ORCI

Ontario Responsible Consumption Index

ONTARIO RESPONSIBLE CONSUMPTION INDEX 2012

A study conducted with
the support of TD Bank Group

OCR Responsible Consumption Observatory

The Responsible Consumption Observatory (RCO) in brief

RCO is an inter-university research group (ESG-UQÀM / University of Sherbrooke) comprising 13 researchers from Québec (UQÀM, UdeS), France (Bretagne-Sud University, Lyon 2 University) and the Netherlands (Gröningen University). Researchers draw on extensive expertise which they apply to the field of responsible consumption. The RCO is directed by Professor Fabien Durif of UQÀM's School of Management Sciences.

The RCO's mission is to contribute to the development of scientific and practical analysis of the phenomenon of responsible consumption by providing university and institutional researchers, field specialists, citizens, NPOs and the media with access to existing pools of knowledge and relevant data.

RCO work centres around two major thrusts: consumer and citizen behaviour with respect to responsible consumption (perceptions, intentions, attitudes and behaviours, levers and impediments) and the marketing of responsible goods and services, namely the supply side of responsible consumption (distribution, packaging, eco-design, brand management, certification strategies, brand alliances, pricing strategies, promotional/communications/awareness management, product lifecycle).

In addition to academic publications, RCO also publishes reports destined for the general public: Responsible Consumption Barometer (2012, 2011, 2010) published in *Protégez-Vous* magazine; Responsible Communication Report Card – Part 1: Insights and Best Practices: A Guide for the Québec Market (February 2012); Guide to Ethical Fashion in Québec (November 2011); Guide to Ecotourism in Québec (October 2011); Report on green positioning strategies in Québec's household cleaning product sector (June 2011) in cooperation with *Éthiquette pour un marché responsable*.

This RCO survey was made possible thanks to the generous sponsorship support of TD Bank Group.

According to Guy Vézina, Senior Vice President, General Insurance Products, TD Insurance: "*At TD, we are constantly looking for ways to strengthen our position as an environmental leader, which includes getting a better understanding of the behaviours and motivations of responsible consumers. Ontario is a major economic hub, where important strategic and policy decisions are made by many head offices and by government. Gathering valid data on responsible consumption in Ontario was thus a necessity for the various contributors to responsible consumption in Canada.*"

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Dr Durif's research focuses on ethical governance and responsible consumption.

He has published more than 100 papers in academic reviews *(e.g. Journal of Business Research, Journal of Relationship Marketing, International Journal of Sustainable Development, Electronic Green Journal, Innovative Marketing, International Review of Business Research Papers, World Review of Business Research, Banks & Bank Systems, Gestion, Revue Française de Gestion, Revue Française du Marketing, Organisations & Territoires)* and at international conferences *(e.g. American Marketing Association, European Marketing Academy, International Conference Promoting Business Ethics, International Business Research Conference, Association Française du Marketing, Global Marketing Conference, International Nonprofit and Social Marketing, The European Institute of Retailing and Services Studies, Administrative Sciences Association of Canada).*

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Dr Boivin's research interests revolve around green certification, responsible consumption and pricing strategy.

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SUMMARY

Why the Ontario Responsible Consumption Index?

For an number of years now, the majority of academic and professional studies have pointed to consistent progress in the matter of responsible consumption.

- Social and environmental challenges have attracted considerable media coverage in recent years
- The supply of socially responsible (SR) goods and services has expanded rapidly as has the importance of these concerns in the minds of some consumers

What is responsible consumption?

We define responsible consumption as:

- Purchasing behaviours based on social (e.g. fair-trade products) and environmental (e.g. green products) criteria;
- Non-purchasing behaviours based on the fact that a good/service or a brand/company is not consistent with its social and environmental criteria;
- And post-purchasing behaviours (e.g. recycling, composting, reusing, donating).

What is the situation in Ontario?

- Today, we know little about the responsible consumption habits of Ontarians. Few studies have been conducted in this field and it is difficult to assess the magnitude of the phenomenon given the contradictory nature of the evaluation measures employed.
- Shortcomings are numerous: (1) Measurements do not allow for exhaustive, consistent evaluation of responsible consumption behaviour; (2) Certain measurements based solely upon attitudes and purchase intentions tend to skew social desirability. So, there is an absence of stability respecting responsible consumption findings.
- In 2010, the team at the Responsible Consumption Observatory (RCO) implemented a technique for measuring responsible consumption in Québec (Responsible Consumption Barometer for Québec published in Protégez-Vous magazine). The team proposes an initial measurement of responsible consumption in Ontario. The 2012 Ontario Responsible Consumption Index (ORCI).

In addition to obvious educational and awareness aspects of decided interest to the citizenship and public authorities, ORCI is also an important tool for managers as it provides a detailed portrait of responsible consumption behaviour and enables public/private organizations at home and abroad, including non-profit organizations, to tailor their marketing and/or communications strategies to the dictates of the responsible consumption market.

ORCI: Methodology and calculation procedure

Field survey conducted by MBA Research

- Survey of a sample of 1050 individuals using a self-administered, web-based survey made available during the period from May 15 to 21. Given the non-probabilistic nature of the sample (panel), margin of error calculations do not apply.

ORCI: Calculation procedure

- The 'responsible consumption' construct was measured based on the procedure for developing a scale of measurement for a construct using Churchill's paradigm (1979), readily recognized in the field of marketing. A total of 49 items were used (Likert-type scales from 1 to 10, ranging from 'totally disagree' to 'totally agree').
- The validity of the index was measured using two internal validity statistical analyses: (1) RHO and Cronbach's alpha; and, (2) correlation analysis using perceived consumer effectiveness (PCE) as the control variable linked to responsible consumption behaviour. PCE is the feeling of being able to directly impact a course of events (Webb, Mohr and Harris, 2008).
- ORCI scores out of 100 were calculated based on Antil's recognized responsible consumption approach (1984). The average of these items, reduced to a score out of 100 points, was used to create the index.
- Researchers published an initial version of the scale of measurement (cf. 'Responsible Consumption Index (RCI), an innovative tool for assessing responsible consumption at The 18th Annual International Business Ethics Conference (New York, October 26-29, 2011), which is affiliated with the renowned Journal of Business Ethics.

