

Global Lifestyle of Health and Sustainability

An overview on the growing global market and
consumer base for sustainable products and services

August 2008



Moxie Design Group Limited



Introduction

In 2003 the term LOHAS finally made the mainstream press with an article explaining who they were in the New York Times.

“LOHAS markets may be the biggest market you have never heard of, encompassing things like organic foods, energy-efficient appliances and solar panels as well as alternative medicine, yoga tapes and eco-tourism.”

New York Times

LOHAS has been identified as an emerging market in the USA and has been the subject of significant social and market research.

They are seeking solutions that match the way they want to live. They are well-informed and strong advocates for sustainable businesses, products and services and the markets they represent continue to spread throughout the globe.

LOHAS matter as their numbers are set to grow in coming years. They're vocal supporters of innovative and sustainable products and services, and are opinion leaders that continue to shape sustainability from the public's perspective.

In 2008 Moxie Design Group, with the support of New Zealand Trade and Enterprise, collected and compared LOHAS research from throughout the world with the New Zealand equivalent, the 'Solution Seekers' group.

This summary provides an introduction to LOHAS consumers and markets.

Useful definitions

LIFESTYLES OF HEALTH AND SUSTAINABILITY (LOHAS)

LOHAS is an acronym for Lifestyles of Health & Sustainability, a term used to describe a type of consumer and the marketplace these consumers participate in. They seek out goods and services focused on health, the environment, social justice, personal development and sustainable living.

The term LOHAS was coined in 1999 by Conscious Media, founders of the LOHAS Journal in the USA. Conscious Media built on the research into Cultural Creatives, providing a more in-depth market perspective of this emerging social phenomenon. Growing consumer interest in a wide range of sectors, such as alternative medicine, organic foods and energy efficient household appliances was seen as proof of shifting consumer values based on sustainability, environmental and social responsibility concerns.

LOHAS consumers have common traits that are consistent across each of the sectors they buy from. All the countries that have conducted LOHAS research show that these values are increasingly becoming mainstream, rather than fringe.

LOHAS are likely to research a product or service online prior to purchase, and also more likely to read an internet web blog. They will trial products and services, and if these meet certain criteria that match the consumers' values the products and services will be adopted. LOHAS consumers exhibit strong loyalty to the products and services they adopt, perhaps because of the significant research and trialing they invest in to select business offerings, and become strong advocates for ones they like. They will educate others about products and services they support, and are regarded by their peers as trusted sources of information.

The interconnections between global economies, cultures, environments, and political systems plays a large role in the holistic worldview of the typical LOHAS consumer, but equally important are the interconnections of mind, body and spirit.

HEALTH

A state of complete physical, mental and social well-being and not merely the absence of disease or infirmity as defined by the World Health Organisation.

SUSTAINABILITY

Development that meets the needs of the present without compromising the ability of future generations to meet their own needs as defined by the World Commission on Environment and Development

SOLUTION SEEKERS - THE NEW ZEALAND LOHAS CONSUMER

Moxie Design Group has researched the New Zealand LOHAS market, and defined them as Solution Seekers.

Solution Seekers are very similar to LOHAS in other countries. It is important to Solution Seekers to be seen as mainstream consumers - to belong and be connected with others. For example, participants Moxie interviewed reported feeling out of place in specialty organic/health food shops, and would rather source their LOHAS type products at supermarkets.

This market consists of a growing number of people concerned about global issues and lifestyle pressures. These people feel responsible for the environmental and social problems associated with modern living.

Solution Seeker consumers are wanting more from businesses than good business behaviour. They expect business to share their concerns about world issues and they are seeking products and services that support their values.

CULTURAL CREATIVES

Cultural Creatives was a term coined in the mid 1990's by sociologist Paul H. Ray and psychologist Sherry Ruth Anderson to describe a large segment that has emerged in United States society. The concept was presented in 2000 in their book *The Cultural Creatives: How 50 Million People Are Changing the World*. The panel's extensive research showed that nearly 25% of the US population identified as a Cultural Creative, meaning they identified with the concepts of health, sustainability and social justice being important issues that affected how they lived their lives.

Ray described this group as innovators and leaders of cultural change. He saw they were major drivers of consumption, while being disenchanted with materialism and hedonism. They were defined as educated consumers, who made conscientious purchasing and investing decisions based on social and cultural values.

ETHICAL CONSUMERS

Ethical consumerism refers to buying things that are made ethically. Generally this means without harm to or exploitation of humans, animals or the natural environment.

