

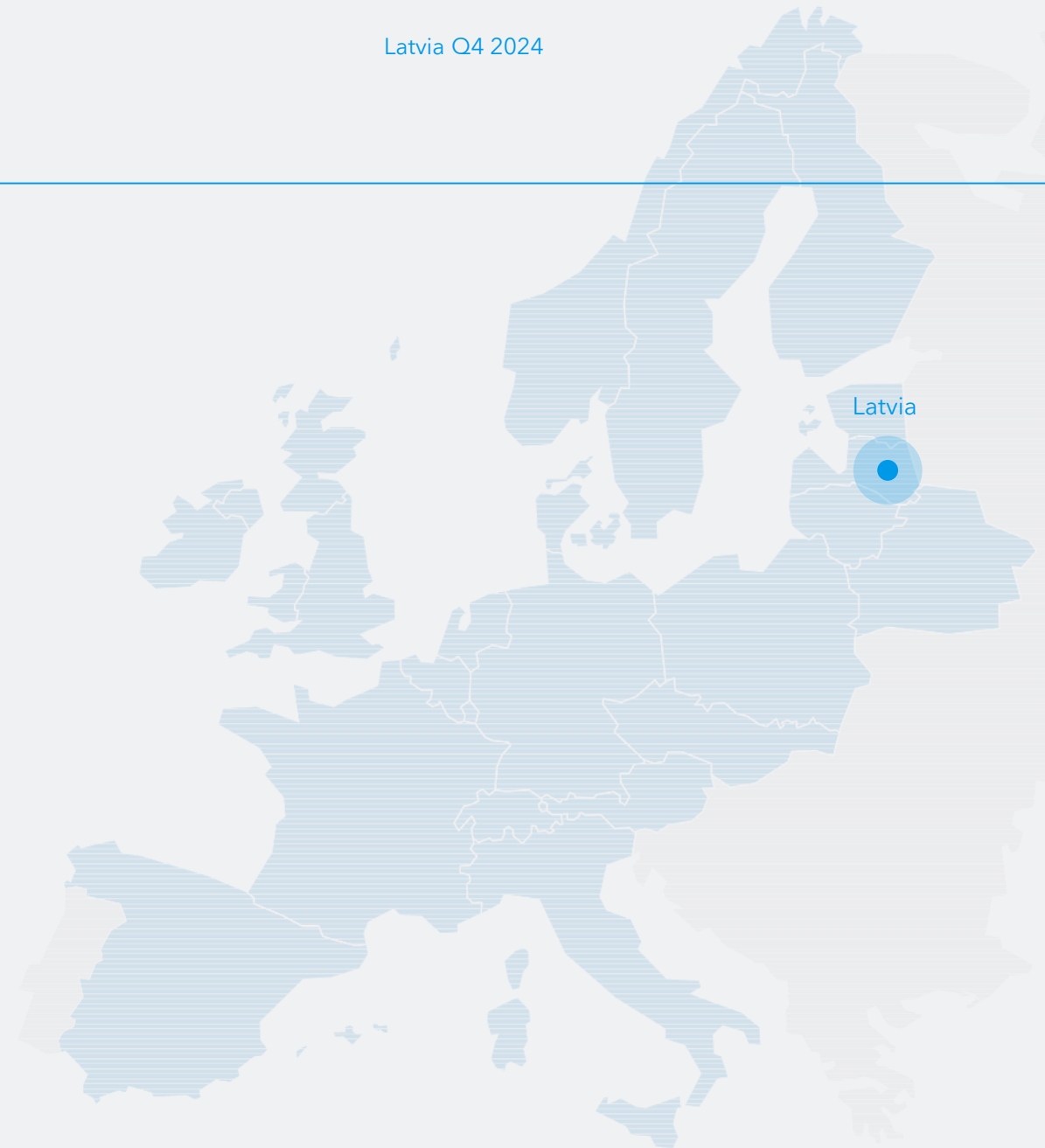
Know your people Latvia Q4 2024

Data to trust - for decisions that matter.



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About the report

Purpose



The purpose of the report and survey is to uncover the mood among the Latvian population. What aspects of society are they worried or concerned about? Where do they see themselves emotionally, and what are their expectations for their future behaviour and consumption?

The survey, which is conducted every quarter, provides knowledge about the aspects that may influence future consumption and can be used to support companies' strategic decisions and initiatives in relation to, for example, how the market position should be defended and strengthened, which communication should be used, which contact points should be focused on in marketing, etc.

Method



The survey was conducted by Norstat Latvia and is based on 503 interviews in Norstat's Latvian online panel.

Target group



Representative sample of the Latvian population, 18 years + (gender, age and region)

Length of interview



8 minutes

Number of interviews



503

Fieldwork period



Start: 2024.12.17
End: 2025.01.03

Society

Does the population trust the government and politicians? What social aspects concern and worry them? Which aspects can directly or indirectly have a decisive influence on future consumption?

62%

of the population are to a high extent/very high extent concerned about the development in Latvia.

57%

of the population thinks that things in general are headed in the wrong direction in Latvia.
8% think that things are going in the right direction, and 35% think that the situation is status quo.

Trust

Percentage of population having high/very high confidence in...

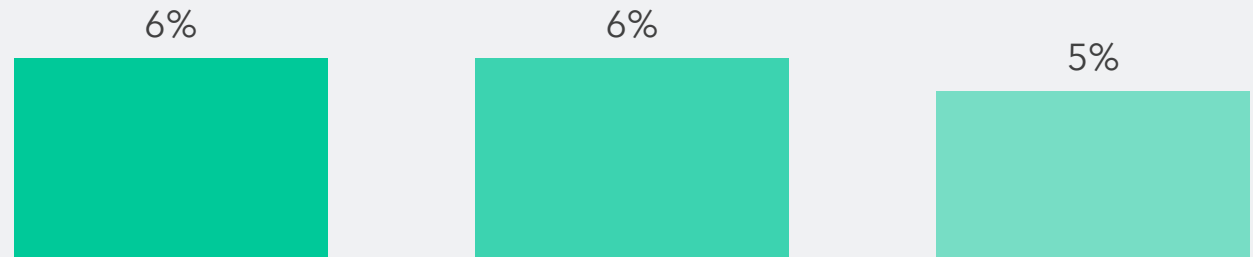
Base: 503 interviews

6% have high/very high confidence that the government will make the correct decisions in the current political climate.

