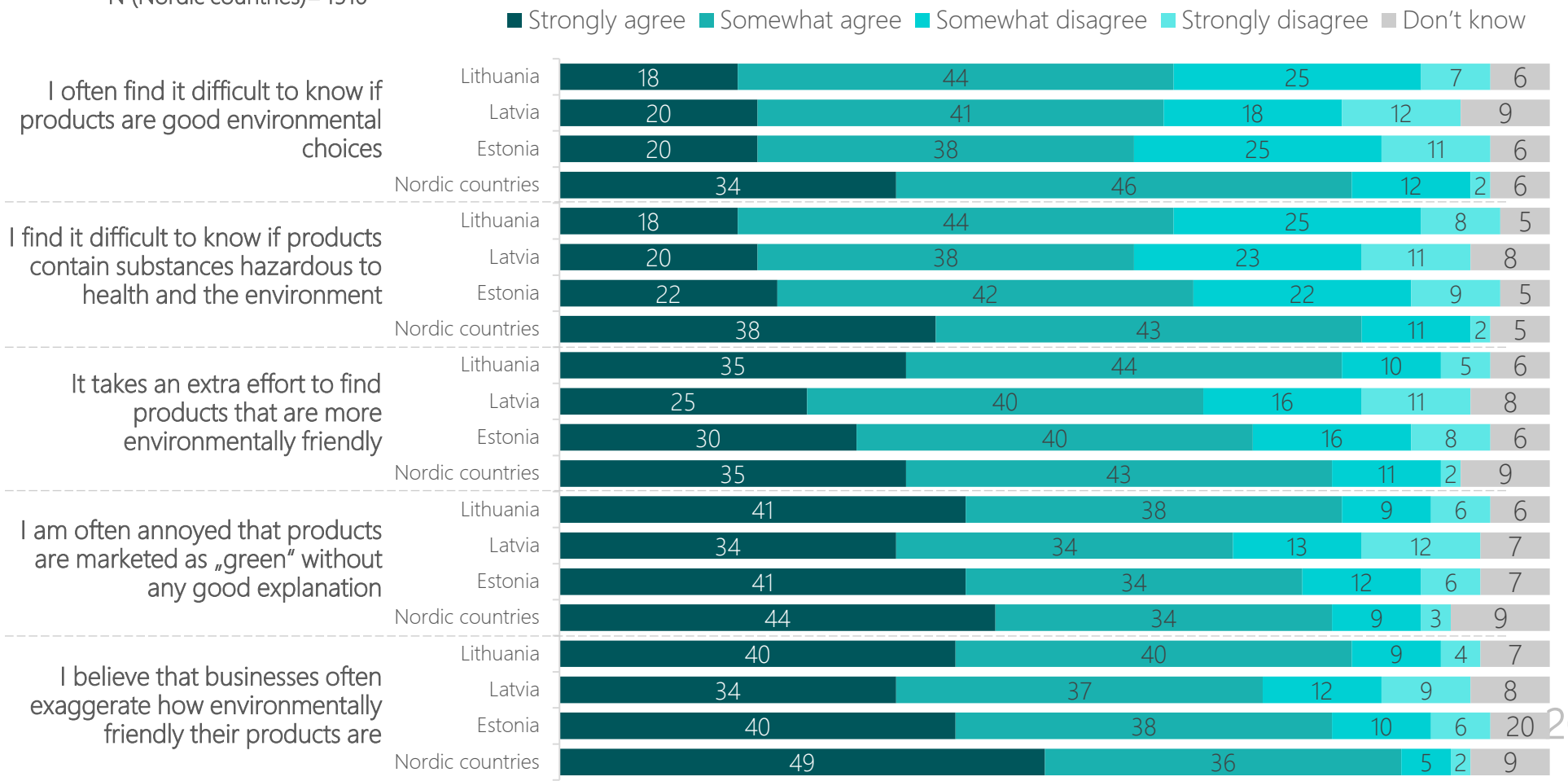
N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009
N (Nordic countries)=4516



ATTITUDES TOWARDS PRODUCT LABELING (%)

Do you agree or disagree with the following statements?

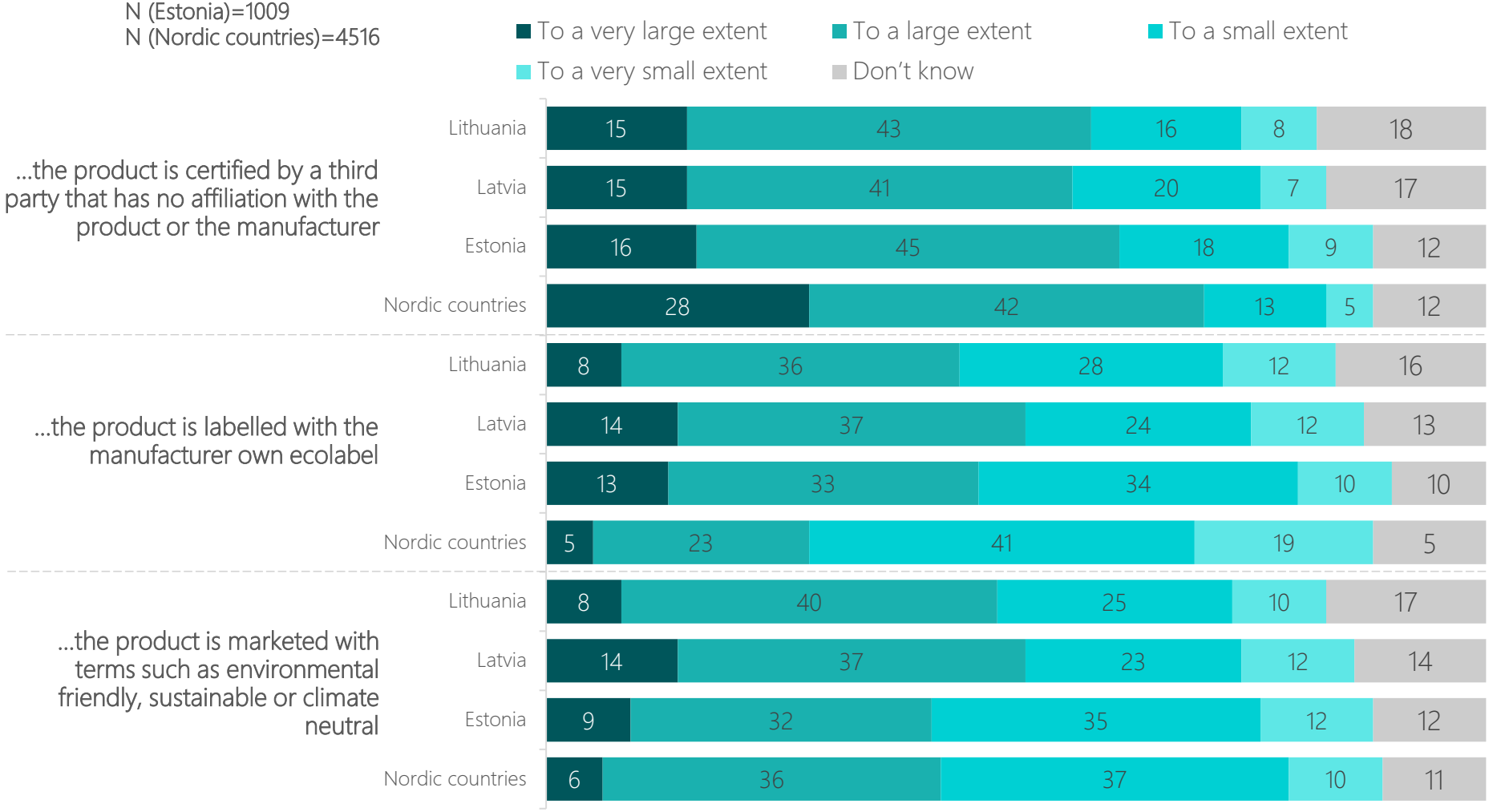
N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009
N (Nordic countries)=4516