This can take the following forms:

- Positive buying — favouring ethical products and businesses that operate on principles based on benefit for the greater good rather than self-interest.
- Moral boycott – avoidance of particular products, services and companies that are deemed to follow unethical practices.

CONSUMERS WHO CARE

In New Zealand Nick Jones and Associates has developed the unique 'Consumer who Cares' research, which was previously known as "Good is Gold". It is licensed from Nielsen Media Research and tracks how consumers respond to Corporate Social Responsibility and Sustainability programmes plus how they support Non-Profits.

Nearly 2.2 million New Zealanders think more highly of companies that support charities or worthy causes. They are part of a growing global trend that is seeing consumers taking an increasing interest in how companies behave socially, environmentally and culturally.

LOVS - LIFESTYLE OF VOLUNTARY SIMPLICITY

Simple living (or voluntary simplicity) is a lifestyle in which individuals consciously choose to minimize the 'more-is-better' pursuit of wealth and consumption. Adherents choose simple living for a variety of reasons, including spirituality, health, increase in 'quality time' for family and friends, stress reduction, conservation, social justice or anti-consumerism, while others choose to live more simply for reasons of personal taste or personal economy.

Overview

In 2000, Natural Business Communications and The Natural Marketing Institute partnered in groundbreaking research which identified a new, and rapidly growing \$546 billion annual global market which they dubbed the “Lifestyles of Health and Sustainability”.

A new and growing conscientious market has emerged worth in excess of US\$550 billion annually. This market is characterised by values driven consumers. They tend to be sympathetic of environmental issues and social justice, spiritually aware and show empathy towards the plight of others. One of the key characteristics of this group is their tendency to make consumer decisions, at least in part, on the basis of these ethical considerations.

These consumers are known by many names across the globe, but all share a common set of values around health and sustainability.

LOHAS is rapidly becoming the commonly used acronym to describe the market place for these types of products and services and the customers who shop in them.

These markets include organic and natural food and beverages, energy efficient appliances, eco-furnishings, non-toxic toys, lifestyle publications, clothing, self help tapes, spiritual activities, health and fitness supplements, eco-tourism, spas, health and sustainability events, music and arts, green energy, clean-tech, carbon offsetting, public and alternative transport, hybrid and low-energy transport solutions, green building, double glazing, low-allergy paints, socially responsible investment, green home loans etc.

The values of these consumers are increasingly becoming mainstream throughout the world.

LOHAS Consumers

LOHAS consumers make choices that reflect their desire for a more meaningful, healthy and sustainable existence. They are environmentally and socially aware and consider the welfare of themselves, their communities and the planet.

They are conscious that their consumer decisions have implications and can contribute to larger social and environmental outcomes.

Their choices are increasingly driven by the lifestyle they want to live. They seek to engage with companies that support their way-of-life needs and wants, and share their values and beliefs.

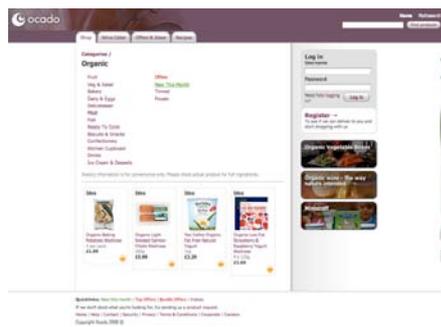
They come from all walks of life and defy typical demographic stereotypes of income, education and location.

LOHAS Companies

Business and industry are responding to consumer and government demand for greater levels of transparency and accountability in their business operations. Some are also recognising the opportunity these new trends are uncovering.

Companies practicing 'green capitalism' are providing products and services that support positive economic, social and environmental outcomes. This is more than merely managing current social and environmental risks, but actually supplying product and service solutions that LOHAS consumers can purchase and use.

These companies range across the full spectrum of organisational sizes, industries and sectors.



