

The Ethical Consumer - Canada - February 2020

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

While price and quality continue to be the top factors considered when making purchases, consumer optimism that actions taken now can have a positive impact is driving some to forgo these basics in favour of more ethical choices. Brands are seen as an integral part of this endeavour, leading to greater scrutiny on companies than ever before. As consumers assess company commitment to CSR policies, transparency in how brand ethos is lived and breathed through all levels is vital.

This Report looks at attitudes toward shopping from ethically reputable brands, the impact of brand ethics and behaviours on shopping habits, consumer expectations from companies and claims that motivate them toward purchases.

- **The mindset is shifting: some forgo the basics in favour of ethical considerations**
- **Consumers expect integrity, compassion and transparency**
- **Consumers question commitments to CSR**



“The bulk of Canadians consider themselves to be conscious shoppers, meaning that brands today must find ways to integrate corporate social responsibility policies as part of their identity.”

– Carol Wong-Li, Associate Director - Lifestyles & Leisure

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- What you need to know

EXECUTIVE SUMMARY

- The insights
- The mindset is shifting: some forgo the basics in favour of ethical considerations
Figure 1: Importance of purchasing from ethical companies and willingness to pay more for products from socially responsible companies (% any agree), December 2019
- Consumers expect integrity, compassion and transparency
Figure 2: Expectations of corporate responsibility, December 2019
- Consumers question commitments to CSR
Figure 3: Brands only have social responsibility policies to make more money (% any agree), December 2019
- The opportunities
- Companies need not step too far from current actions to hold sway
Figure 4: Frequency of making purchases based on brand reputation for ethical practices, December 2019
- Targeting the long game for Gen Z means thinking about the transition
Figure 5: Select attitudes on choosing ethically reputable companies, 18-34 vs overall, December 2019
- Where possible, start the focus closer to home
Figure 6: TURF Analysis – Claims that would encourage purchase, December 2019
- What it means

THE MARKET – WHAT YOU NEED TO KNOW

- Economic pressures will drive greater scrutiny
- The issue of inclusion and diversity is personal for Gen Z
- Young men and fathers are the least hopeful about the environment

MARKET FACTORS

- Economic considerations may have more of an impact this year
- Consumers are feeling the pinch

Figure 7: Perception of financial health, January/February 2016-19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 8: Monthly movement in selected components of the Canadian Consumer Price Index, seasonally adjusted, January 2015–December 2019

- **For the time being, price takes precedence above all**

Figure 9: Factors influencing repeat purchases from a company, April 2019

- **Inclusivity and diversity will feel more personal to Gen Z**
- **Immigration is literally changing the face of the nation**

Figure 10: Distribution of foreign-born population in Canada, by region of birth, 1871 to 2036

- **The biggest impact is seen on Gen Z**

Figure 11: Self-identification of ethnicity, by generation, June 2019

- **More diversity means a different face of mainstream Canada**

Figure 12: I am part of mainstream Canada (% agree), by generation, January 2018

- **Young men and fathers more likely to feel hopeless about the environment**

Figure 13: My individual choices have little impact on the environment (% agree), men 18–34 and fathers with under-18s at home vs overall, December 2019

Figure 14: Nothing can be done to save the environment at this point (% any agree), men 18–34 and fathers with under-18s at home vs overall December 2019

KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Waste reduction, a priority for the government and the people**
- **The BPC sector helps sheds light on how products are made**
- **Gen Z is at the helm**
- **Canadians question brand motivation behind CSR policies**
- **The future will be filled with loop-based systems**

WHAT'S WORKING?

- **Eyes on waste reduction for both the government and the people**
- **Consumers have hope and feel brand actions can make a difference**

Figure 15: Attitudes toward the potential impact of change, December 2019

- **The federal government spotlights single-use plastics**
- **Canadian grocers take on the challenge**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 16: SOBEYS, January 2020

- **And don't forget that in some areas, it already pays to reduce waste**
- **Clean in BPC illuminates how products are made and what's inside**

Figure 17: Ethical and environmental claims that would encourage purchase, women vs men, December 2019

Figure 18: Lush How It's Made: Eggplant Soap, February 2020

Figure 19: Lush Cosmetics North America Instagram post, January 2020

Figure 20: Sephora, June 2018

- **Gen Z is already there and making a real impact**
- **Inspiring action in real life**

Figure 21: TIME Instagram post, December 2019

- **The data confirms that the mindset is different for Gen Z**

Figure 22: Top five most important values Canadians should have, Gen Z vs Millennials vs older generations, June 2019

WHAT'S A CHALLENGE?

- **Consumers question commitment**
- **Brand efforts toward ethics aren't seen as genuine by many**

Figure 23: Brands only have social responsibility policies to make more money (% any agree), 18-34s vs over-35s, December 2019

- **Targets set for the near future are on the rise but still feel intangible**

Figure 24: Microsoft Instagram post, January 2020

Figure 25: Levi Strauss & Co. Instagram post, August 2019

Figure 26: World Without Waste, January 2018

- **Keep it real and keep them updated**

Figure 27: Frank And Oak Instagram post, January 2020

Figure 28: Frank And Oak Instagram post, January 2020

- **Walking the walk, consumers seen accountability at all levels**

Figure 29: Brands only have social responsibility policies to make more money (% any agree), December 2019

WHAT TO WATCH?