TRUST IN PRODUCT LABELING (%)

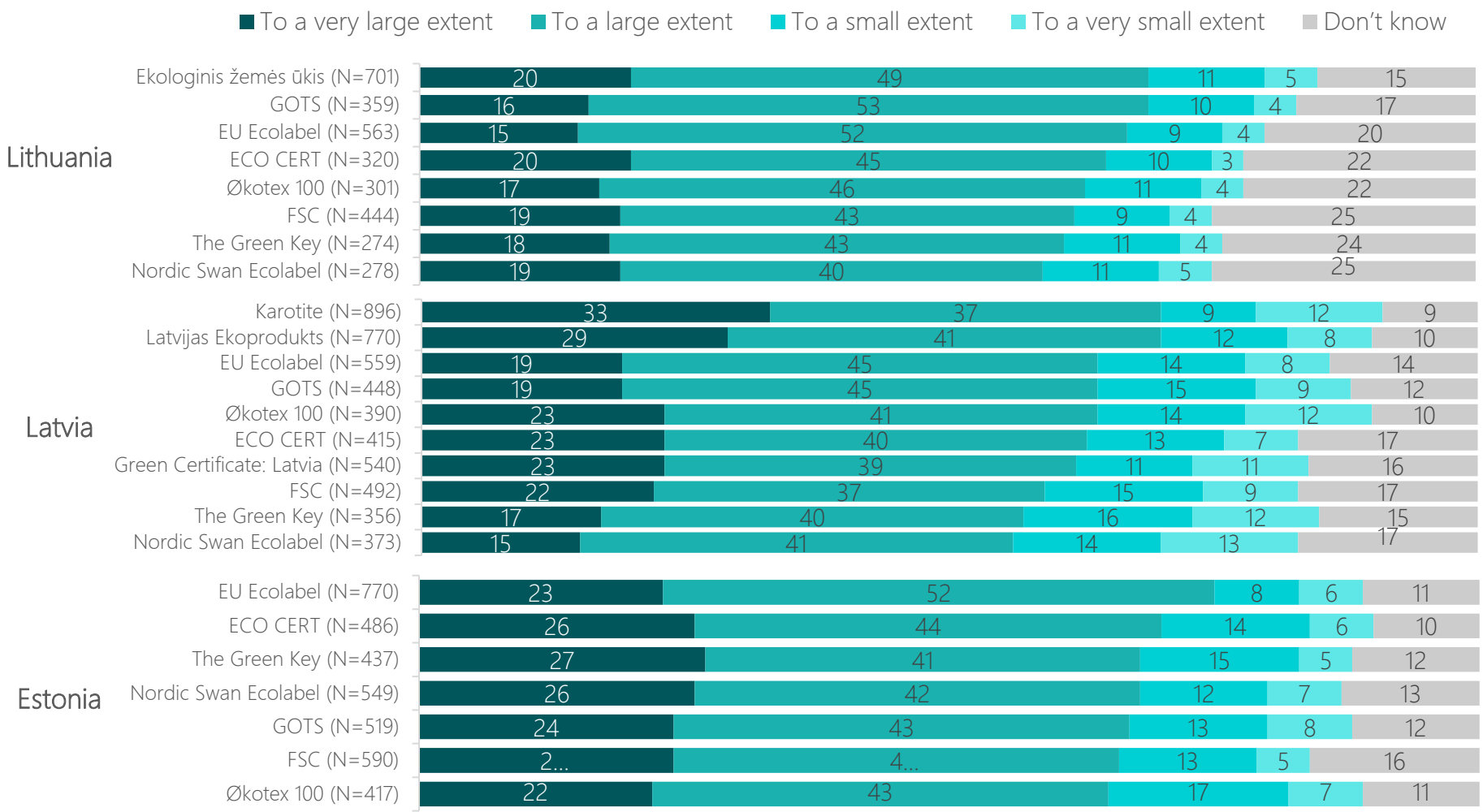
To what extent do you trust a product to be a good environmental choice when…?

N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009
N (Nordic countries)=4516



TRUST IN ECOLOGICAL CERTIFICATION LABELS ON PRODUCTS (%)

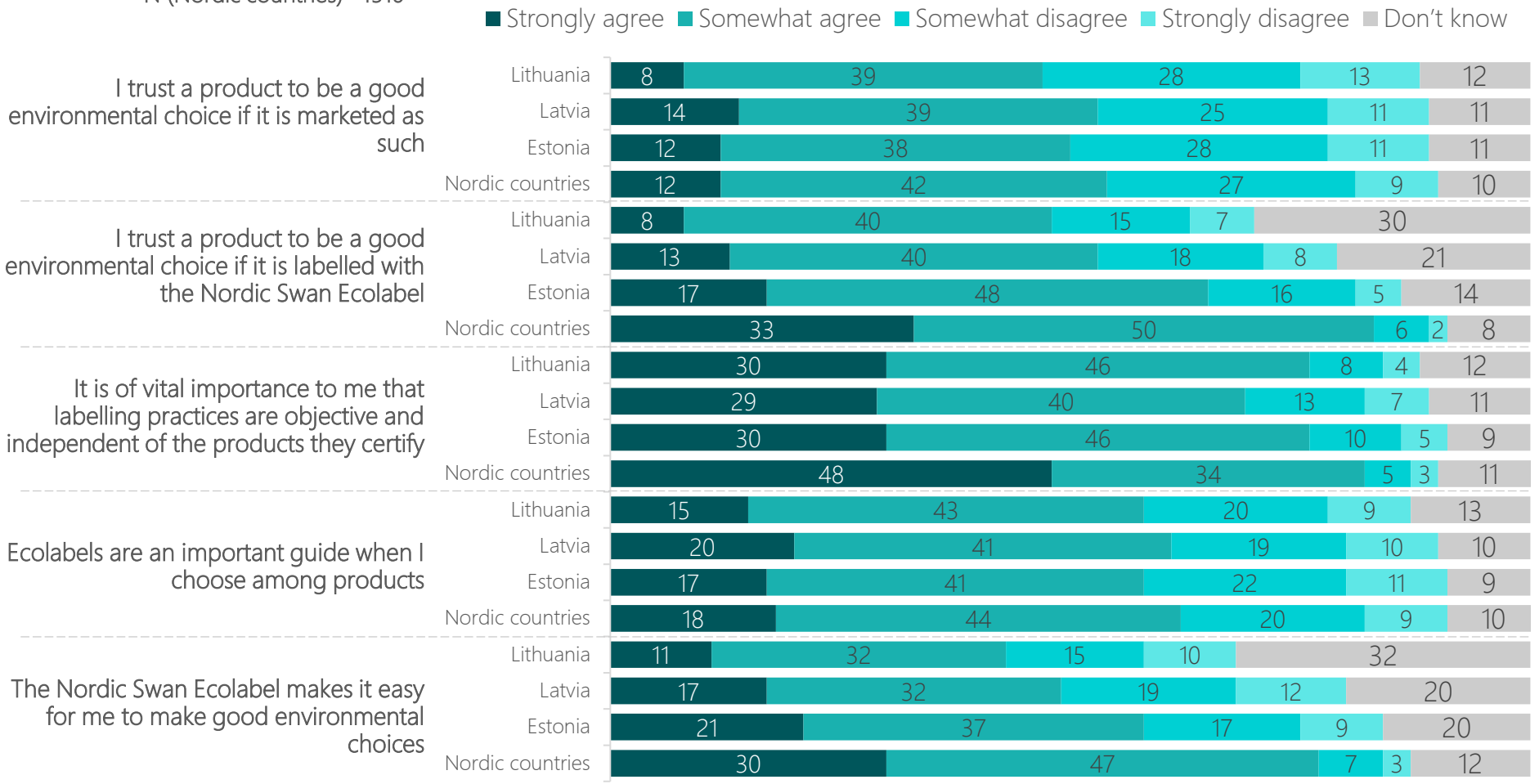
To what extent do you trust the following labels?