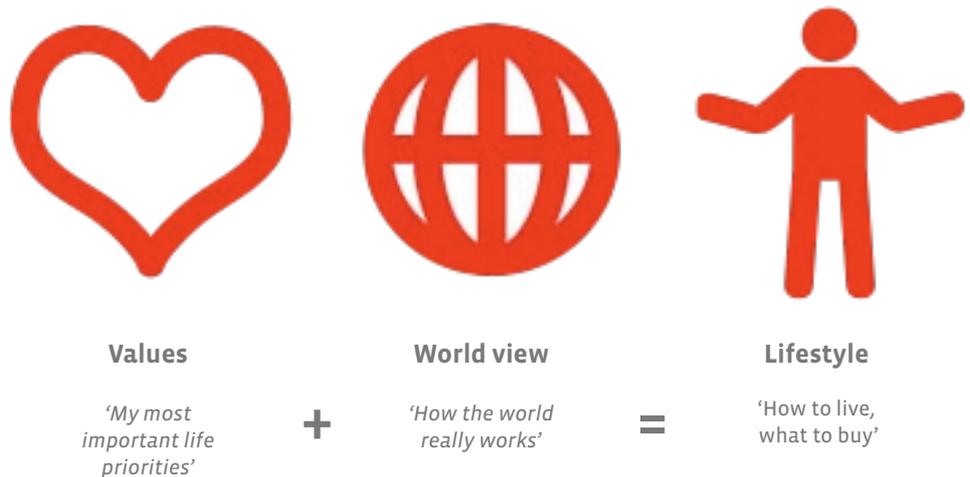
LOHAS consumers

The simplest definition of LOHAS consumers is that they share a common set of individual, social and environmental values. These values, coupled with their view of how the world works, determine the type of lifestyle decisions and consumption choices they make.

They have deep-seated values based on a fundamental concern about health and sustainability, at an individual, social and environmental level. They believe we should all make decisions and take responsibility for their impacts and implications on the wider community and environment.

They are making a conscious decision to live differently, review and restructure their lives based on what is important and meaningful. It is impacting the day to day choices they make about the products and services that they choose to consume.

They are highly conscious and strong advocates for brands that share their world views.



Adapted from a presentation by Paul H. Ray

Things to know about LOHAS consumers

MAINSTREAM

They are a diverse consumer group, spread widely across the demographic spectrum and although their views may be perceived as fringe and 'green', that isn't how they would choose to be seen. They don't consider themselves as 'greens' and prefer to see themselves as mainstream consumers trying to make better decisions at a practical day to day level.

VALUES AND ATTITUDES, NOT DEMOGRAPHICS

Traditional demographic approaches to these consumers do not work - they come from all walks of life. These consumers are defined by their values and attitudes towards health and sustainability, and the degree to which they demonstrate these values through their actions.

TRANSPARENCY AND AUTHENTICITY

They are smart, informed and technologically savvy. They crave information so that they can make informed choices. They actively search for products and services they can connect with, using modern channels such as the internet.

They require authenticity from brands. They understand when they are being targeted by brands and marketers, and are sceptical of marketing hype.

BUSINESS ADVOCACY

These consumers are strong advocates for products and services that work and match their values. They will educate others about the ones they like and support, and are regarded by their peers as trusted sources of information. They seek to form a relationship with the companies they buy from and want to affiliate themselves with organisations whose values resonate with their own.

PREMIUM SOLUTIONS

They are willing to pay more for sustainable products and services but this is determined by a number of other factors including traditional attributes such as quality and availability etc plus the tangible (environmental and social) attributes the product or service provides them.

SHARED RESPONSIBILITY

They are looking to business and government to provide leadership in sustainability and health. They want assurance that their efforts in the market place will be supported by business and government - that their actions are not in vain and will make a positive difference.

NEW WAYS OF LIVING

They are changing their consumption patterns to reflect their lifestyle choices. They are replacing traditional consumption with new social and environmental engagements as a way of providing meaning to their lives. As a result they are making less frivolous choices and instead buying fewer but better quality and more enduring products and services.



International overview

LOHAS consumers aren't defined by just economic stereotypes. Their ability to engage is based more on having achieved a certain level of comfort in their lives combined with a need to consider the wider issues and make a contribution to the greater good.

LOHAS research has now been undertaken and measured in the United States of America, Belgium, France, Germany, Italy, Netherlands, Portugal, Spain, United Kingdom, Australia and Japan.

MORE THAN A DEVELOPED WORLD TREND

In addition, there is anecdotal evidence that a number of other countries have been identified that contain LOHAS consumers and markets. These include China and South Korea, South East Asia, Brazil and India.