- **Waste not, want not: giving less-desirable food a new life**
- **Refreshing the image of shelf-stable or frozen foods as a way to tackle food waste**
- **Apps point consumers toward food expiration dates**

Figure 30: How to Flashfood LIKE A MOTHER, September 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Hydrogen power is now a real thing**
- **Looking ahead, circular closed loop systems will be the norm**

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Some 70% Canadians consider themselves conscious shoppers**
- **Shoppers' behaviours are shifting, increasingly favouring ethics**
- **Consumers expect integrity and compassion from corporations**
- **Consumers vote with their wallets and won't support harm or dishonesty**
- **Canadian pride counts**

CONSUMER INTEREST IN BRAND ETHICS

- **Brand behaviours matter, as 70% claim to be conscious consumers**

Figure 31: Importance of moral/ethical behaviours from companies, December 2019

Figure 32: Importance of purchasing from ethical companies and alignment of personal and brand values (% any agree), December 2019

- **Brands symbolize the identity of Gen Z and Millennials**

Figure 33: It is important that a company's values match my own (% any agree), 18-44s vs 45+, December 2019

- **Gen Z and Millennials need proof**

Figure 34: Everlane Instagram post, September 2019

- **Fathers are also looking for a personal connection**

Figure 35: It is important that a company's values match my own (% any agree), fathers vs overall, December 2019

Figure 36: #TakeTheTime | 5 Dads. 5 Weeks. | Dove Men+Care, May 2019

IMPACT OF BRAND ETHICS ON SHOPPING BEHAVIOUR

- **Shopping behaviours are shifting**
- **The basic factors outweigh brand reputation for ethical practices – for now**

Figure 37: Frequency of making purchases based on brand reputation for ethical practices, December 2019

- **Some are willing to make the trade-off for more ethical choices**

Figure 38: Select attitudes on choosing ethically reputable companies, December 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Those who often shop based on reputation are the main sway opportunity**

Figure 39: Select attitudes on choosing ethically reputable companies (% any agree), often vs sometimes purchase based on brand reputation for ethical behaviour, December 2019

- **For some sectors, start with labelling, as it is easy and obvious**

Figure 40: Kettle Brand Sea Salt Potato Chips (Panama), January 2020

Figure 41: Sephora, June 2018

- **Taking inspiration from a refresh: spotlight on Adidas Futurecraft.loop Shoe**

Figure 42: [FUTURECRAFT.LOOP] – Made to Be Remade, April 2019

Figure 43: [FUTURECRAFT.LOOP] – Long Documentary, April 2019

Figure 44: Adidas Instagram post, November 2019

- **18-34s are the most inclined to forgo the basics in favour of ideals**

Figure 45: Frequency of making purchases based on brand reputation for ethical practices, by age, December 2019

Figure 46: Select attitudes on choosing ethically reputable companies (% any agree), 18-34 vs overall, December 2019

- **Lifestage is a factor, companies must think about the transition**

Figure 47: Chuck Taylor Renew Canvas, July 2019

Figure 48: Converse Instagram post, January 2020

- **Fathers are on-board, though need proof, as they're doing homework**

Figure 49: Select attitudes on choosing ethically reputable companies (% any agree), fathers with under-18s at home vs overall, December 2019

Figure 50: LEGO Instagram post, October 2019

- **Chinese Canadians will pay more and are more apt to switch**

Figure 51: Select attitudes on choosing ethically reputable companies (% any agree), Chinese Canadians vs overall, December 2019

- **Encouraging better choices with tech will resonate**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EXPECTATIONS OF CORPORATE RESPONSIBILITIES

- **Consumers expect companies to act with integrity and compassion**

Figure 52: Expectations of corporate responsibility, December 2019

- **A significant gap exists between men and women under 45**
- **Men under 45 likely less inclined to hold expectations**

Figure 53: Repertoire analysis of brand/company responsibilities chosen, men 18-44 vs overall, December 2019

- **More category engagement leads to greater attentiveness for women**

Figure 54: Expectations of corporate responsibility, men 18-44 vs women 18-44, December 2019

- **Collaborative efforts may improve efficiency in connecting with women 18-44**

Figure 55: P&G Presents: When We Come Together, an Interactive Super Bowl Party, America's Choice, February 2020

Figure 56: Birchbox Instagram post, October 2019

- **Addressing privacy appeals to Boomers**

Figure 57: Select expectations of corporate responsibility, consumers aged 55 or older vs overall, December 2019

- **Assuaging concerns is fast becoming a necessity**

DEAL BREAKERS

- **Remember, a good portion of consumers are considering values**

- **Consumers won't support harm or put up with dishonesty**

Figure 58: Expectations of corporate responsibility, December 2019

- **Companies that lean into the mess fare better than those that do not**

Figure 59: Vogue Italia Instagram post, January 2020

Figure 60: Le sacamos el aire a las Lay's. ¡Miren lo que pasó!, June 2019

- **Personal alignment matters to Gen Z women**

Figure 61: Would stop purchasing from a brand/company if it supports a cause I disagree with, women 18-24 vs overall, December 2019

- **Inclusivity is a must when connecting with Gen Z women**

Figure 62: Lyft Instagram post, June 2019

- **Fair pay is a priority for LGBTQ+**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 63: Would stop purchasing from a brand/company if it does not pay its employees a living wage, LGBTQ+ vs overall, December 2019

INTEREST IN CLAIMS

- **Oh Canada! Consumers are motivated by our home and natural land**

Figure 64: Claims that would encourage purchase, December 2019

Figure 65: TURF analysis – claims that would encourage purchase, December 2019

- **Focus on Made in Canada to sway Boomers**

Figure 66: Local and Canadian-related claims that would encourage purchase, over 55s vs overall, December 2019

- **Tapping into local pride matters to Quebecers**

Figure 67: Motivated to buy products with "locally made" claim, Quebec vs overall, December 2019

Figure 68: It is important that a company's values match my own (% any agree), Quebec vs overall, December 2019

Figure 69: Caffé Bene Instagram post, December 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Consumer qualitative research
- Abbreviations
- Terms

APPENDIX – TURF ANALYSIS

- Methodology

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.