ASSESSMENT OF THE IMPORTANCE OF ENVIRONMENTAL LABELS (%)

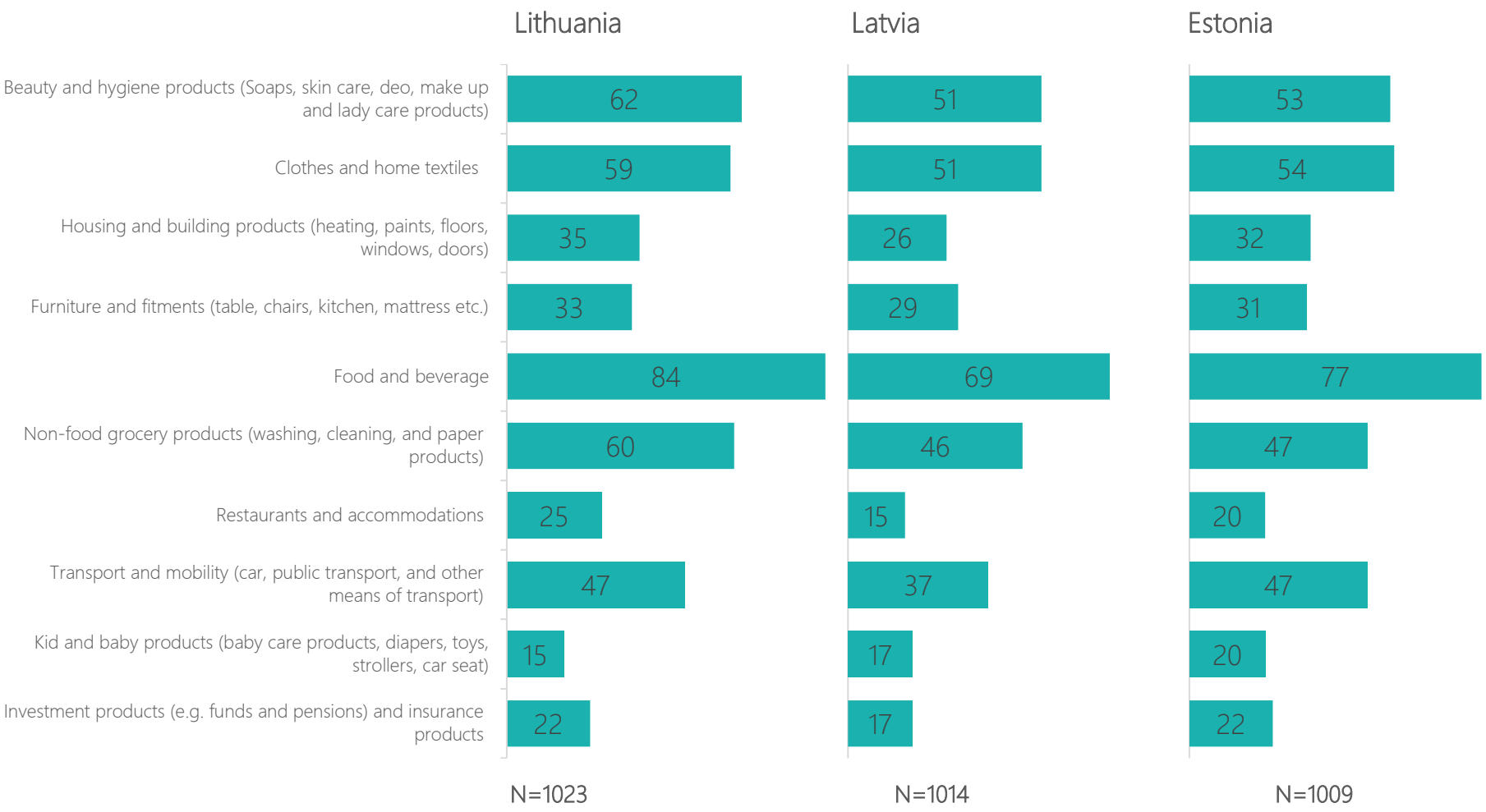
Do you agree or disagree with the following statements?

N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009
N (Nordic countries)=4516



RELEVANT PRODUCT CATEGORIES (%)

Which of the following are relevant product areas for you?