6% have high/very high confidence in Latvian politicians in general.

5% of the population have more/much more trust in the government today compared to a year ago.

- I. ... that the government will make the correct decisions in the current political climate
- II. ... Latvian politicians in general
- III. ... the government today, as compared to a year ago





44%

of the population rate own/family's health as one of the societal areas they're most concerned about.

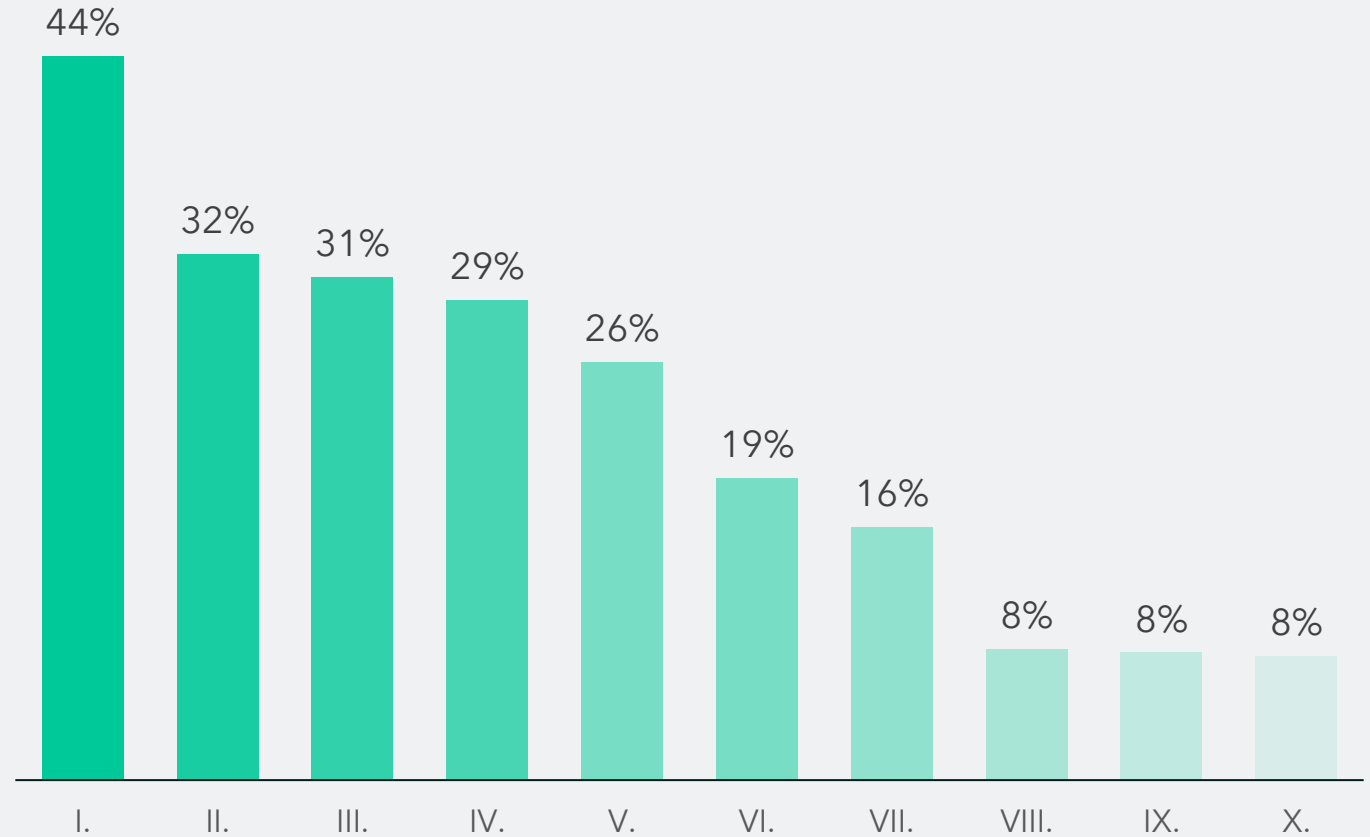
Societal Concerns

Top 10 societal concerns

Base: 503 interviews

Own/family's health, own/family's financial situation and health care are the three societal areas the population is most concerned about.

- I. My own/my family's health
- II. My own/my family's financial situation
- III. Health care (e.g., quality of the health care system, waiting times, patient rights, etc.)
- IV. Inflation (higher prices)
- V. International political conflicts
- VI. Increasing tax burdens
- VII. International political developments
- VIII. Health crisis
- IX. Labour market and employment issues
- X. Increased immigration



Is Latvia a safe place to live?

Latvia is considered by most of the population as a somewhat safe place to live. Only a few express that they would feel more secure if they lived in a country in Europe other than Latvia.

Around a third of the population feel to a high extent/very high extent that Latvia is a safe place to live.

31%

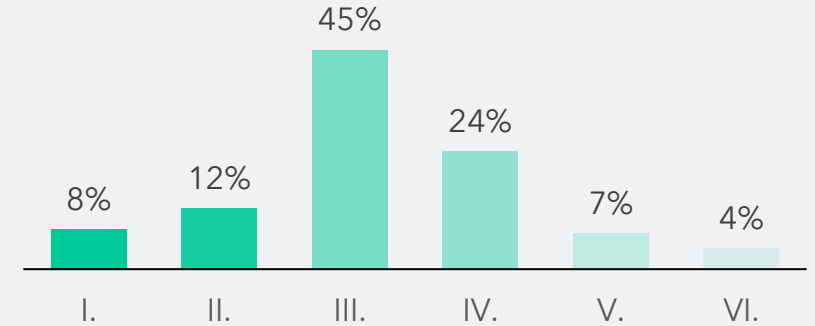
Less than a third of the population would not at all or only to a small extent feel safer living in another European country.