Survey findings derive from several types of analyses:

- Univariate analyses (results greater than 7 out of 10 were deemed to be consistent with proposals)
- Comparisons of averages
- Cross-tabulation tables
- Factorial analyses
- Cluster analyses

Data was collected from behaviours provided by individual respondents.

ORCI: the panel (n = 1050)

- Male = 45.7%
- Female = 54.3%
- Mean age = 44 years-old
- 69.9% were born in the province of Ontario (11.0% in an other Canadian province; 19.0% in a country other than in Canada)
- 44.9% were married (single: 32.7%; common law union: 11.5%; divorced: 6.0%; widowed: 2.5%; separated: 2.5%)
- 48.8% did not have children (1 child: 16.2%; 2 children: 20.7%; more than 2 children: 14.4%)
- High school diploma or equivalent = 38.6% (university certificate = 26.4%; bachelor's degree = 21.5%; master's degree = 5.8%; no certificate, diploma or degree = 5.7%; doctoral degree = 2.0%)
- 11.3% were members a part of a professional association
- Place of residence: Toronto (39.9%); Middlesex County (9.4%); City of Hamilton (8.2%); City of Ottawa (7.9%); Regional Municipality of Peel (7.5%); Simcoe County (4.7%); Regional Municipality of Niagara (4.6%); Essex County (4.0%)
- Owner = 60.4%
- Single family dwelling = 54.5% (apartment, 5-storey + building = 14.2%; townhouse = 12.1%; semi-detached = 6.4%; apartment, building less than 5 storeys = 6.2%; apartment, duplex = 5.9%; mobile home = 0.8%)
- Annual household income: Over \$100 000 (13.8%); \$30 000 – \$39 999 (11.6%); \$ 50 000 – \$59 999 (11.3%); \$40 000 – \$49 999 (11.0%); \$20 000 – \$29 999 (10.7%); \$60 000 – \$69 999 (9.0%); \$70 000 – \$79 999 (8.1%); \$10 000 – \$19 999 (7.1%); \$80 000 – \$89 999 (6.0%); under \$10 000 (5.9%); \$90 000 – \$99 999 (5.4%)

01 ORCI 2012 under the microscope

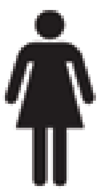
ORCI 2012 worked out to 68.9/100.

This means that Ontarians obtained an average score of 68.9 out of 100 for all responsible consumption behaviours tested (purchases, non-purchases, post-purchases).

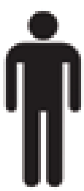
ORCI
Ontario Responsible Consumption Index