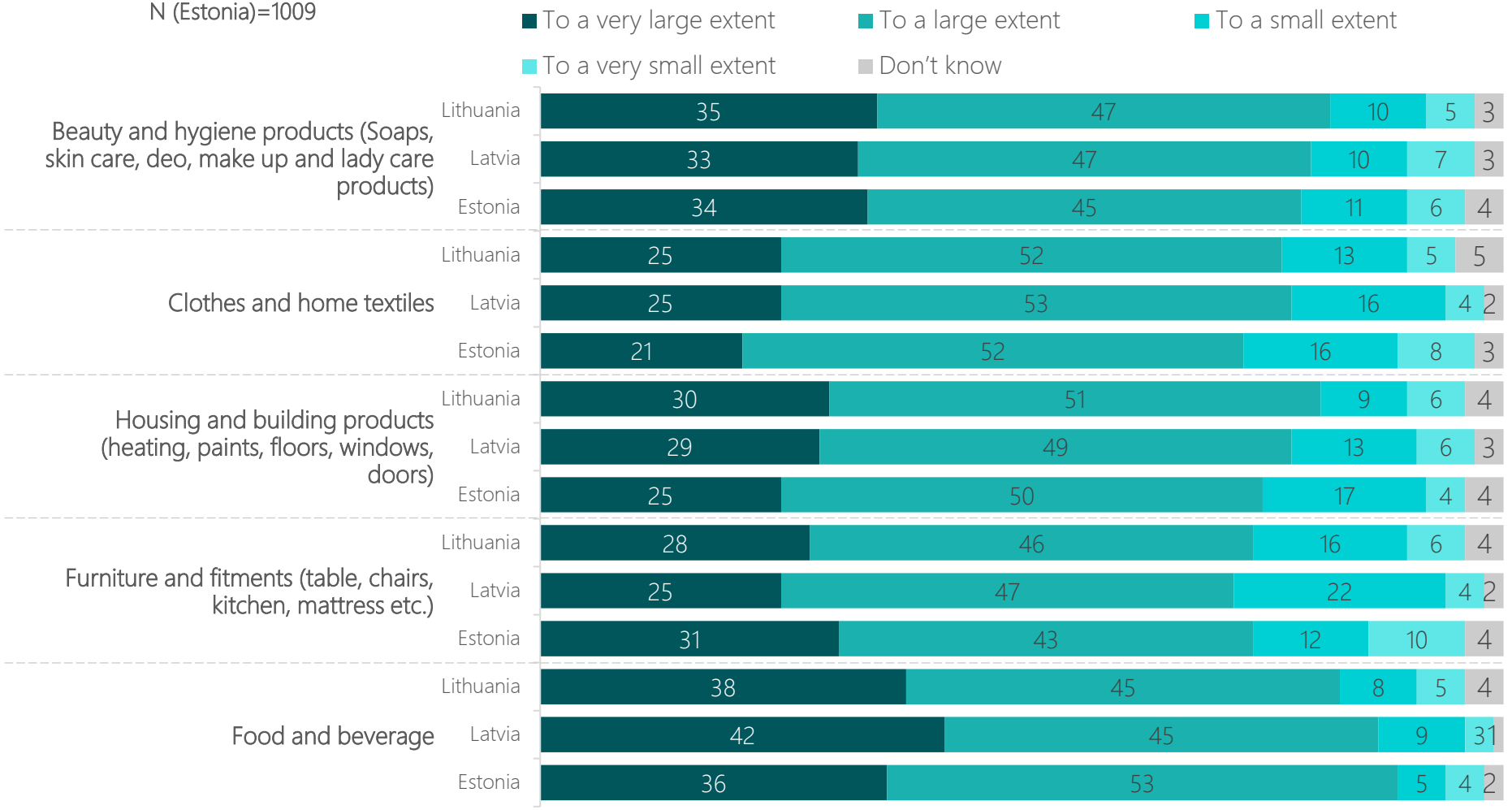


*Multiple answers possible; total exceeds 100 percent

ENVIRONMENTALLY FRIENDLY PRODUCT CHOICE IMPORTANCE (%) I/II

To what extent is it important for you to choose environmentally friendly within the following product areas?

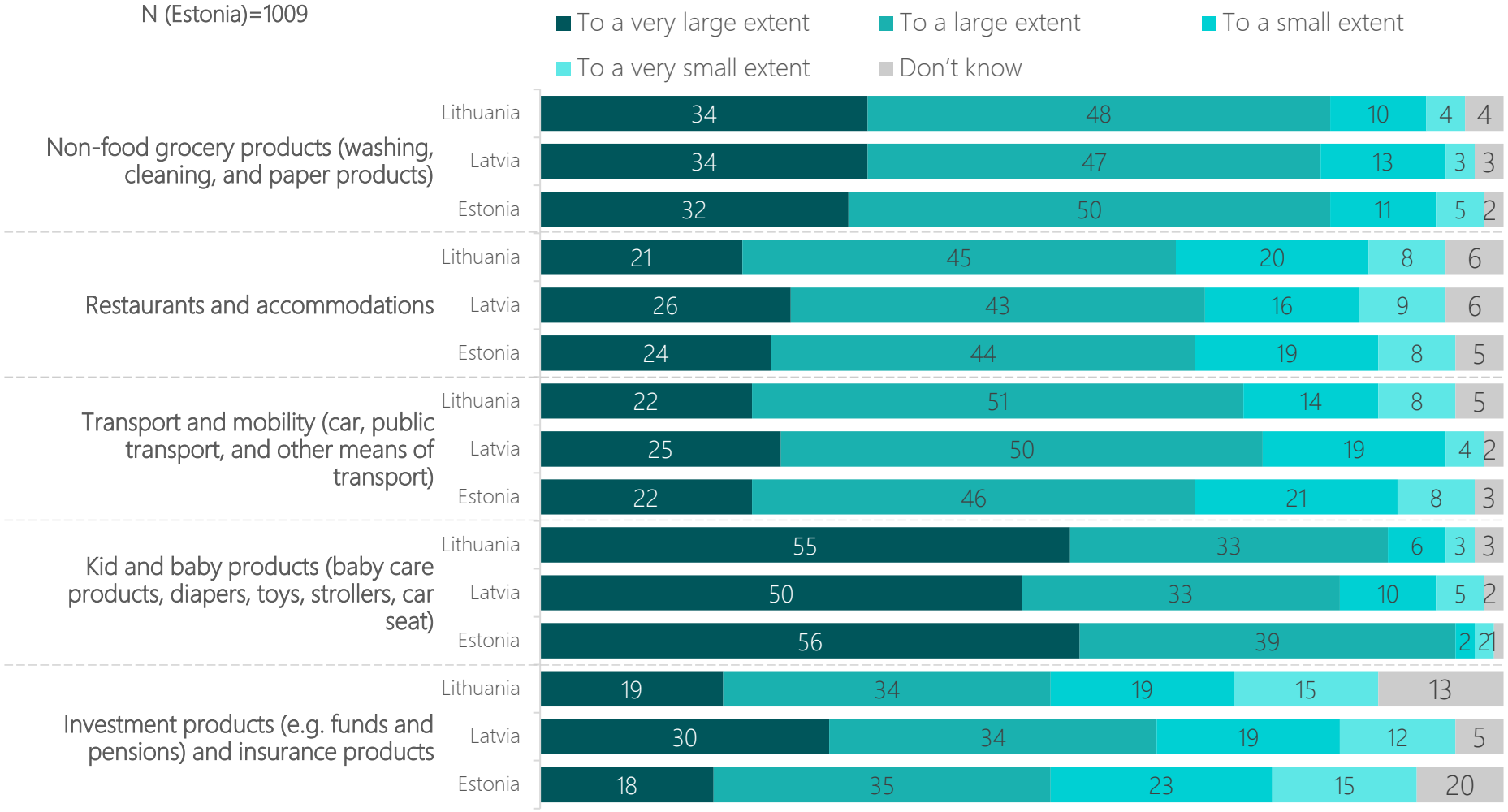
N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009



ENVIRONMENTALLY FRIENDLY PRODUCT CHOICE IMPORTANCE (%) II/II

To what extent is it important for you to choose environmentally friendly within the following product areas?