27%

Do you feel that Latvia is a safe place to live?

Base: 503 interviews

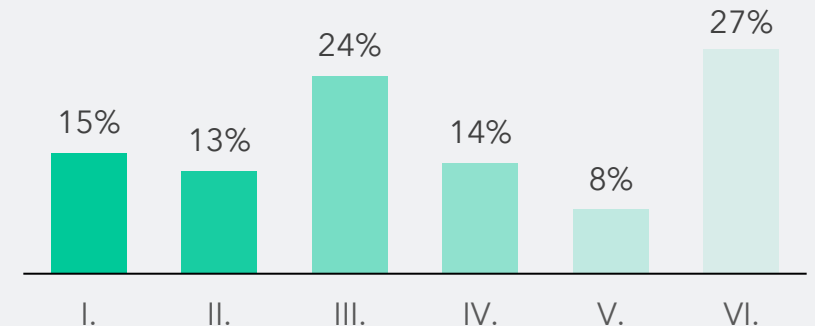
- I. Not at all
- II. To a small extent
- III. To some extent
- IV. To a high extent
- V. To a very high extent
- VI. Don't know



Would you feel safer if you were living in another country in Europe than Latvia?

Base: 503 interview

- I. Not at all
- II. To a small extent
- III. To some extent
- IV. To a high extent
- V. To a very high extent
- VI. Don't know





41 %

of the population have a positive or very positive view of the future.

33% have neither a positive nor negative view of the future.

Consumer

Consumer confidence and willingness to buy have changed more and faster in recent years. How does the population expect their consumption to be in the future?

27%

of the population have postponed or refrained from purchasing major consumer goods such as furniture, electronics, white goods, etc. within the past month.

15% have somewhat postponed or refrained from purchasing in this category in the past month.

29%

of the population expect to postpone or refrain from purchasing major consumer goods such as furniture, electronics, white goods, etc. in the next month.

13% expect to somewhat postpone or refrain from purchasing in this category within the next month.

8%

of the population have, to a large extent/very large extent within the last month, postponed or refrained from buying consumer goods such as food, household products, etc.

18% have somewhat postponed or refrained from purchasing in this category in the past month.

8%

of the population expect to a large/very large extent in the next month to postpone or refrain from buying consumer goods such as food, household products, etc.

14% expect to somewhat postpone or refrain from purchasing in this category within the next month.





13%

of the population have postponed or refrained from buying consumer goods such as clothes, shoes, personal care, home accessories, etc. within the past month.

19% have somewhat postponed or refrained from purchasing in this category in the past month.

15%

of the population expect to postpone or refrain from buying consumer goods such as clothes, shoes, personal care, home accessories, etc. in the next month.

20% expect to somewhat postpone or refrain from purchasing in this category within the next month.

49%

of the population do not shop for groceries online. Online purchasing of other goods and products is more widespread among the population than groceries. 12% do not purchase other goods and products online.

The battle for consumers has never been more intense. Consumers have become more aware of their consumption and preferences, and purchase decisions are based to a greater extent on parameters other than price, quality and branding.

Price in relation to quality is important to many, but the final decision is based to a greater extent on other aspects such as purpose, sustainability, environment, etc.

39% of the population prefer products and brands of average pricing.

52% of the population generally prefer brands and products that are cheaper than average.



Attitude to online shopping

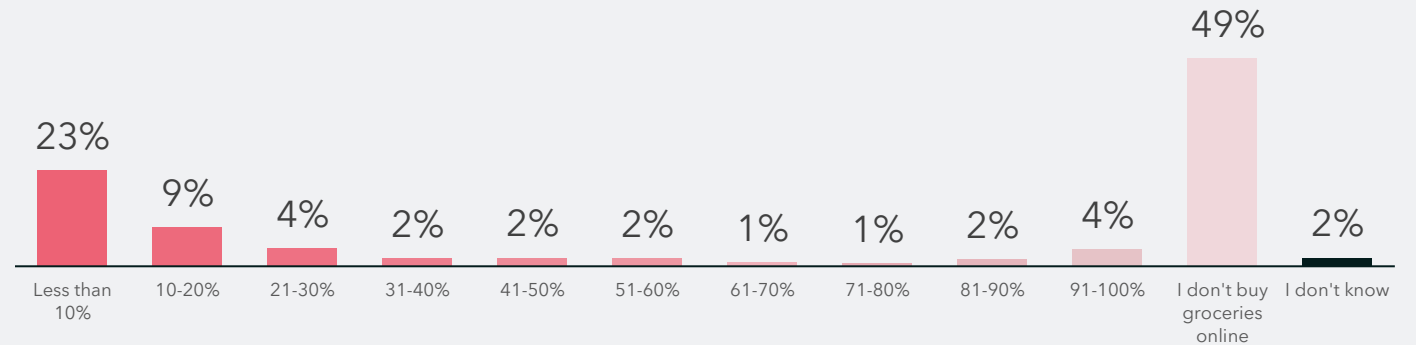
49% of the population do not shop for groceries online, and 23% do less than 10% of their grocery shopping online. 12% do not buy other goods online, and 21% make less than 10% of their purchases of other goods online.

Online shopping for other goods and products is far more common among the population than online shopping for groceries.

