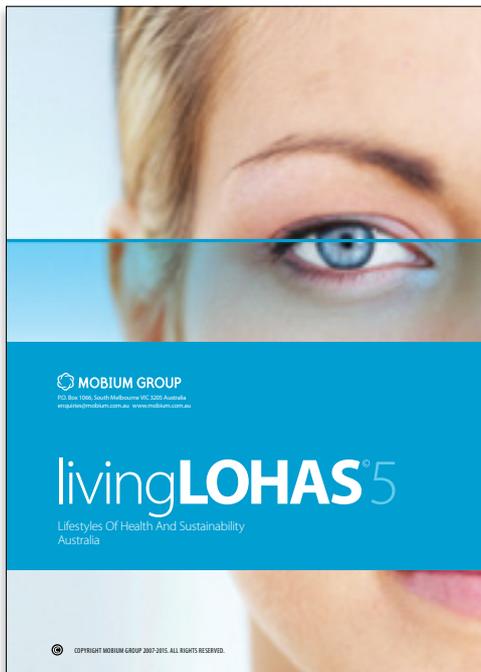


livingLOHAS⁵

Lifestyles Of Health And Sustainability
Australia

Research Project Summary



How fast is the market for healthier, more sustainable products and services growing?

How are Australians' attitudes, concerns and values changing?

What are the barriers to further growth?

Are there opportunities for new entrants to disrupt traditional markets?

The **Living LOHAS⁵** report answers these questions and provides a reliable fact base for informed decision making about the issues and opportunities presented by the consumer market for healthier, more sustainable products and services.

What is the Living LOHAS[®] Research Project?

Living LOHAS[®] is a comprehensive research program that provides an up to date fact base on consumer and social trends in Australia relating to sustainability, natural health and wellness.

The project is funded, researched and written exclusively by Mobium Group's team of researchers, led by Nick Bez and Andy Baker.

Living LOHAS^{®5} is the fifth in the Living LOHAS series, published by Mobium Group since 2007. Over this period, Mobium Group has surveyed over 40,000 Australians on 250+ measures related to values, attitudes, behaviours and consumption patterns, and undertaken over 850 in-depth discussions with individuals in their homes, workplaces, leisure and educational environments.

The **Living LOHAS^{®5}** report provides a detailed review and analysis of the Australian consumer market for healthier, more sustainable products and services from 2007 through until 2015.

Issues covered include:

- ▶ Major environmental concerns
- ▶ Values and attitudes towards sustainability issues and actions at a personal, community, business and government level
- ▶ Market composition, size and growth
- ▶ Consumer segmentation and participation rates
- ▶ Roadblocks to further uptake and key barriers
- ▶ Understanding and awareness of eco-labels and certification marks

The insights generated provide an unparalleled depth of understanding about the motivations of Australians to engage in healthier, more sustainable lifestyle choices.

Project Methodology

The Living LOHAS^{®5} study used a composite approach to data collection comprising three distinct components;

Quantitative Study: A national quantitative survey was executed to collect an extensive inventory of the values, attitudes, and actions of adult Australians.

- ▶ Sample size: 2,022
- ▶ Coverage: all states – metropolitan/regional
- ▶ Screen: aged 18 – 69
- ▶ Question set: ~150 measures
- ▶ Data collection: multi-wave data collection process; late 2014 and throughout 2015

Mobium Group is a member of the Australian Market and Social Research Society and is bound by a Code of Professional Behaviour in relation to the standard conditions of conducting and reporting marketing research.

Rounding of the data set has been undertaken in the analysis. Readers should note this may cause a variation of +/- 1% in individual responses.

Qualitative Dialogue: Over 100 face to face discussions with Australian consumers in individual and group settings.

Market Sizing: Derived from a combination of sources including industry associations and trade journals, market data and published reports and discussions with industry, government and NGO professionals.

Mobium's Living LOHAS report is considered the benchmark in Australia on consumer attitudes and purchasing trends in the green sector.

Sydney Morning Herald

Living LOHAS[®]5 Topic Areas

1. Executive Summary
2. What is LOHAS?
3. How big is the opportunity?
4. Who is driving the growth and why?
5. What matters most?
6. What are the characteristics of a 'Responsible Organisation'?
7. What's holding the market back?
8. What does the future hold?