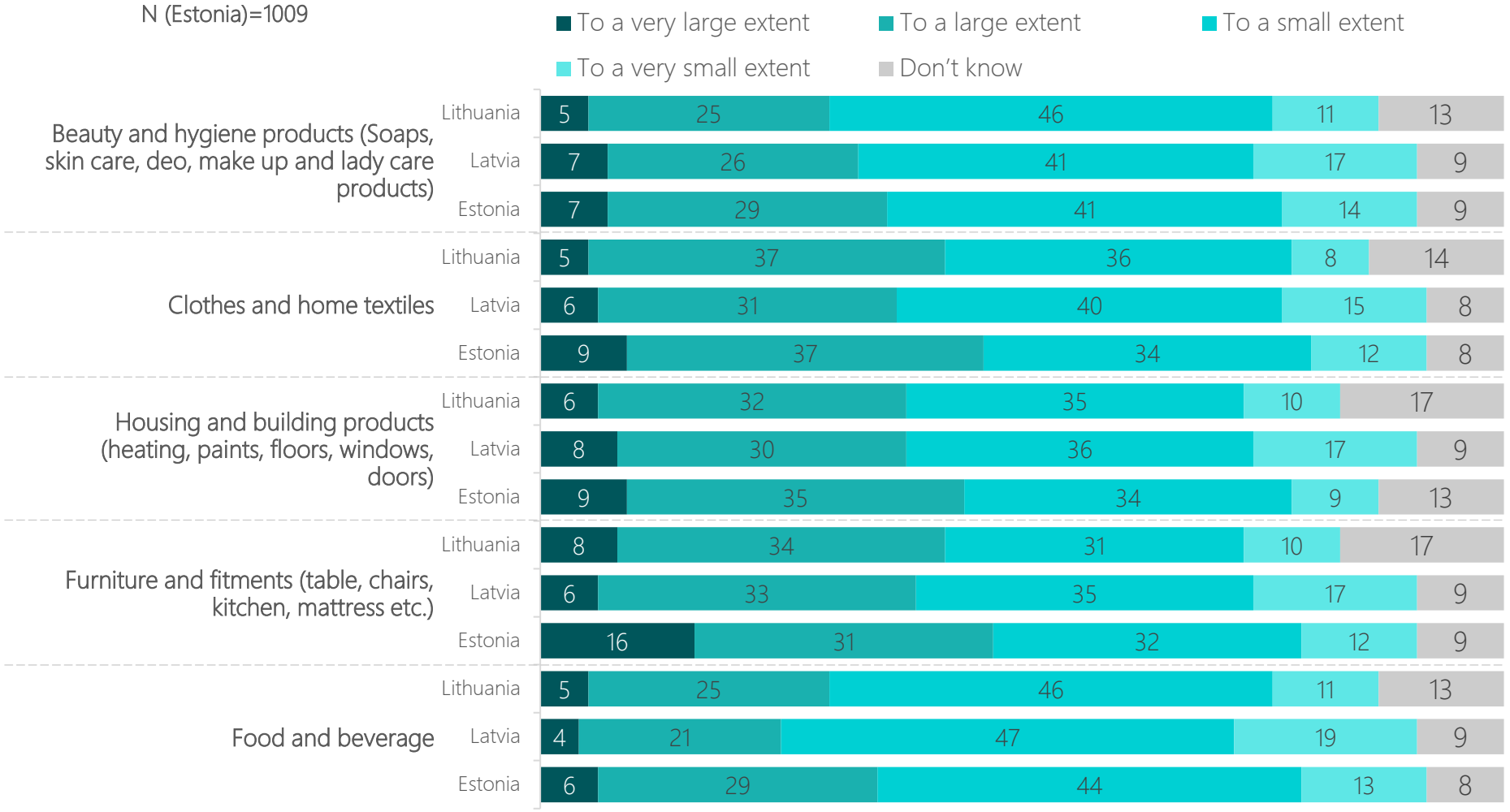
N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009



DIFFICULTIES IN FINDING ENVIRONMENTALLY FRIENDLY PRODUCTS (%) I/II

To what extent do you find it challenging to find products that are good environmental choices within the following product areas?

N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009



DIFFICULTIES IN FINDING ENVIRONMENTALLY FRIENDLY PRODUCTS (%) II/II

To what extent do you find it challenging to find products that are good environmental choices within the following product areas?

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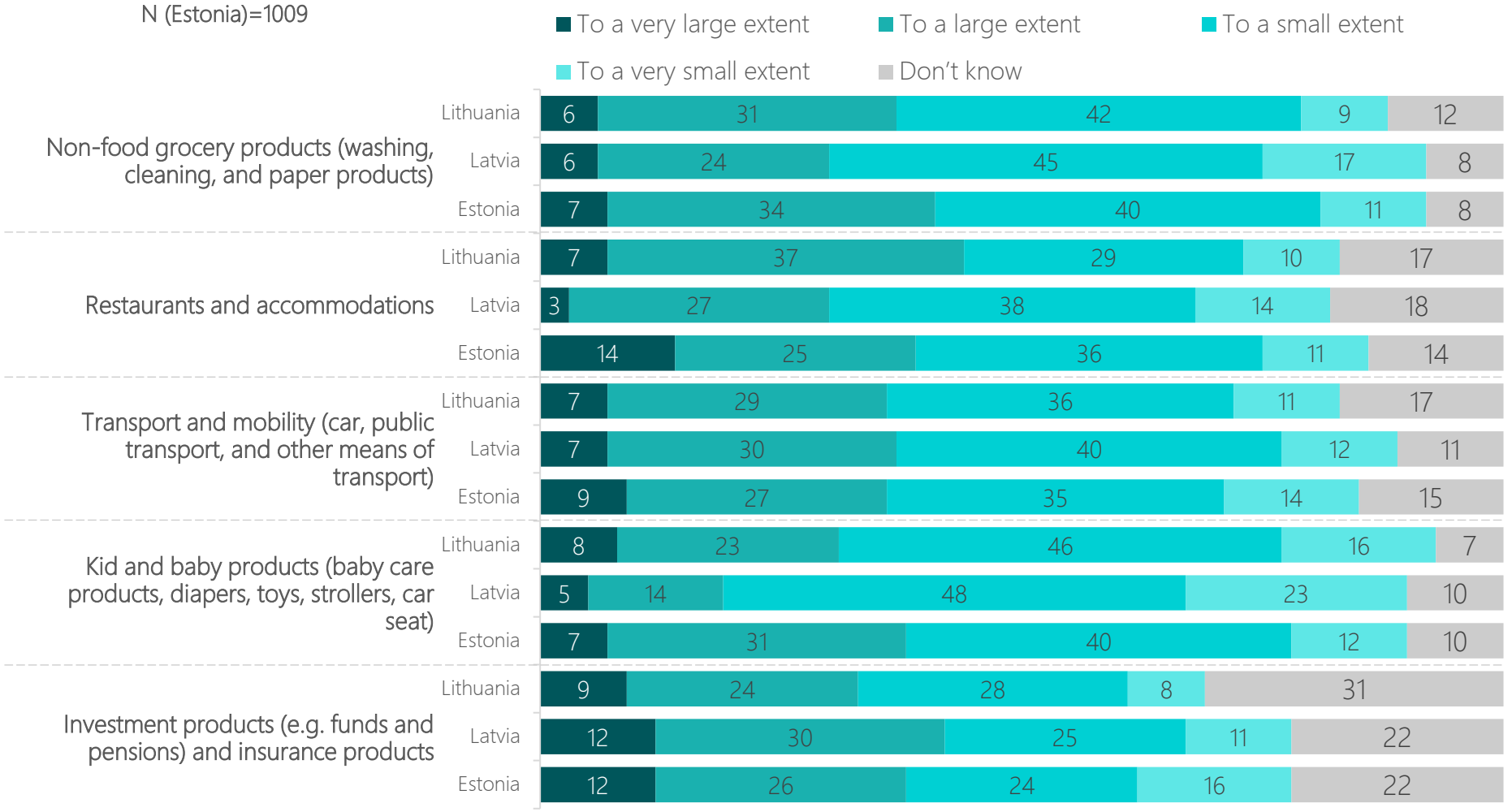
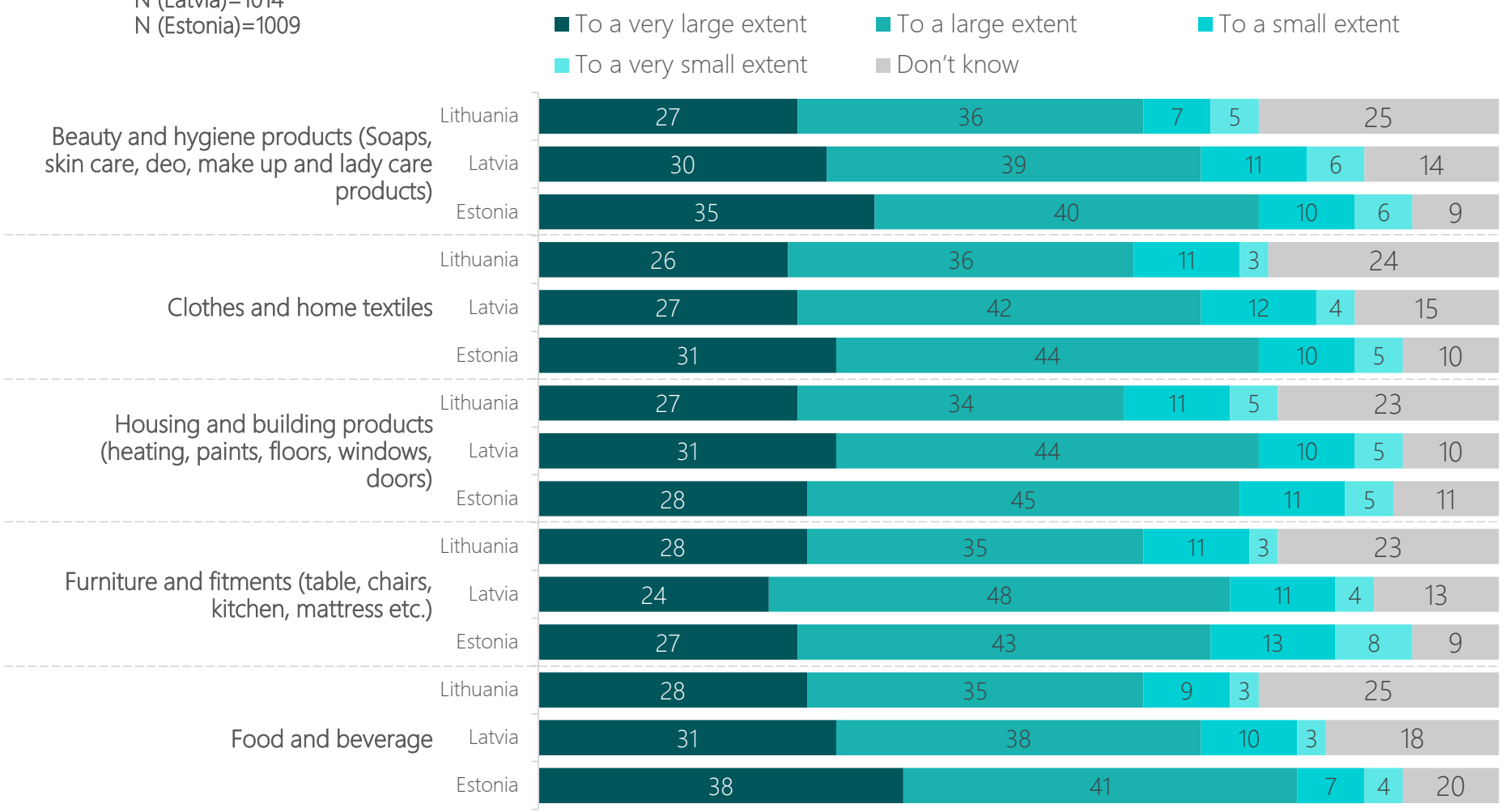
N (Estonia)=1009