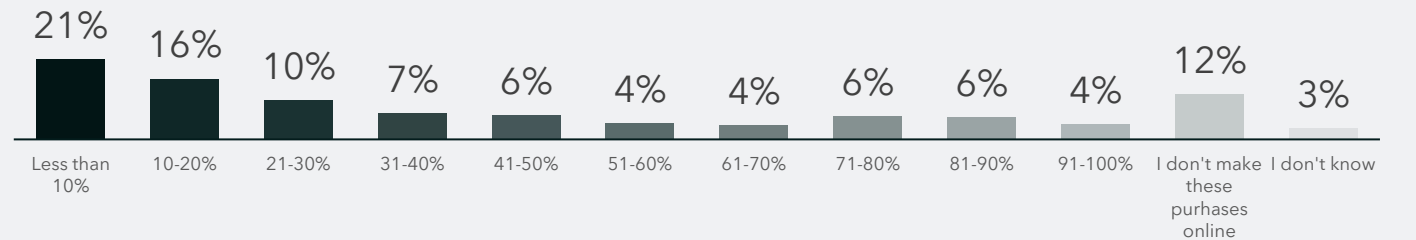
Share of population who make grocery purchases and other purchases online.

Base: 503 interviews

■ Groceries



■ Other goods



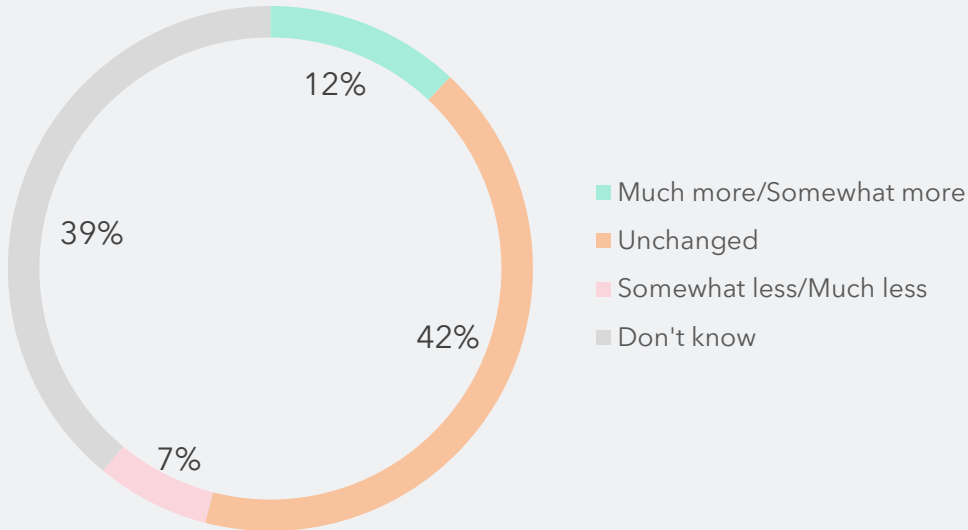
Expectations for future online commerce

12% of the population expect to make more grocery purchases online in the future and 7% expect to make fewer. 11% expect to make more online purchases of other goods in the future, and 6% expect to make fewer.

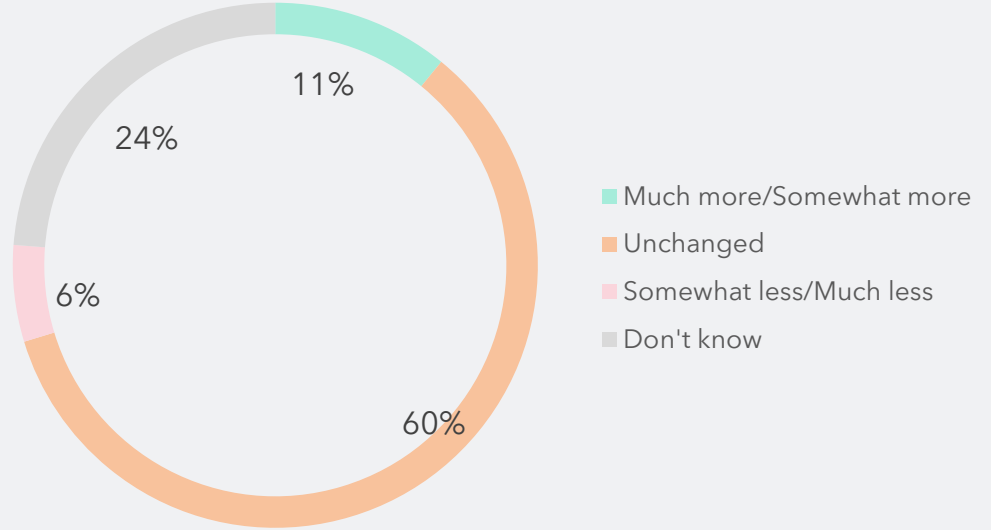
Base: 503 interviews

Expectations for their future grocery purchases and other purchases online in percentages.

Groceries



Other goods





23% of the population expect to save less/much less in the coming three months. 22% expect to save more/much more, and 42% expect it to be the same as today.

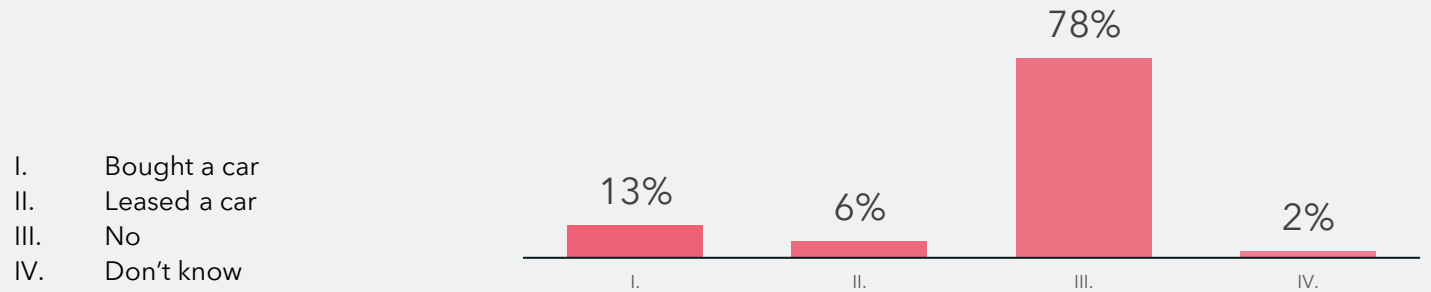
8% expect a higher/much higher consumption in the coming three months. 43% expect that their consumption in the next three months will be unchanged, and 35% expect it to be less than today.