68.9*

ORCI varied based on gender



Women's ORCI: 70.4



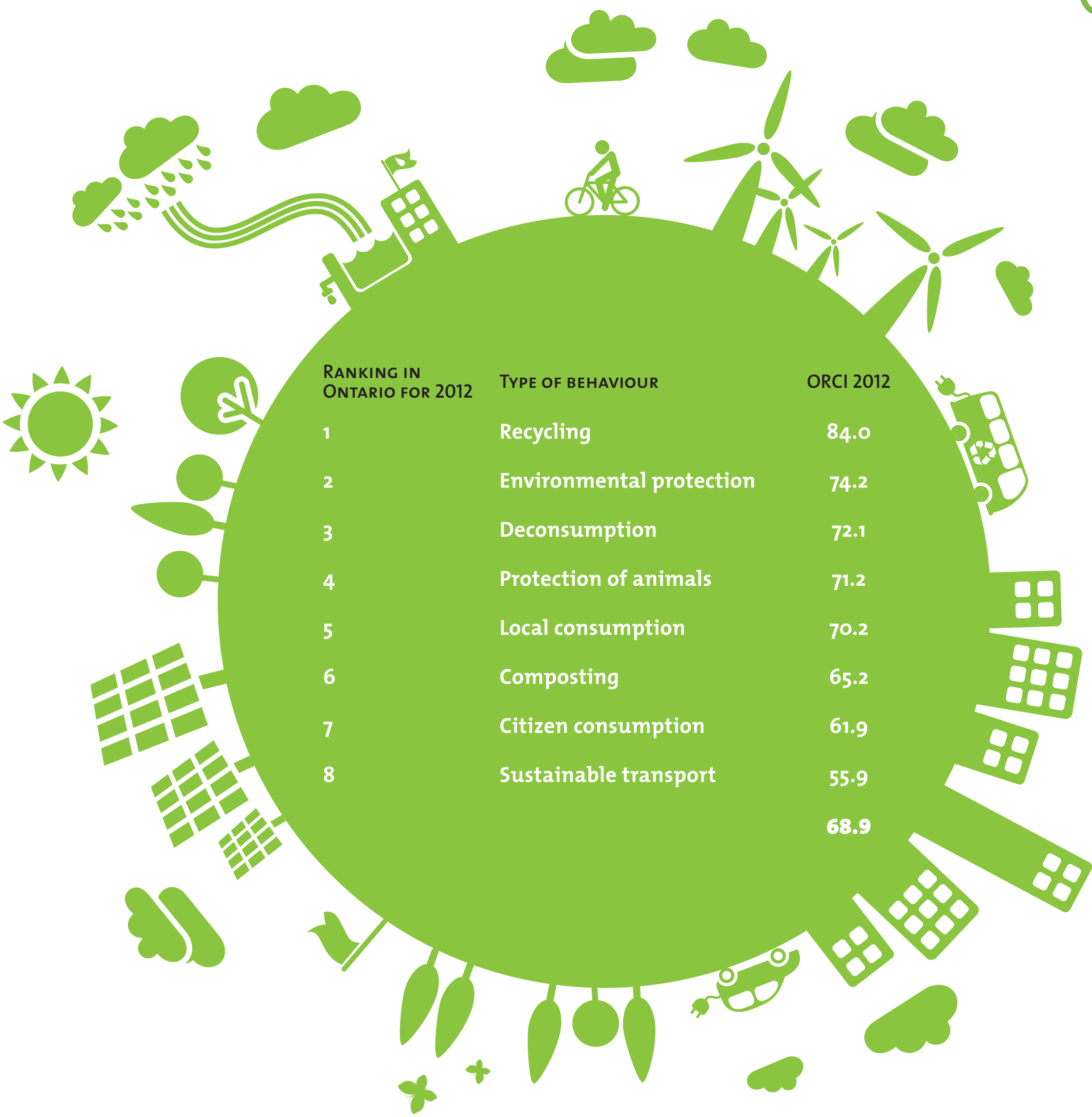
Men's ORCI: 67.0

ORCI varied based on age

ORCI represents a mean reference value (Year '0' in Ontario) which serves as a basis of comparison for studying specific subgroup scores, changes and developments going forward, and behaviours compared with other provinces.

Findings indicate a score of 68.9% for Ontarians in the matter of responsible consumption behaviour, such behaviour being deemed to be responsible based on the 49 items representative of our measure of responsible consumption.

Eight types of responsible behaviour



Ranking in Ontario for 2012	Type of behaviour	ORCI 2012
1	Recycling	84.0
2	Environmental protection	74.2
3	Deconsumption	72.1
4	Protection of animals	71.2
5	Local consumption	70.2
6	Composting	65.2
7	Citizen consumption	61.9
8	Sustainable transport	55.9
		68.9

The ORCI 2012 reflects the multidimensional construct of eight types of responsible behaviour listed in order of importance. This behaviour designates eight separate but complementary ways of engaging in responsible consumption.

01 ORCI 2012 UNDER THE MICROSCOPE

THE INDEX CORRESPONDS TO THE SCORE OBTAINED BY ONTARIANS FOR EACH SPECIFIC FORM OF RESPONSIBLE CONSUMPTION BEHAVIOUR.

RECYCLING: INDEX OF 84.0

Most telling statistics

- Over 82.4% of Ontarians confirmed having recycled paper in the past year:

  82.0%: cardboard
  81.6%: plastic
  79.4%: glass
  76.8%: garbage

Comments

- It is important to note the particularly high percentages of Ontarians who indicated having 'always' recycled (checked '10' on a scale from 1 to 10 where 1 = never and 10 = always): from 49.4% for glass to 50.7% for paper (50.6% for cardboard; 50.1 for plastic).

Most concerned Ontarians:

- Significantly more women than men (66.1% were top recyclers: indicated '9s' and '10s' for overall recycling behaviour)
- Older (46.2 years-old vs 38.5 years-old)
- Property owners: 64.4% of property owners vs 57.9% of tenants
- Middlesex County (City of London): 71.7% were top recyclers

ENVIRONMENTAL PROTECTION: INDEX OF 74.2

Most telling statistics

- In the past 12 months, 68.9% favoured recyclable products
- 65.1% favoured goods made from recyclable materials
- 63.9% favoured goods sold in reusable or recyclable containers or packaging
- 62.6% had bought goods sold in large quantities to avoid wasting packaging
- When given the choice between two equivalent products, 61.4% chose the product which was the least toxic to the environment
- 60.9% had favoured goods with less packaging
- 60.0% favoured biodegradable goods
- Occasionally, 53.1% switched brands owing to environmental convictions
- 48.3% avoided purchasing goods manufactured by highly polluting companies

Most concerned Ontarians:

- Couples with children: 17.8% vs couples with no children (12.1%)
- Women: 17% vs Men: 12.7%
- Older: 47.8 years old vs 42.5 years old

Deconsumption: Index of 72.1

Most telling statistics

- In the past 12 months, 69.6% favoured reusable products
- 68.9% refrained from purchasing goods/ services which they did not really need
- 68.7% reduced their energy consumption
- 66.6% repaired a broken/faulty product rather than replacing it with a new one
- 63.7% had minimized their fuel consumption
- In general, 62.1% reduced overall consumption
- 61.3% favoured more sustainable products

Comments

- Important to observe this type of behaviour from one year to the next given the weighty economic consequences

Most concerned Ontarians:

- Women: 24.2% vs Men: 18.1%
- Older: 46.7 years old vs 42.3 years old

Protection of animals: Index of 71.2

Most telling statistics

- 66.9%, over the past 12 months, avoided consuming food made from endangered animal species
- 65.0% avoided purchasing goods made from endangered animal species
- 61.3% favoured goods made by manufacturers which did not treat animals cruelly
- 55.6% avoided purchasing goods/services made by companies which harmed endangered animal or plant species

Comments

- It is important to note the high percentage (35.7%) of Ontarians who indicated having ‘always’ avoided, in the past year, consuming food made from endangered animal species.

Most concerned Ontarians:

- Women: 35.2% vs Men: 22.9%
- Couples with children: 25.3% vs couples with no children: 20.2%
- Older: 45 years old vs 42.6 years old

01 ORCI 2012 UNDER THE MICROSCOPE

LOCAL CONSUMPTION: INDEX OF 70.2

Most telling statistics

- 67.4% chose a local product when offered a choice between a local product and non-local product
- 65.4% had favoured locally grown products
- 64.4% favoured locally made products in the past 12 months
- 55.9% favoured local purchases
- 53.8% favoured goods purchased from local merchants:

Comments

- Even though the local consumption index ranked 5th in Ontario, the level of local consumption remained high (70.2)
- Findings proved consistent with those of the 2011 survey commissioned by Farm Credit Canada respecting the consumption of local and Canadian products at the national level.