LIKELIHOOD OF CHOOSING A PRODUCT WITH THE NORDIC SWAN ECOLABEL (%) I/II

If the price and appearance were the same, how likely would you be to choose a product labelled with the Nordic Swan Ecolabel, if such a product were available, when buying the following products?

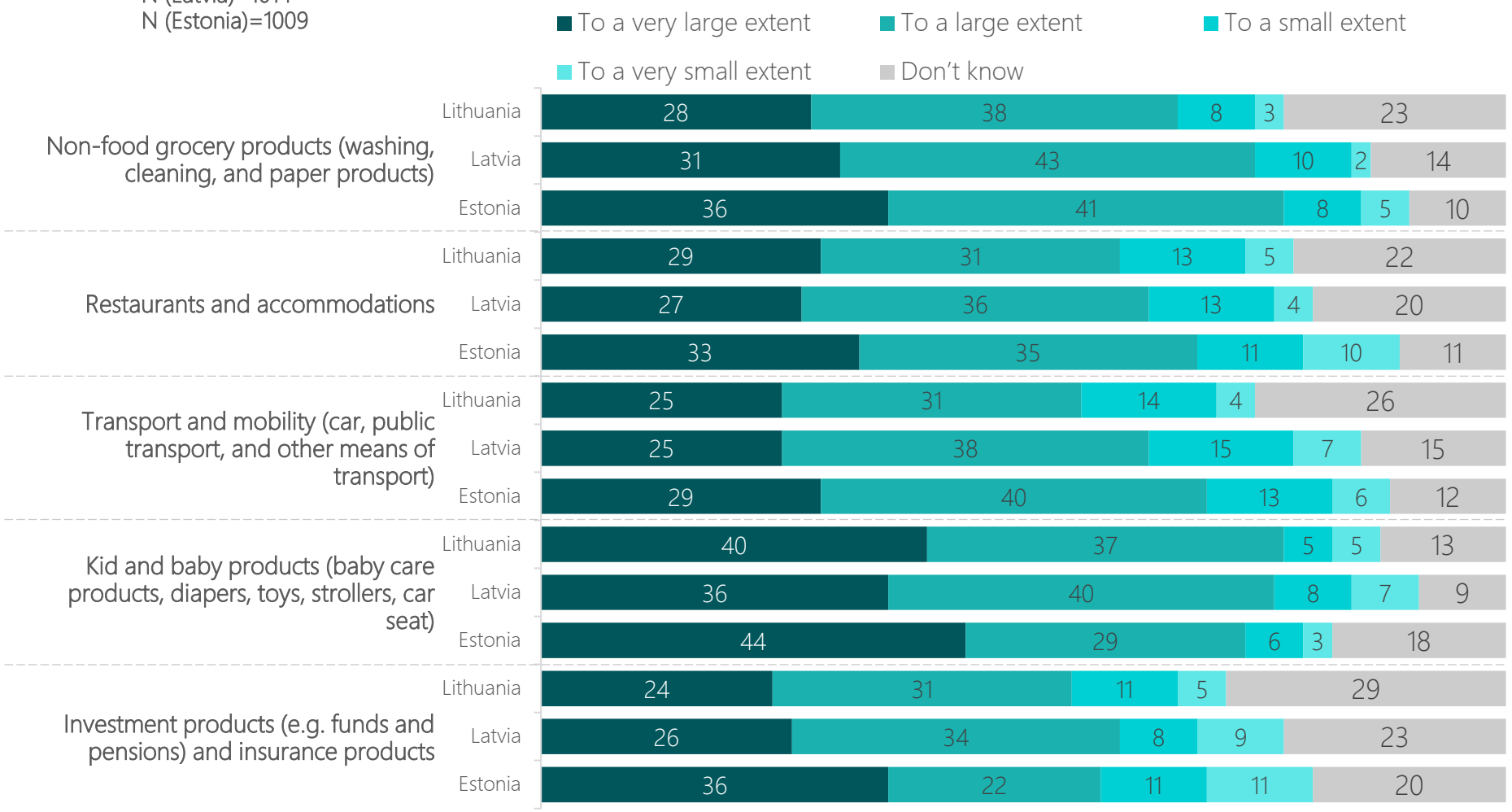
N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009



LIKELIHOOD OF CHOOSING A PRODUCT WITH THE NORDIC SWAN ECOLABEL (%) II/II

If the price and appearance were the same, how likely would you be to choose a product labelled with the Nordic Swan Ecolabel, if such a product were available, when buying the following products?