Car purchase & leasing

13% of the population have bought a car in the past year, and 6% have leased a car. The diesel-fueled car is the type of car most have bought in the past 12 months. Whereas, more have leased a petrol-fueled car.

In the last 12 months, have you or anyone in your household bought or leased a car?

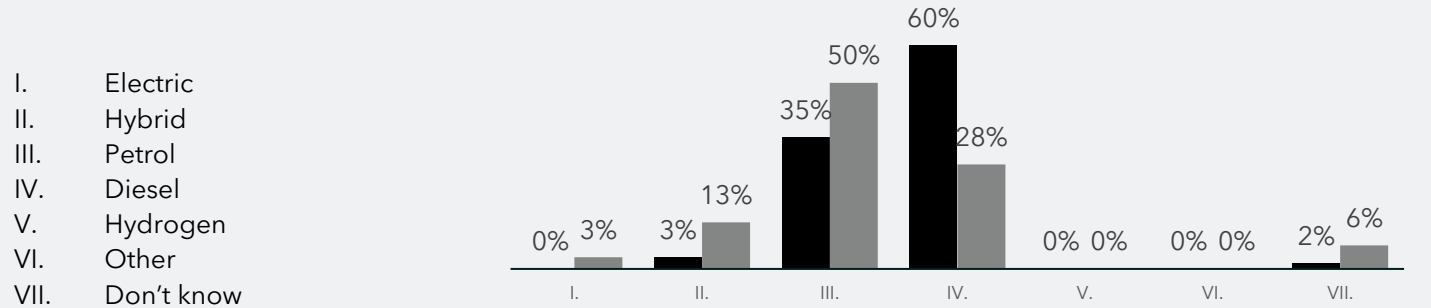
Base: 503 interviews



Which type of car did you/your household buy/lease?

Base: 65 interviews (bought), 32 (leased) interviews

■ Bought ■ Leased

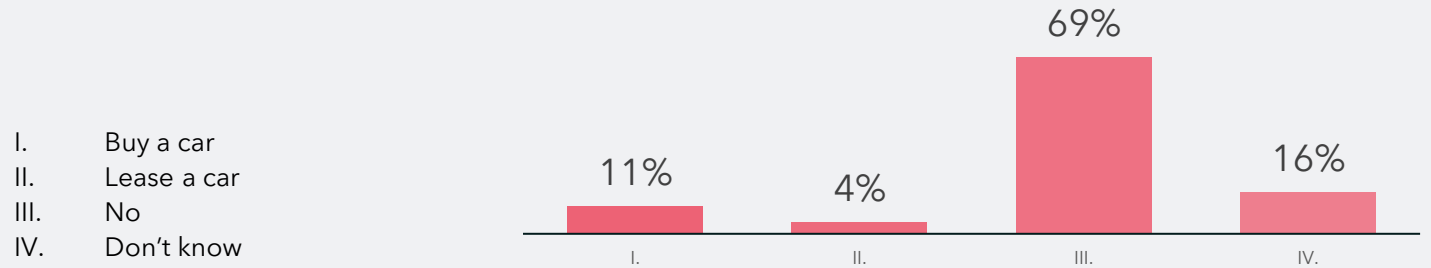


Plans for buying/leasing a car

11% of the population plan to buy a car within the next year, and 4% plan to lease a car. More people are considering buying a diesel-fueled car while more are considering leasing a petrol-fueled or a diesel-fueled car.

In the next 12 months, are you or anyone in your household planning to buy or to lease a car?

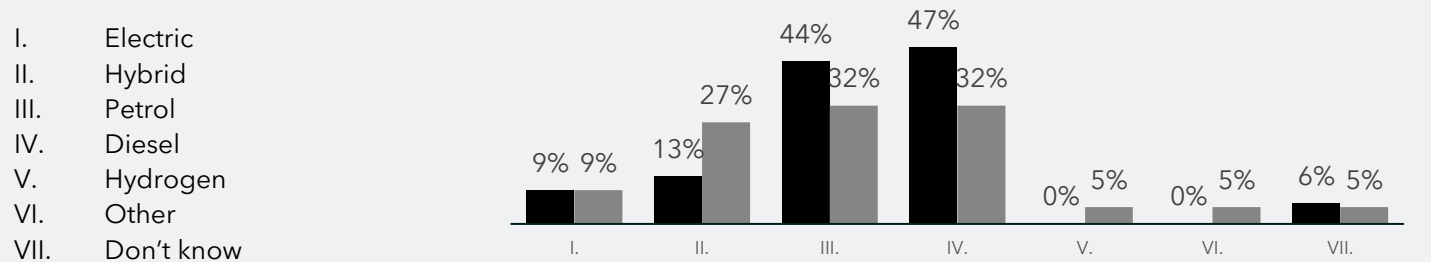
Base: 503 interviews



Which type of car are you/your household consider buying/leasing?

Base: 55 interviews (buy), 22 (lease) interviews

■ Buy ■ Lease



Health & Wellbeing

How does the population assess their quality of life and happiness? To what extent do stress and loneliness impact their life? What aspects can influence societal concerns and trust in the political arena and thus influence consumer confidence and consumption?

68%

of the population feel - to a very high degree, high degree or to some extent - happy. 30% do not feel or only, to a small extent, feel happy.

45%

of the population rate their quality of life as good or really good. 11% assess that their quality of life is poor or very poor.

The pillars of life in Latvia

As a person's values play a large role in which products and services they consume, an understanding of a societal value system can be hugely beneficial to companies.