Living LOHAS[®]5 Details

Publisher: Mobium Group Pty Ltd

Pages: 68

Content: Data, insight and analysis

Format: Digital – Secure .pdf
(Adobe Acrobat[®] required)

Audience: Corporations, Business,
Government, Non Government Organisations

Licensing: Variety of options available
depending on intended use

Purchase: Contact Mobium Group –
enquiries@mobium.com.au

Key Issues Examined

What are Australians saying and doing when it comes to the community and environment? How has this sentiment and activity changed in the past 8 years?

- ▶ What are the key trends in consumer concerns about the environment and has this affected their purchasing behaviour?
- ▶ How big is the market, which categories are best performed and which consumer segments are driving this outcome?
- ▶ What are characteristics of organisations that have successfully addressed the LOHAS market?
- ▶ Which are now the key roadblocks to increased uptake of LOHAS options?
- ▶ Are 'no compromise' propositions still the foundation of the next wave of LOHAS products?
- ▶ How do individuals view the performance of business and what are their expectations?
- ▶ Where do shoppers go for information on healthier, more sustainable product and services?
- ▶ What do consumers know about product environmental standards and eco-labels?
- ▶ How do Australian's see the future? Is the LOHAS market at the cross-roads or poised for further sustained growth?

There are few dedicated, independent consumer insights reports into the attitudes of Australian consumers when it comes to the environment and sustainability. Mobium's Living LOHAS (Lifestyles of Health and Sustainability) is currently regarded as the gold standard in many circles.

B&T Magazine

Sample Report Content

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This growth is spread across a wide range of consumer product and service categories. Many LOHAS products have outperformed their conventional competition over the study period.

The LOHAS market has grown from \$12Bn in 2007, to \$26Bn in 2015, representing a doubling over that time. This growth is spread across a wide range of consumer product and service categories. Many LOHAS products have outperformed their conventional competition over the study period.

This growth marks an even more rapid underlying growth in volume across several categories, as shown here later over time. For example, the solar market has continued to see high levels of uptake, however, overall dollar value is declining as the cost per kWh of panels has decreased. Similar trends have been witnessed in organic food, as market expansion, driven by supermarket private label organic offers, provides a low cost, high volume category entry point.

The size of the LOHAS market should not come as a surprise. What were once niche activities have now become mainstream. For example in 2015/16 the Australian Bureau of Statistics (ABS) stated that more than 300,000 Australians participated in yoga in that year, more than the number reported to participate in Australian Rules Football, Rugby League, or surf-based sports. Pilates also saw high levels of activity with over 200,000 participants.

Insights from global markets also support the LOHAS growth story. Analysis conducted by Boston Consulting Group in 2014 showed that products and services with LOHAS attributes are capturing market share and are key drivers of profitable growth in consumer goods categories in North America.

Estimated and projected growth of LOHAS market 2007 - 2017

Year	Estimated Value (\$ Billion)
2007	12
2008	15
2009	19
2010	22
2014	26
2017	30

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Segments have different needs...

The distinctions between the LOHAS segments can be summarised based on the following factors that reflect both values and actions.

- ▶ Advocacy
- ▶ Segment participation
- ▶ Commitment
- ▶ Values alignment
- ▶ Future interest
- ▶ Current barriers

Segment characteristics

The distinctions between the LOHAS segments can be summarised based on the following factors that reflect both values and actions.

Advocacy: The extent to which individuals openly discuss the benefits of LOHAS products or services with family, friends and colleagues.

Segment Participation: The current rate of usage of LOHAS products and services across a wide range of categories.

Commitment: The frequency and duration of participation in LOHAS products and service categories.

Values alignment: The extent to which personal values and concerns take into account both individual and societal concerns in relation to health and sustainability issues.

Future Interest: The indicated levels of intention to participate in various aspects of healthy and sustainable lifestyles in the future.

Current Barriers: Key roadblocks to further uptake of products and services within the LOHAS categories.

LOHAS Segment Characteristics

Segment	Advocacy	Segment Participation	Commitment	Values Alignment	Future Interest
Advocates	High	Medium	High	High	High
Participants	Medium	High	Medium	Medium	Medium
Committed	Low	Low	High	High	High
Interested	Low	Low	Low	Low	High

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Prompted awareness of eco-labels, social trust marks and environmental logos is growing...

The majority of shoppers support stores stocking products that use eco-labels. There is an implicit expectation of retailers to stock products with eco-labels if they are choosing to sell products that make environmental claims.

Prompted awareness of eco-labels, social trust marks and environmental logos

There are now dozens of eco-labels, social trust marks and environmental organisation logos that are used on packaging and in consumer communication.

Mobium Group tracks awareness of the following:

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