Most concerned Ontarians:

- Women: 24.9% vs Men: 19.1%
- Couples with children: 27.3% vs couples with no children: 16.9%
- Older: 47.9 years old vs 42.0 years old

COMPOSTING: INDEX OF 65.2

Most telling statistics

- In the past 12 months, 54.2% indicated having composted household waste:

  58.2% composted yard waste
  57.8% composted autumn leaves
  56.7% composted kitchen waste

Comments

- Spread of 20.6 points with Québec (greatest spread in observed behaviour).

Most concerned Ontarians:

- Couples with children: 36.8% vs couples with no children: 24.0%
- Simcoe County: 55.0%; Regional Municipality of Niagara: 39.5%
- Property owners: 34.8% vs Tenants: 24.0%
- Older: 46.5 years old vs 41.9 years old

Citizen consumption: Index of 61.9

Most telling statistics

- 56.6% avoided purchasing products made by companies which use child labour
- Whenever possible, 50.6% purchased goods/services from companies which paid fair wages to their employees
- 50.3% avoided purchasing goods/services from companies the practices of which did not respect their employees
- 48.9% avoided purchasing goods/services from companies the practices of which discriminated against minorities
- 47.2% favoured fair trade goods
- When given the choice, 48.2% purchased goods/services from companies which came to the aid of people in need (48.8% for children's causes; 48.1% for medical research; 46.6% for natural disasters)
- When given the choice between conventional goods and fair trade goods, 47.2% chose fair trade goods.
- 40.4% had switched brands for reasons of social convictions

Sustainable transport: Index of 55.9

Most telling statistics

- In the past 12 months, 59.9% walked to destination
- 44.1% carpooled
- 42.1% took the bus
- 38.5% took the metro/subway
- 34.8% shared their car with other individuals
- 32.6% took the train
- 32.1% biked
- 29.2% used car-sharing systems
- 15.6% used inline skates
- and 14.3% used a hybrid car

Comments

- It is important to point up that 37.7% had avoided using their car to travel to work, while 33.7% avoided using their car for personal trips
- 46% entertained purchasing a hybrid vehicle when the time came to trade in their current vehicle

Most concerned Ontarians:

- Younger: 37.4 years old vs 43.8 years old

02 Ranking of responsible goods and services most consumed by Ontarians

Consumption tending to green

ORCI also assessed purchases of responsible goods and services in the past year as claimed by Ontario consumers. These statistics are important for broadening/expanding the description of the 8 types of responsible consumption behaviour.

Variation in purchases of responsible goods/services in the past year

	Purchases of goods/services which are good for the environment	Purchases of goods/services which guarantee fair working and manufacturing conditions	Purchases of fair trade goods/services
Increased	46.4%	24.9%	21.4%
Decreased	6.7%	10.7%	12.3%
Remained stable	47.0%	64.5%	66.3%

The consumption of green goods and services increased more and decreased less than the consumption of goods/services guaranteeing fair working and manufacturing conditions or the consumption of fair trade goods/services:

- 46.4% of Ontarians indicated having purchased greater numbers of goods/services which were good for the environment in the past year against +24.9% for goods/services guaranteeing favourable working and manufacturing conditions, and +21.4% for fair trade goods/services;
- Among Ontarians who indicated having decreased purchases of responsible goods/services, the smallest decrease (6.7%) was found to be in the category of goods/services good for the environment compared 10.7% for social goods and 12.3% for fair trade goods/services.

Top 5 most responsible brands for Ontarians (brands spontaneously mentioned)

Ontario Top 5

Rank	Brand	%
1	green works	4.19% (44)
2	President's Choice	3.14% (33)
3	Kellogg's	1.52% (16)
4	Coca-Cola	1.14% (12)
5	Starbucks Coffee	1.05% (11)

- Responsible consumption by Ontarians was not brand-based. Rather, it was situated farther upstream in the purchasing process. Consumers demonstrated generally poor knowledge of responsible brands which would point to brand communication issues.
- Thus, when Ontarians were asked to indicate 'which brand' or 'which company' was, in their minds, responsible, over half (53% for brands and 55% for companies) were incapable of doing so. This demonstrated the existence of considerable difficulty in assessing the phenomenon for the majority of Ontarians.
- With respect to the most responsible brands, Greenworks came out on top with only 4.19%, which is to say 44 spontaneous responses by survey respondents who totalled 1050 in number.
- Four of the five brands related directly to the food sector, while two related to household cleaning products (*Greenwoorks* and *President's Choice*).

02 Ranking of responsible goods and services most consumed by Ontarians

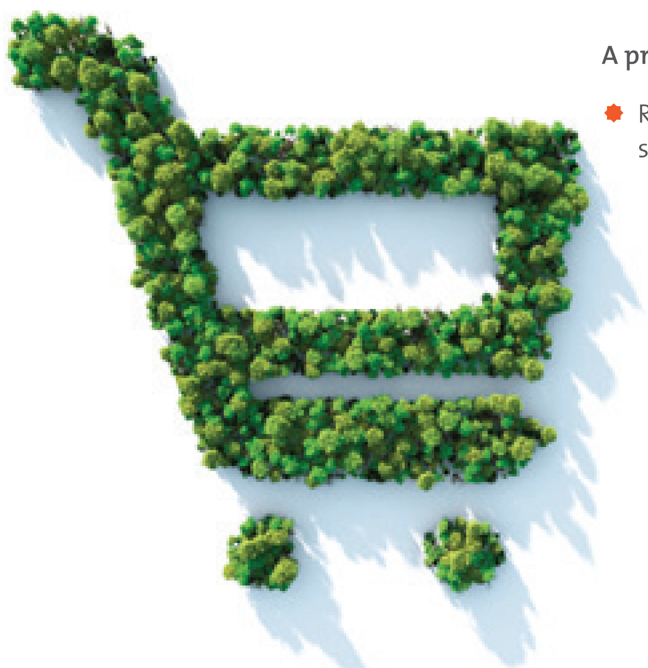
Top 5 most responsible companies for Ontarians (companies spontaneously mentioned)

Ontario Top 5

Rank	Brand	%
1	CLOROX	2.29% (24)
1	P&G Procter & Gamble	2.29% (24)
3	Starbucks Coffee	1.62% (17)
4	Loblaws	1.52% (16)
5	Johnson & Johnson	1.24% (13)

- In the case of most responsible companies, it was also *Clorox* (*Green Works*) which ranked first with just 24 spontaneous responses, which is to say 2.29% of respondents, on par with *Procter & Gamble*.
- Three of the five companies (*Green Works*, *Starbucks* and *Loblaws*) related to three brands found in the Top 5 most responsible brands ranking (*Green Works*, *Starbucks* and *President's Choice*). Note that three of the five companies cited were linked in whole or in part to the household cleaning products sector (*Clorox*, *Procter & Gamble*, *Johnson & Johnson* and *Loblaws*).