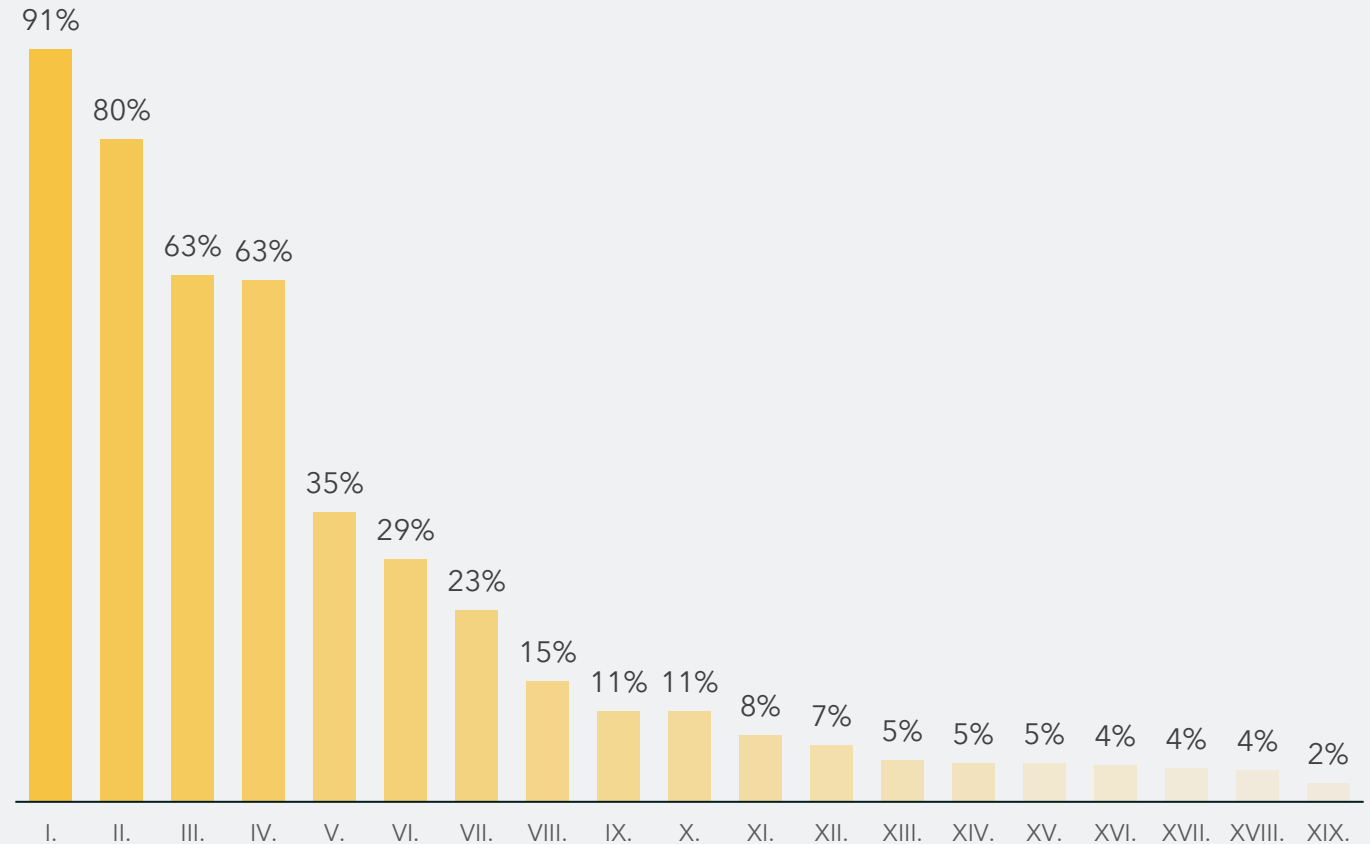
This understanding of values can inform product design as well as improve communication between companies and their consumers.

Here, we have taken the pulse of the nation to understand what values are the most important to them.

- | | |
|----------------------|------------------------|
| I. Health | XI. Success |
| II. Family | XII. Intimacy |
| III. Wellness | XIII. Reason/rationale |
| IV. Safety | XIV. Compassion |
| V. Humanity | XV. Social relations |
| VI. Personal freedom | XVI. Recognition |
| VII. Nature | XVII. Responsibility |
| VIII. Balance | XVIII. Mindfulness |
| IX. Security | XIX. Community |
| X. Simplicity | |

Which of the following aspects are the most important to you in the way you live your life?

Base: 503 interviews



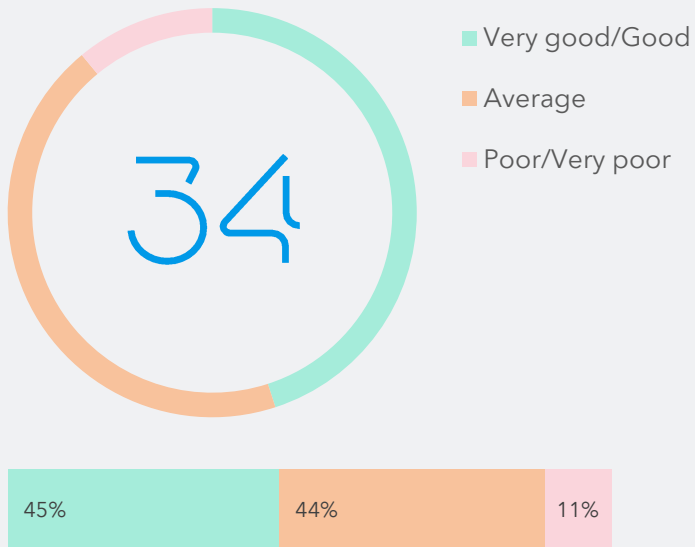
Quality of life

More assess that their general quality of life is good or very good compared to poor or very poor. The same applies to their assessment of their own state of health. Only 28% of the population also assess that they, to a very high extent or high extent, are happy. 68% of the population estimate that they are at least to some extent happy.

