



# Understanding the Canadian LOHAS Consumer

April, 2010

# Table of Contents

Page #		Page #	
2	Table of Contents	21	Sustainability Behaviours Move from 'Concern about Me' to 'Concern about All'
4	Introduction	22	The LOHAS Concept Merges Personal and Planetary Health
5	NMI's Canadian LOHAS Segmentation	23	LOHAS Consumers Are Early Adopters of Eco-Friendly Products
6	NMI's LOHAS Consumer Trends Database™ Summary Overview	24	All Segments are Important BUT LOHAS Consumers Drive Trends & Influence the Mainstream
7	Segmentation Methodology	25	Sustainability Actions are a Commitment
8	The NMI LOHAS Segments in Canada	26	Summary of Key Findings
9	Regional Segmentation Differences	27	Canadian vs. American Differences
10	LOHAS Segmentation Differences: Canada and the US	28	Buying Behaviour and Impact on Shopper Programs
11	Meet Laurel, a LOHAS Consumer	29	Packaging Issues
12	The LOHAS Consumer – Demographic Profile	30	CSR Issues
13	Meet Nancy, A NATURALITE	31	Key US vs. Canadian Differences
14	The NATURALITE Consumer – Demographic Profile	32	More Canadians Concerned About Environmental/Health concerns Than Americans
15	Meet Dave, a DRIFTER	33	Canadians More Concerned About Certain Social/Economic Issues vs. Americans
16	The DRIFTER Consumer – Demographic Profile	34	Sustainability is a Global Trend – Behaviour Changes Will Vary by Culture With Convergence Over Time
17	Meet Frank, a CONVENTIONAL	35	Paying Premium for Sustainability is Tempered by Broad-Based Concerns About Price
18	The CONVENTIONAL Consumer – Demographic Profile	36	Many Canadians Are Staunch Recyclers; US Lags
19	Meet Ernie, an UNCONCERNED	37	Canadians Most Likely to Be Amenable to Paying a Premium for Green
20	The UNCONCERNED Consumer – Demographic Profile	38	Buying Behaviour

# Table of Contents (continued)

Page #		Page #	
39	LOHAS And NATURALITES More Likely to Claim to Buy Green	54	Majority Concerned About Excess Packaging Filling Landfills, Especially LOHAS
40	Consumers Eager for More Environmentally-Friendly Choices...	55	Consumers Have Strong Opinions About Over-Packaging, But Are Less Motivated To Act
41	...But Are Concerned About Price and Sacrificing Quality	56	Consumers Want to Know What Companies Are Doing to Use Less Packaging
42	LOHAS Consumers Claim to Be Willing To Invest More In Environmentally Friendly And Sustainable Products	57	Packaging Drivers Most Important to LOHAS Segment for Food and Beverage Purchases
43	Barriers to Buying Green	58	Majority of Consumers Care About Using Products Made From Recycled Materials...Key Packaging Implications
44	Current Usage/Ownership of Green Categories	59	CSR Efforts
45	Environmentally-Friendly Lawn & Garden Product Users More Likely LOHAS Than GP	60	CSR Important to A Majority of Consumers...Higher in Canada
46	Strong Canadian Interest in Environmentally-Friendly Versions of Consumer Packaged Goods	61	...And Caring About CSR Translates to Purchases
47	Top Drivers for Food/Beverage Purchases	62	CSR is Relevant & Motivating to Most Consumers
48	Seals, Certifications Have Impact Among Certain Consumers	63	Few Consumers Aware of CSR Branding Efforts – Opportunities for Increased Communication
49	Recognition, Understanding, Impact of Seals & Certifications Varies...Opportunity for Education	64	Most Want Someone Else to Endorse CSR; Primarily a Non-Profit
50	Recession May Be Accelerating Sustainable Behaviors	65	Specific CSR Activities Consumers Want to See From Companies
51	Channels Shopped	66	News Stories Are Most Preferred Source of Information About CSR Efforts
52	Packaging Issues	67	Top Information Sources More Preferred By LOHAS vs. Other Segments
53	Awareness of Terms Related to Packaging	68	Corporate Sustainability Efforts Most Impact LOHAS And Least Impact UNCONCERNEDS

# Summary & Pricing

---

- Canada, a nation of 34 million people, is often seen as the US's quiet neighbor to the north, and one that falls between the US and Europe on the ideological sustainability spectrum. Too often, consumer research in Canada relies on applying some basic assumptions to US research, leaving the researcher with, at best, a fuzzy marketplace snapshot.
- Fortunately, with this report, that is no longer the case for the LOHAS market. In 2009, NMI conducted the first thorough primary analysis of the LOHAS (Lifestyles Of Health And Sustainability) consumer marketplace in Canada.
- NMI's research confirms that, in many ways, Canada *does* have a greener population than the US, but that this is not universally the case. Canadians are clearly concerned practitioners of many environmental and socially-conscious habits. But, they also have a fervent practical streak that precludes some deeper green behavior and identifies areas where barriers need to be broken down, such as price, green product proof points and benefits, and skepticism of corporate claims.
- It is also clear that Canada should not be treated monolithically – significant differences are evident between geographic regions, making some much more opportunistic for LOHAS marketers to pursue.
- This report is a comprehensive analysis of sustainability-related consumer opinion in Canada, behaviors, their application to the LOHAS product marketplace, and other key metrics for understanding how to market LOHAS products and services in Canada. As applicable, these results are compared to US, European, and Japanese data to give the reader a sense of how Canada fits in the international LOHAS market.
- This research project also relies on NMI's international LOHAS segmentation model, which is described in the next section. This same model has been used in every country where NMI conducts LOHAS research in order to facilitate comparisons between countries.
- We hope that you find this report actionable and insightful. For information on even more LOHAS research, including how to make it specific to your brand, company, or marketing initiatives, please contact NMI.

**Pricing: \$2,500** for single division site license (PowerPoint & PDF and site rights allowing you to post files on internal computer network at one company division/location only). **\$5,000** for multiple division site license.

# Natural Marketing Institute

## 272 Ruth Road

## Harleysville, PA 19438

To order, contact your NMI account manager or  
Nancy White  
215.513.7300, ext. 225  
[nancy.white@NMIsolutions.com](mailto:nancy.white@NMIsolutions.com)

[www.NMIsolutions.com](http://www.NMIsolutions.com)