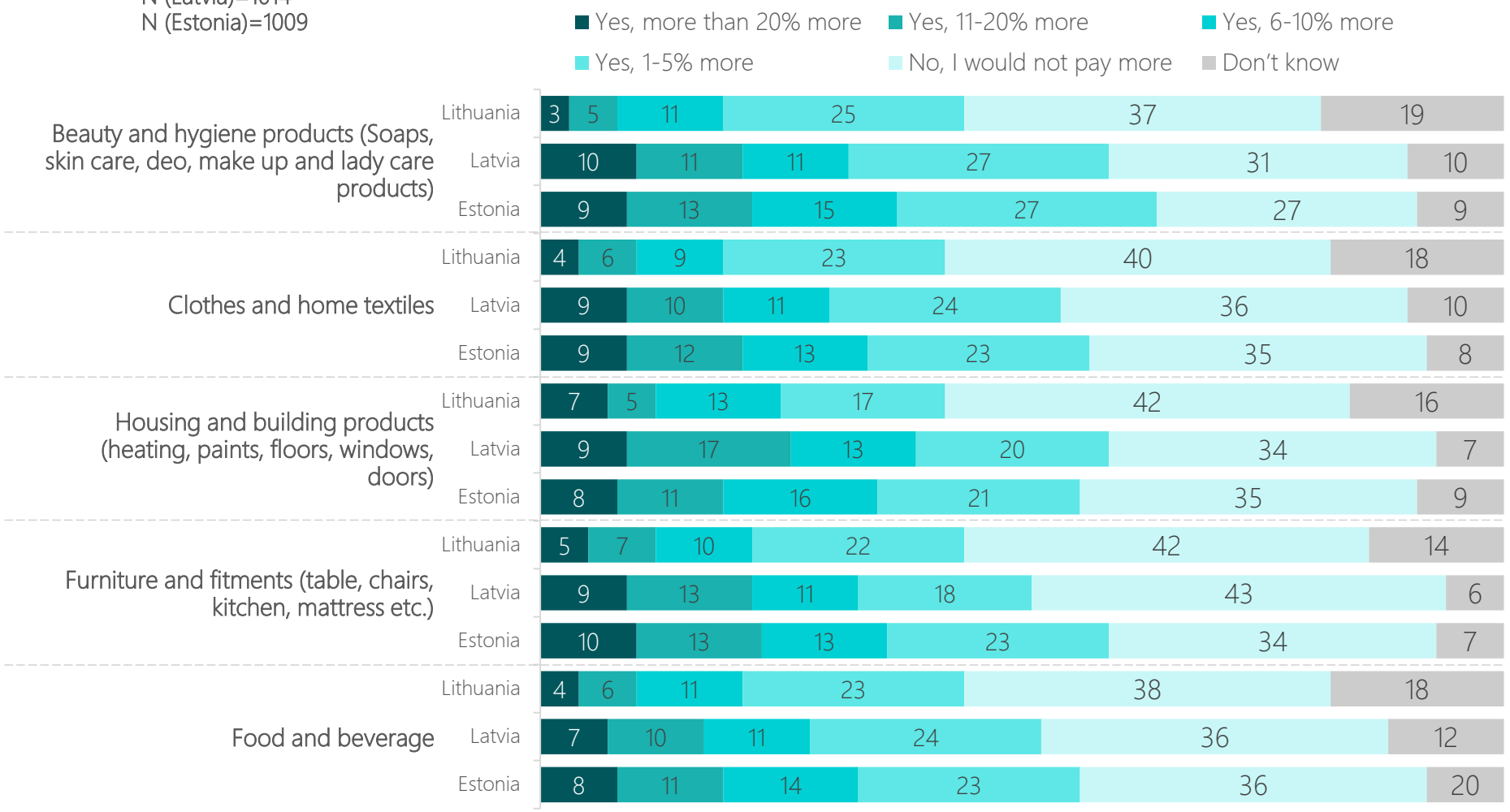
N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009



WILLINGNESS TO PAY MORE FOR PRODUCTS WITH THE NORDIC SWAN ECOLABEL (%) I/II

Are you willing to pay more for Nordic Swan Ecolabelled products within the following areas?

N (Lithuania)=1023
N (Latvia)=1014
N (Estonia)=1009



WILLINGNESS TO PAY MORE FOR PRODUCTS WITH THE NORDIC SWAN ECOLABEL (%) II/II

Are you willing to pay more for Nordic Swan Ecolabelled products within the following areas?

N (Lithuania)=1023
N (Latvia)=1014
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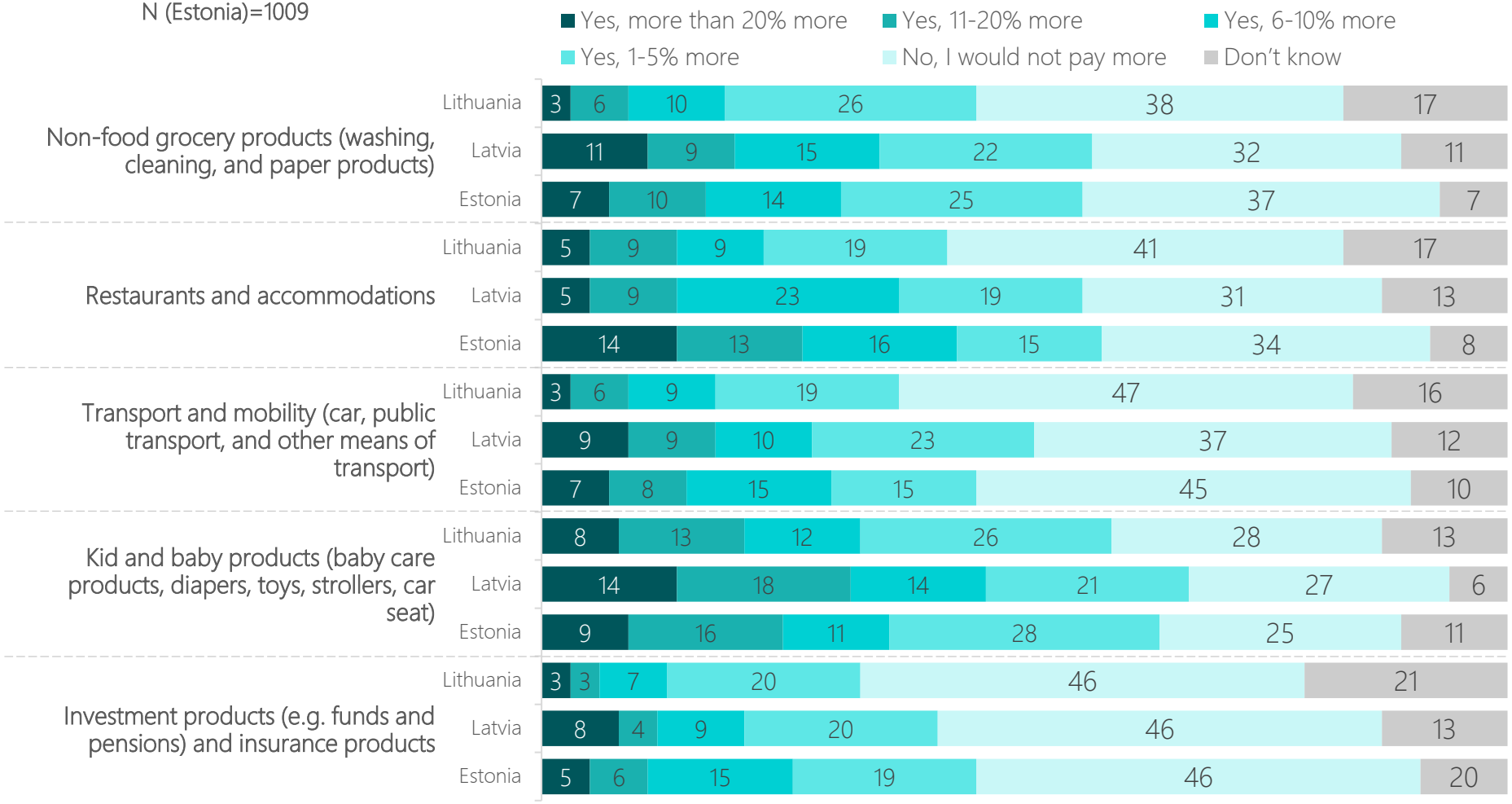