Base: 503 interviews

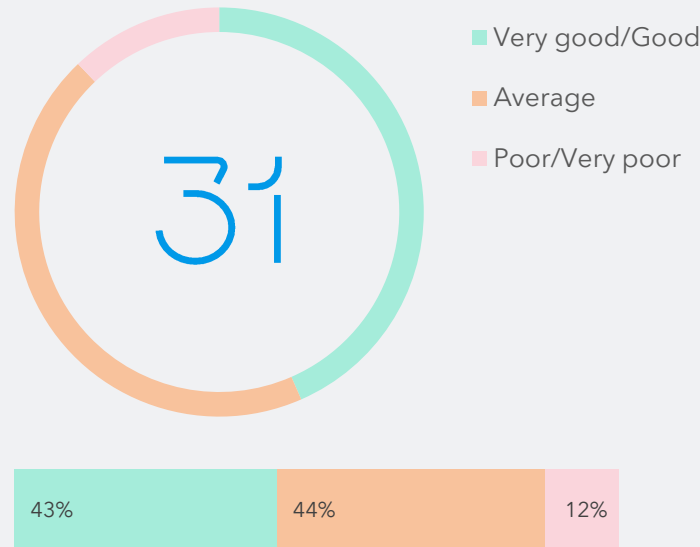
Quality of life

A score of 34 indicates that more people rate their quality of life as good and not bad.



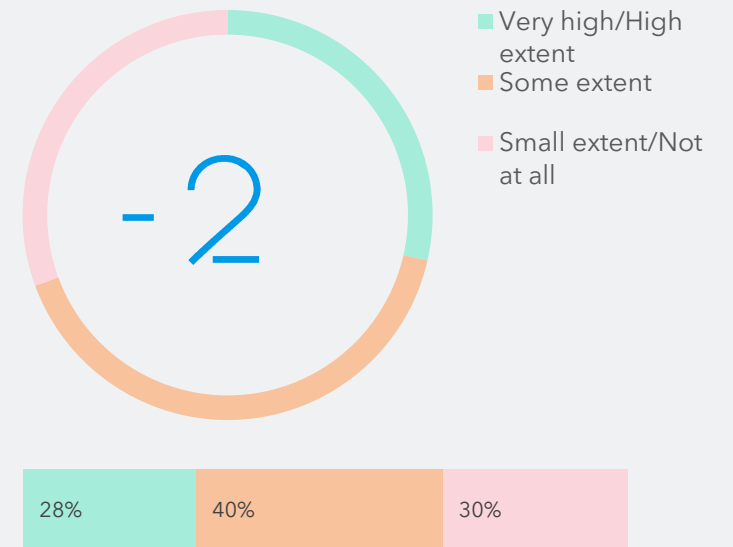
Health

A score of 31 indicates that more people rate their state of health as good and not bad.



Happiness

A score of -2 indicates that more people feel unhappy than happy.



Quality of life

More feel unappreciated, yet also more feel that their family situation and financial situation, are good or really good.

Base: 503 interviews

Valued

A score of -12 indicates that more people feel unappreciated than appreciated.



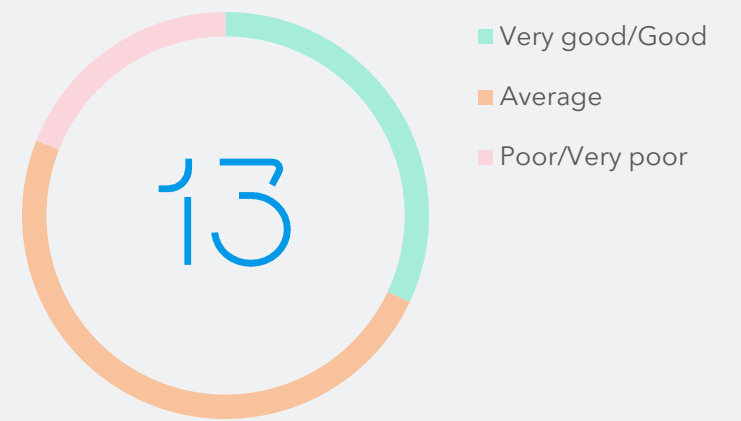
Family situation

A score of 59 indicates that more people feel that their family situation is good.



Financial situation

A score of 13 indicates that more people feel that their financial situation is good.



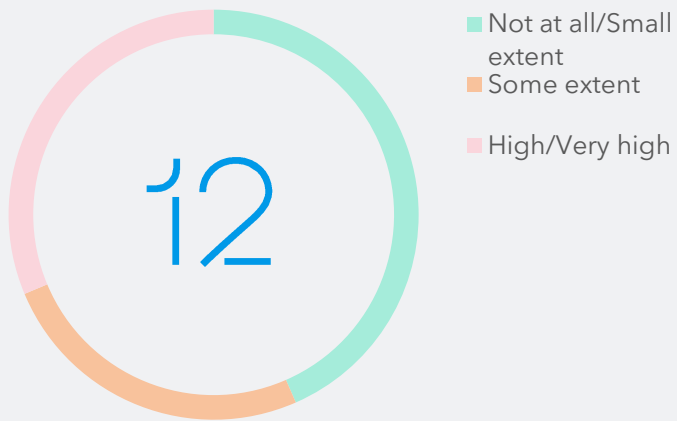
Quality of life

More do not feel stressed. Furthermore, more do not feel lonely or frustrated.

Base: 503 interviews

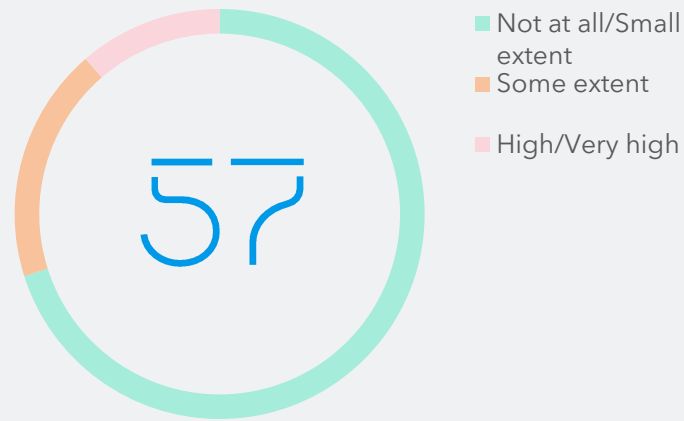
Stress

A score of 12 indicates that more do not feel stressed than stressed.