Most responsible brands/companies for Ontarians (companies/brands spontaneously mentioned)



A problem of credibility

- Results show that no clear brand or company clearly stands out as eco-responsible:

  Not enough companies are doing a really good job of integrating eco-responsibility into the lifecycles of their products, instilling a eco-responsible culture into their companies and communicating their sustainable brands with credibility and impact.

02

Ranking of responsible goods and services most consumed by Ontarians

Top 10 responsible food products

Ontario Top 10

Rank	Products	Score out of 10*
1	Fresh fruits and vegetables	7.79
2	Locally grown fruits and vegetables	7.18
3	Fair trade coffee	5.49
4	Organic vegetables	5.48
5	Organic fruit	5.34
6	Organic dairy products	5.19
7	Fair trade chocolate	5.16
8	Fair trade fruit	5.11
9	Fair trade tea	5.00
10	Fair trade juice	4.97

*Please indicate how often you purchased the following goods / services in the past 12 months (from 1 'never' to 10 'always')

- Seasonal fruits/vegetables and local produce, for all categories combined, remained the two responsible products most purchased by Ontarians.
- The most purchased goods/services were found to be consistent with the five leading responsible consumption behaviours, namely recycling, environmental protection, enhanced consumption habits, protection of animals, and local sourcing.

Top 10 products/behaviours linked to household equipment

Ontario Top 10

Rank	Products/Behaviours	Score out of 10
1	Compact fluorescent light bulbs	7.15
2	Energy Star certified appliances	6.76
3	Rechargeable batteries	6.72
4	LED light bulbs	6.22
5	Garden products free of chemical pesticides	5.95
6	Eco-friendly insecticides	5.45
7	Eco-friendly fertilizers	5.44
8	Water-based adhesives and finishes	5.38
9	Eco-friendly paint	4.88
10	Eco-friendly construction tools	4.06

- 45.0% of Ontarians indicated that, when next purchasing/renting a house/condo/ apartment, they would consider a 'green' house/condo/apartment, which is to say a LEED certified building or construction prioritizing the use of eco-friendly materials.

02

Ranking of responsible goods and services most consumed by Ontarians

Top 10 leading consumer products

Ontario Top 10

Rank	Products\Behaviours	Score out of 10
1	Paper towels made from recycled paper	6.59
2	Bathroom tissue made from recycled paper	6.52
3	Printing paper made from recycled paper	6.39
4	Biodegradable garbage bags	6.35
5	Green household products	6.25
6	Paper tissues made from recycled paper	6.22
7	Fair trade cotton clothing	4.61
8	Accessories made from eco-friendly fabrics	4.61
9	Fair trade cotton accessories	4.32
10	Toys made from recycled materials	4.21

- Products made from recycled paper remained strongly in demand by Ontarians: paper towels, printing paper, toilet paper and paper tissues. The ‘recycled’ aspect proved a major drawing card.
- From the standpoint of demonstrated behaviour, 76.0% of Ontarians used reusable bags when grocery shopping.

Most readily adopted sustainable tourism behaviours

Rank	Behaviours	%
1	I make an effort not to cause damage to natural sites that I visit	68.6
2	I make an attempt to disturb or contaminate as little as possible natural areas visited	62.0
3	I avoid excessive air travel	56.0
4	When travelling, I always make an effort to honour the values of the local people	55.5
5	I favour outings close to home when I want to get away for a few days	53.6
6	When travelling, I make certain that the local people are not inconvenienced by my passage	52.9
7	For holidays, I generally favour outings close to home	50.5

- 28 types of sustainable tourism behaviours were tested. Only those behaviours which obtained the agreement of over half of total respondents (50.0% +) are mentioned herein.
- It was action linked to protection of the environment that was most demanded by Ontarians. Next came action honouring the cultural values of peoples visited.

02 Ranking of responsible goods and services most consumed by Ontarians

Most readily adopted collaborative consumption behaviours

Rank	Behaviours	%
1	Purchases of second-hand goods	55.2
2	Sharing of equipment with other individuals	38.9
3	Sharing of services with other individuals	35.2
4	Purchases of goods/services via group purchase websites	28.6
5	Rental of equipment from companies	27.5
6	Rental of equipment from individuals	25.4
7	Pratice of couchsurfing	14.2

Emergence of collaborative consumption

- Since the economic crisis of 2008, so-called collaborative consumption behaviour (economic model whereby usage overrides ownership) has developed in the majority of industrialized nations, especially in France. Ontario is no exception and various collaborative behaviours have begun to emerge.