SUMMARY

Latvia

- When asked to spontaneously name known ecolabels, Latvian residents most often mentioned Karotite (21%). Only 1% of respondents spontaneously named the Nordic Swan Ecolabel.
- From the provided list of ecolabels, respondents most often indicate familiarity with the Karotite label (88%). Of these, 44% have seen the label and know what it means, 28% have seen it but have limited understanding of its meaning, and 16% recognize the label but do not know its meaning. The Nordic Swan Ecolabel is known by 37% of respondents – 8% have seen it and know its meaning, 10% have seen it but have limited understanding, and 19% recognize the label but do not know its meaning.
- Latvian residents believe that the biggest challenges currently facing the country are the economic situation (62%) and healthcare services (43%).
- Respondents identify the most important environmental problems currently faced as biodiversity loss (43%), plastic and microplastic waste (42%), climate change (40%), and air, soil, and water pollution (39%).
- Regarding the changes they observe in their municipality that are consequences of human-induced climate change, respondents most often mention changing duration and timing of seasons (39%), reduced snowfall (30%), increased rainfall (25%), and higher temperatures (23%).
- Regarding their personal impact on the environment, respondents most often agree that they care about what they can personally do to protect it (71% – 29% completely agree, 42% somewhat agree) and that they strive to minimize their lifestyle's environmental impact as much as possible (71% – 28% completely agree, 43% somewhat agree).
- Regarding the contribution of different groups to sustainability, respondents more often agree that they personally take sufficient measures to contribute to more environmentally friendly consumption and production (60% – 16% completely agree, 44% somewhat agree).
- Analyzing attitudes towards product labeling, respondents more often believe that companies frequently overemphasize the environmental friendliness of their products (71% – 34% completely agree, 37% somewhat agree), that they are annoyed when products are marketed as 'green' without additional justified explanations (68% – 34% completely agree, 34% somewhat agree), and that finding more environmentally friendly products requires extra effort (65% – 25% completely agree, 40% somewhat agree).

SUMMARY

- Respondents are more likely to trust that a product is environmentally friendly when it is certified by an independent third party with no connection to the product or its manufacturer (56% – 15% completely trust, 41% somewhat trust).
- Respondents trust the following eco-certification labels the most – Karotite (70% – 33% completely trust, 37% somewhat trust) and Latvijas Ekoprodukts (70% – 29% completely trust, 41% somewhat trust). The Nordic Swan label is trusted by 56% of respondents.
- When asked to indicate their level of agreement with statements about eco-labels, respondents most often agree that it is important for eco-labeling practices to be objective and independent from the products being certified (69% – 29% completely agree, 40% somewhat agree).
- Respondents identify the most relevant product categories as food and beverages (69%), beauty and hygiene products, clothing and home textiles (each 51%), and household care products (46%).
- Respondents consider it most important to choose environmentally friendly products in the food and beverage category (87% – 42% very important, 45% important).
- The categories in which respondents find it most difficult to find products that are a good choice from an environmental perspective are investment products (42% – 12% very difficult, 30% difficult), furniture and home interior details (39% – 6% very difficult, 33% difficult), and housing and building products (38% – 8% very difficult, 30% difficult).
- Respondents more often indicate that, given the same price and appearance, they would be more likely to choose products labeled with the Nordic Swan ecolabel in the categories of children's and baby products (76% – 36% very likely, 40% rather likely), housing and building products (75% – 31% very likely, 44% rather likely), and household care products (74% – 31% very likely, 43% rather likely).
- Respondents are more willing to pay a higher price for products labeled with the Nordic Swan ecolabel in the categories of beauty and hygiene products, as well as children's and baby products (64% each).

CONCLUSIONS

- The context of current issues in the Baltic and Nordic countries differs somewhat — in Latvia and Estonia there is greater concern about the economic situation, while in Lithuania this is less of a problem. In Lithuania, alongside economic challenges, healthcare services and defense are seen as the main issues. Compared to the Nordic countries, environmental protection and crime are less emphasized in the Baltic states.
- When discussing the main environmental issues, climate change is one of the most frequently mentioned. However, in the Baltic countries, plastic and microplastic waste as well as biodiversity loss are more often seen as problems. The most commonly observed consequences of human-induced climate change are changes in the duration and timing of the seasons.
- Regarding the awareness of ecological certification labels, local labels clearly dominate in Latvia and, to some extent, in Lithuania. In Estonia, where there are no local labels, international certification marks are better recognized and known. Among international labels, the EU Ecolabel holds the strongest position in the Baltic countries. The Nordic Swan label is somewhat better known in Estonia, whereas its recognition is considerably lower in the other Baltic states.
- The majority of residents in the Baltic countries, as well as in the Nordic countries, express concern and personal responsibility as consumers regarding their environmental impact. Although respondents from all countries agree that producers, governments, and consumers themselves do not do enough to promote environmental friendliness, the situation is viewed somewhat more positively in the Baltic countries compared to the Nordic countries.
- Regarding the recognition of environmentally friendly products and "greenwashing" practices, citizens of the Nordic countries are more often dissatisfied with the current situation than consumers on the other side of the Baltic Sea. Nordic residents place greater emphasis on the importance of independent certifications, while in the Baltic countries there is more trust in the communication from the producers themselves.
- When evaluating the importance of environmentally friendly products across different product groups, one category stands out in all countries – children's and baby products. Environmental friendliness is very important here. Other significant categories include food, beauty/hygiene, and home care products. Consumers find it most difficult to understand the environmental benefits in the category of investment products.
- Attitudes toward paying more for products labeled with the "Nordic Swan" ecolabel are strongest in Estonia and weakest in Lithuania.