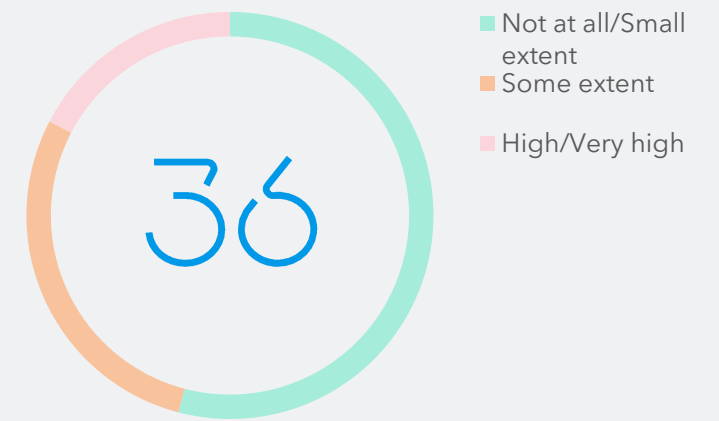
Loneliness

A score of 57 indicates that more do not feel lonely than lonely.



Frustration

A score of 36 indicates that more people do not feel frustration.





43%

are neither satisfied nor dissatisfied with their workplace. 32% are dissatisfied, and 20% are very satisfied.

40% find it unlikely that they would recommend their workplace as a good place to work and 20% find it likely.

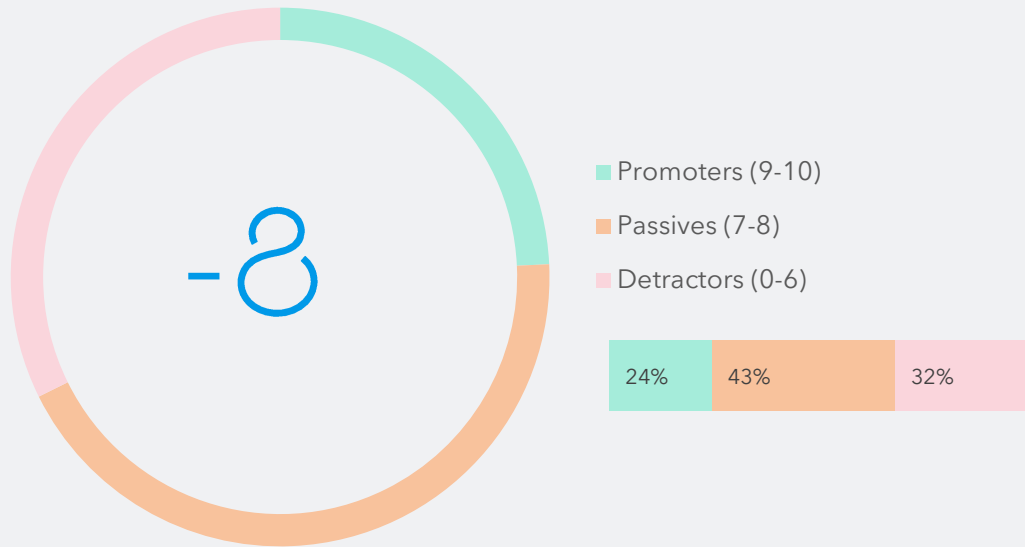
Worklife

From an eSAT perspective, more within the workforce are dissatisfied with their workplace. From an eNPS perspective, there are also more who find it unlikely that they would recommend their workplace to others as a good place to work. The questions about satisfaction with the workplace and the likelihood of recommending are based on a 0-10 point scale. The eSAT and eNPS scores are calculated by subtracting the proportion of Detractors (answers 0-6) from the proportion of Promoters (answers 9-10).

Base: 333 interviews

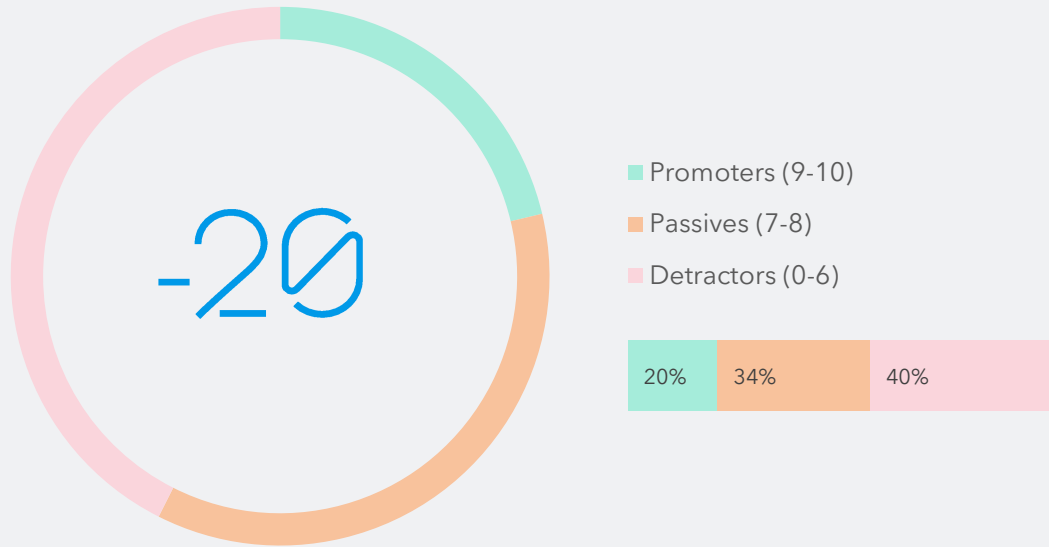
eSAT - Overall, how satisfied are you in the workplace?

A score of -8 indicates that there are more who are dissatisfied than satisfied with their workplace.



eNPS - How likely are you to recommend your workplace to others?

A score of -20 indicates that more people find it unlikely that they would recommend their workplace to others.





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