Most prevalent financially-related forms of responsible behaviour

Rank	Behaviours	%
1	Donations to foundations and charities	76.4
2	Purchase of ethical funds	21.4
3	Members of credit unions	16.8

Ethical funds	%
The next time I have to invest money, I will consider ethical funds	36.7
Companies included in ethical funds have been carefully screened based on social responsibility criteria	28.2
Ethical funds have lower performance ratings than the other types of funds	23.6
I am willing to live with the potentially lower performance of an ethical fund	24.2

- The key issue related to the lack of consumer confidence in the eco-responsible filters used to select companies for ethical funds

03

Ontario consumer profiles: impediments and motivations relating to responsible consumption

Fewer and fewer impediments

Ontarian profiles

Characteristics of consumers from least to most responsible

Anti responsible consumption

10.8% of consumers - ORCI score: 37.1

- Lowest ORCI scores for all responsible behaviours except recycling
- Most important behaviour: Recycling (70.8)
- Least important behaviour: Citizen consumption (23.3)

- Majority men (55.8%)
- Average age of 43.6 years
- High proportion of married individuals (47.8% vs 44.9%)
- Group with lowest level of trust in players active in sustainable development (SD) (e.g. 3.35/10 for corporate environmental ads)

- Group least motivated in all categories of motivation
- Leading motivation: Environment (4.70/10)
- Leading impediment: Price (7.12/10)

Average responsible consumption

03

18.8% of consumers - ORCI score: 56.9

- In 4th place for all responsible behaviours except sustainable transport and citizen consumption (3rd)
- Most important behaviour: Environmental protection (60.0)
- Least important behaviour: Recycling (55.4)

- Greatest use of hybrid vehicles
- Greatest use of inline skates
- Advocates of couchsurfing
- Regular purchasers via group purchase websites
- Purchasers of more organic and fair trade products than the Average + group

- Majority men (51.8%)
- Average age of 34.4 years (youngest group)
- Proportion higher than for average tenants (46.2% vs 39.6%)
- Proportion higher than for average couples with no children (60.4% vs 48.8%)
- Higher proportion of singles (47.2% vs 32.7%)
- Higher proportion of university graduates (38.1% vs 29.3%)
- Group with higher level of trust in players active in SD than Average +
- Group with 2nd highest level of label awareness

- Leading motivation: Health and environment (5.88/10; 5.84/10)
- Group for which product design/style was relatively important (2nd out of 5; 5.45/10)
- Leading impediment: Price (6.03/10); impediments about equal (all between 5.6 and 6.03)

03 Ontario consumer profiles: impediments and motivations relating to responsible consumption

Average + responsible consumption

24.8% of consumers - ORCI score: 64.1

- In 3rd position for all responsible behaviours except for sustainable transport and citizen consumption (4th) and recycling (2nd).
- Most important behaviour: Recycling (93.8)
- Least important behaviour: Sustainable transport (42.5)
- Consumers of more local and traditional products (e.g. green household products, paper products) than Average group

- Majority of women (53.8%)
- Average age of 49.2 years-old (oldest group)
- Proportion higher than for average property owners (69.6% vs 60.4%)
- Proportion higher than for average couples with children (58.8% vs 51.2%)
- Higher proportion of married individuals (53.5% vs 44.9%)
- Group with highest income: 40.4% earned over $70 000 (vs 33.3% for all respondents)
- Group less trusting of players active in SD than Average group except with respect to official certifications

- Leading motivation: Environment (6.27/10)
- One of two groups least interested in product design/style
- Leading impediment: Price (6.75/10)

Pro responsible consumption

27.8% of consumers - ORCI score: 80.4

- In 2nd place for all manner of responsible consumption behaviours except for recycling (1st).
- Most important behaviour: Recycling (94.8)
- Least important behaviour: Sustainable transport (57.0)

- Majority women (63.4%)
- Average age of 47.4 years
- Proportion higher than for average couples with children (57.5% vs 51.2%)
- High proportion of married individuals (46.6% vs 44.9%)

- Leading motivation: Environment (7.35/10)
- Leading impediment: Price (6.55/10)
- Least important impediment: Efficacy (4.65/10)

Pro + responsible consumption

17.9% of consumers - ORCI score: 88.3

- Highest average score for all ORCI behaviours except for recycling (2nd)
- Most important behaviour: Environmental protection (94.2)
- Least important behaviour: Citizen consumption (83.0)

- Greatest users of hybrid vehicles
- Greatest users of inline skates
- Advocates of sharing of services/equipment among individuals
- Advocates of couchsurfing
- Purchasers of large numbers of second-hand goods
- Regular purchasers via group purchase websites

- Majority women (53.2%)
- Average age of 37.8 years
- Higher proportion of singles (43.6% vs 32.7%)
- Higher proportion of university graduates (39.9% vs 29.3%)
- 27.1% earned less than $30 000
- Group with highest level of trust in all players active in SD
- Group with highest level of label awareness

- Leading motivation: Environment (8.2/10)
- Group most motivated with respect to all manner of motivations
- Leading impediment: General information (6.74/10)
- Least important impediment: Time (5.91/10)

03 Ontario consumer profiles: impediments and motivations relating to responsible consumption

Impediments and motivations relating to responsible consumption

Drivers of responsible consumption

Responsible consumption impediments ranking

Ontario Top 5

Rank	Impediments	Average score out of 10
1	Price	6.57
2	General information	6.08
3	Certification information	5.98
4	Waste of time	5.64
5	Efficiency	5.27

Impediment: Price

Remains a leading impediment	Relevant statistics

For 60.9%, the socially responsible goods/services were **too expensive**

For 59.7%, these goods/services were too high-priced versus comparable items

For 50.9%, budget concerns prevented them from purchasing these goods/services

For 43.9%, they lacked trust the pricing of these goods/services

Impediment: General information

Impediment of determining impact	Relevant statistics
	For 48.7%, there was not enough information on the environmental and social benefits of products For 45.5%, there was not enough information pertaining to product origin For 43.7%, there was not enough advertising For 42.2%, there was not enough information pertaining to product composition

Impediment: Certification information

Always an issue of concern	Relevant statistics
	For 51.0%, there was not enough information on the meaning of green and fair trade certifications
	For 46.3%, green and fair trade certifications were not readily recognizable
	For 45.9%, it was not easy to understand green and fair trade certifications
	For 30.3%, there were too many green and fair trade certifications on goods and/or packages

03

Ontario consumer profiles: impediments and motivations relating to responsible consumption

Impediment: Waste of time

Aspect less and less perceived as an impediment	Relevant statistics
	For 46.3%, there were not enough ethical goods/services from which to choose For 43.3%, precious time had to be spent in stores during the purchase process to read information and compare products For 35.5%, they did not want to waste time selecting these goods/services as they had to be sought out in several stores before they could be found For 32.2%, they did not want to waste time selecting these goods/services as they are not readily recognizable in stores

Impediment: Efficiency

Impediment of declining importance	Relevant statistics
	For 44.5%, there were not enough samples available for testing For 35.1%, the efficiency of these goods/services remained an issue For 32.8%, the performance level of these goods/services remained an issue For 27.6% there was lacking of trust in the performance level of these goods/services

Responsible consumption motivations ranking

Ontario Top 5

Rank	Motivations	Average score out of 10
1	Environmental benefits	6.67
2	Health benefits	6.53
3	Benefits for society	6.44
4	Benefits in terms of personal and social image	6.18
5	Product style/design	5.13

Motivation: Benefits for the environment

Major motivation	Relevant statistics
	For 64.8%, these goods/services were better for the environment For 60.3%, these goods/services were beneficial as they were less harmful to the environment For 58.2%, these goods/services were preferable because of their positive impact on the environment For 54.6%, these goods/services were more respectful of the environment than other goods/services in the same category

03 Ontario consumer profiles: impediments and motivations relating to responsible consumption

Motivation: Benefits for personal health

Major motivation	Relevant statistics
	For 57.4%, these goods/services were better for human health than other goods/services in the same category For 48.4%, there were fewer health side-effects when using these goods/services For 47.7%, the use of these goods/services lowered risks to personalhealth

Motivation: Benefits for society

Important motivation	Relevant statistics
	For 52.8%, these goods/services were better than others as they are respectful of people and population groups For 49.9%, these goods/services were beneficial as they contributed to a fairer distribution of resources across world population groups For 48.8%, these goods/services had a positive impact on local employment For 44.5%, these goods/services were preferable as profits are redistributed more fairly across world population groups

Motivation: Benefits for personal and social image

Motivation not to be overlooked, especially in communications	Relevant statistics
For 56.2%, choosing these goods/services resulted in enhanced levels of satisfaction	For 48.1%, these goods/services enhanced their self-image
For 54.7%, they experienced the feeling of having done something good for society	For 39.9%, choosing these goods/services helped boost their self-esteem
For 50.6%, these goods/services provided them with the feeling of being a good person	For 38.9%, these goods/services provided for enhanced self-image with others
For 48.9%, choosing these goods/services brought personal satisfaction	For 32.1%, others reacted positively when they choose these goods/ services
	For 30.5%, choosing these goods/services resulted in a sense of approval from others

Motivation: Product style/design

New motivation	Relevant statistics
	For 27.6%, these products are designed more attractively
	For 25.3%, these products are more stylish
	For 25.2%, these products are preferred in appearance over others
	For 23.8%, these products are more fashionable
	For 23.6%, these products are prettier

04 Ontarians tending te be green but sceptical

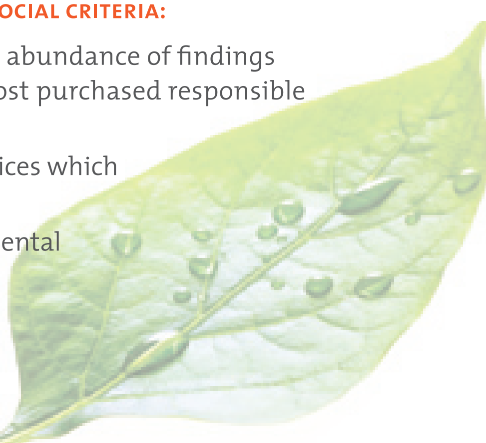
Scepticism to be monitored...

Strong green consumption trend

Environmental aspect more important than social aspect in terms of behaviour...

For respondents, environmental criteria generally outweighed social criteria:

- This prioritizing of environmental issues can be observed in an abundance of findings (e.g. ranking of eight responsible behaviours and ranking of most purchased responsible products by category)
- 46.4% of Ontarians claimed to have purchased more goods/services which were good for the environment in the past year
- Occasionally, 53.1% had switched brands for reasons of environmental convictions reasons



...but also in terms of perceptions...

For Ontarians consuming 'responsibly' means:

- First and foremost, purchasing environment-friendly goods/services (73.8%);
- Refusing to purchase goods/services that they did not really need (73.7%);
- And also, purchasing goods/services that met social conditions or labour standards (71.3%); reducing overall consumption levels (70.5%); purchasing fair trade goods/services (66.8%); sharing or renting of goods/services in place of purchasing them (56.3%); and purchasing organic goods (51.0%).

...concerns and responsibilities

Ontarians demonstrate concern for the environment:

- 83.8% of Ontarians deeemd protection of water resources and personal health as especially important societal concerns; 82.1% were concerned about air quality; 79.3% about battling pollution and 78.6% about safeguarding natural resources.

Ontarian accept responsibility for their environmental concerns:

- For 72.4% of Ontarians, responsibility for the environment lay first and foremost in consumer hands, then with large companies (68.9%) and government (66.0%), and to a lesser extent with environmental groups such as Greenpeace (57.1%).

Consumers nonetheless remain sceptical...

Level of trust of Ontarians

Ranking	Players / Benefits	%
1	Official environmental certifications	48.2%
2	Official fair trade certifications	47.2
3	Environmental benefits of so-called environment-friendly goods/services	41.6
4	Social benefits so-called environment-friendly goods/ services	40.2
5	Corporate commitment to SD	32.4
6	Environmental doctrine of lobby groups (e.g. NGOs, associations)	30.8
7	Corporate environmental ads pertaining to goods/services	30.5
8	Advertising agencies	26.1
9	Politicians' views on SD	25.0

Scepticism with respect to players active in sustainable development

- Of the ten players in sustainable development and benefits of responsible goods/services tested, none ranked over 50% on the issue of trust.
- Ontarians more trusting (48.2%) of official environmental certifications.
- It is important to underscore the considerable mistrust of companies.
  - Indeed, only 32.4% of respondents trusted corporate commitment to sustainable development
  - and barely 30.5% believed environment-oriented brand advertising.

...are always on the outlook for more information...

Channels privileged by Ontarians
for gathering information on responsible goods/services

Rank	Channels	Utilization rate
1	Information available on packaging	50.9%
2	Circle of friends and colleagues	47.3%
3	TV documentaries	47.2%
4	Academic or scientific experts	45.0%
5	TV media	40.7%
6	Websites on responsible consumption	39.8%
7	Print media	38.0%
8	Corporate environmental ads	36.4%
9	Websites which recommend goods/services	36.3%
10	Reports from non-governmental organizations	35.4%
11	Reports from official certification organizations	34.5%
12	Manufacturers' websites	33.5%
13	Internet Forums	31.5%
14	Reports from university research centres	31.0%

Rank	Channels	Utilization rate
15	Blogs	28.4%
16	Social networks (e.g. Facebook, Twitter, etc.)	28.4%
17	Online shopping sites	28.2%
18	Radio media	25.4%
19	Government	18.6%

Ontarians were keenly focused on garnering additional information but all channels of communication were not solicited in the same fashion. To learn about the characteristics of responsible goods/services, Ontarians turned first to product packaging (50.9%), then their immediate circle of friends/colleagues (47.3%), followed by TV documentaries (47.2%) and university reports (45.0%).

Ontarians tending te be green but sceptical

…and are decidedly less knowledgeable about labelling

Rank	Labels	Recognition rate
1	Energy Star	82.2%
2	Foodland Ontario Organic	66.9%
3	EnerGuide for appliances	63.3%
4	Fairtrade Canada	48.3%
5	Canada Organic	47.4%
6	Ontario National Food Co-op	41.3%
7	Green-e Energy	40.3%
8	Animal Welfare Approved	38.1%
9	R-200	35.1%
10	Sustainable Forestry Council (SFI)	29.7%
11	UL Energy Efficiency Verified	28.5%
12	EcoLogo	27.9%
13	Forest Stewarship Council Canada (FSC)	27.1%
14	Local Food Plus – Certified Local Sustainable	27.0%
15	Earth Check	25.6%

04

Rank	Labels	Recognition rate
16	Environmentally Preferable Product (EPD)	25.3%
17	Assure Quality Organic Standard	22.0%
18	Built Green	21.8%
19	Environmental Product Development (EPD)	21.8%
20	Green Business Bureau	20.3%
21	Global Sustainable Tourism Council (GSTD)	20.2%
22	EcoSchools	19.5%
23	Climate Registry	19.2%
24	Audubon Green Leaf Program	19.0%
25	International Organic and Natural Cosmetics Corporation	18.5%
26	Nursery Sod Growers Association of Ontario (NSGA)	18.0%
27	Ecocert	17.4%
28	Golf Environment Organization (GEO)	16.9%
29	Hike Ontario Services	16.9%
30	Global Organic Textile Standard	16.1%
31	Clean Marine Green Leaf Eco-rating Program	15.0%
32	NON GMO Project	14.8%

- Of the 32 labels tested in four categories (food, energy/ construction, tourism and other), only three were known/recognized by over 50% of consumers:
  - Energy Star (82.2%)
  - Foodland Ontario Organic (66.9%)
  - EnerGuide for appliances (63.3%)
- It is interesting to observe that the official eco-label of Environment Canada, the EcoLogo, was recognized by only 27.9% of Ontario consumers.
- The level of knowledge was found to vary in accordance with label category:
  - Energy/construction: 39.25%
  - Food: 33.34%
  - Other: 22.15%
  - Tourism: 19.72%

05 What does the study teach us?

RCO's Analysis

This initial study into the state of responsible consumption in Ontario points up a non-negligible passing grade for Ontarians, which is to say an ORCI 2012 score of 68.9 out of a maximum of 100. Ontarians scored substantially higher than their Québec counterparts (+ 6.5 points). This finding demonstrates that responsible consumption impacts the majority of Ontarians and not just an avant-garde group of individuals. Indeed, over 45.7% of Ontarians, given a Responsible Consumption Index of over 80.4, can be said to be proponents of responsible consumption.

Women (70.4) and seniors (70 and over: 72.4) were found to be the most responsible Ontarians from the standpoint of consumption behaviour.

05

One of the highlights of the study, given the responsible consumption concerns, behaviours and purchasing patterns of Ontarians, is that Ontario consumers can be considered 'green'. They are strongly involved in recycling and highly committed, through their consumption patterns, to protecting animals and the environment. Their consumption of green goods/services has increased by 46.4% in the last year alone based on responses given. Thus they are keen advocates of seasonal fruits/ vegetables and local produce, green household products, compact fluorescent light bulbs and products made from recycled paper.

If responsible consumption in Ontario is largely motivated by the perceived environmental benefits of behaviour of the like, it is important to note that a substantial proportion of Ontarians are sensitive to the beneficial impact on personal and social image. Responsible consumption is therefore image-related!

It comes as no surprise that Ontarians found price to be the key impediment to the purchase of responsible goods/services. Although this impediment is of decreasing importance, information about responsible goods/services and certifications appearing thereon represent impediments of ever increasing importance. Ontarians are little aware of existing certifications other than Energy Star (82.2%), Foodland Ontario (66.9%) and EnerGuide for appliances (63.3%).

The other key study finding relates to the high level of scepticism demonstrated by Ontarians with respect to players in sustainable development and the stated benefits of responsible goods/services (none ranked over 50% on the issue of trust). Ontarians have little faith in environmental advertising and corporate commitment to sustainable development. Thus when asked to indicate 'which brand' or 'which company' was, in their minds, 'responsible', over half of Ontarians (53% for brands and 55% for companies) were incapable of doing so. By way of contrast, Clorox (most responsible company) and its GreenWorks brand (most responsible brand) were found to stand out from the crowd.

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OCR Responsible Consumption Observatory

A study conducted with the support of TD Bank Group