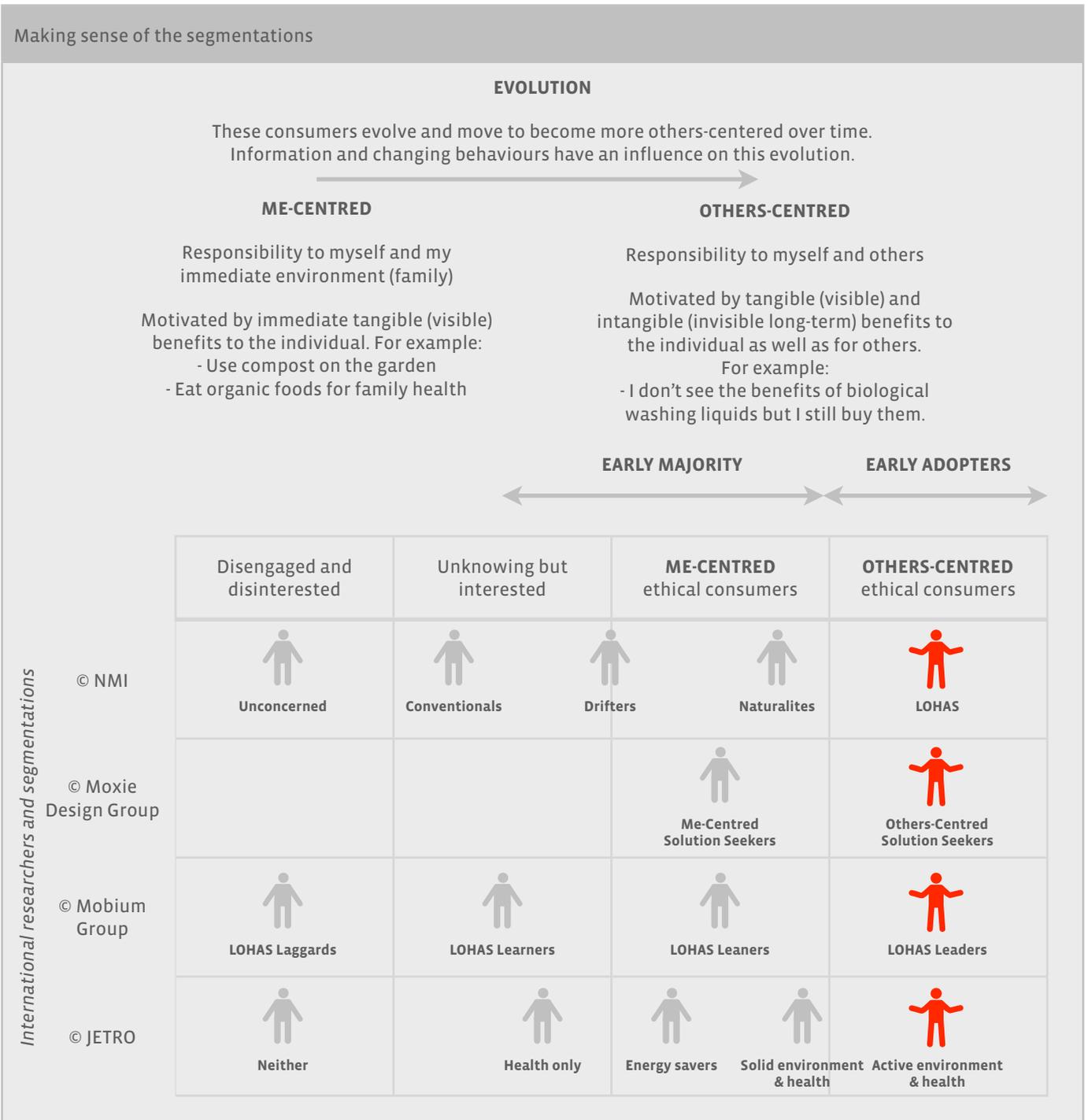
Where LOHAS have been identified globally



Scale and comparison

LOHAS consumer values, attitudes and behaviours tend to evolve over time.

They move from making more immediate me-centered decisions to more future focused others-centered decisions as their experience, understanding and ability to engage increases. This me-centered / others-centered scale provides a way to make sense of the different segmentation methods undertaken globally.



International perspectives

AUSTRALIA

25% of Australian adults hold strong values about the health and well-being of themselves, their family and also the community and planet at large. And nearly 4 million Australians consciously make consumption decisions based on these concerns and values.

Many are willing to pay a premium for environmental products and services, and they are also passionate advocates for companies that support their values.

© Mobium Group - Living LOHAS Report 2007

BELGIUM

Belgium has embraced the LOHAS values and behaviours with 24% of the population being either LOHAS or 25% being Naturalites (i.e. people focused on their own personal health and well-being. Although interested in environmental issues, they are less likely to be driven to purchase based on these issues alone). One of the defining characteristics of Belgium LOHAS is their commitment to altering behaviour to mitigate climate change issues. They are actively choosing products that are environmentally-friendly.

© NMI - European LOHAS Market 2007

CHINA

There is anecdotal evidence to suggest that LOHAS exist in mainland China. There have been a number of recent articles suggesting traditional Chinese values match LOHAS values. This has been further supported with the launch of a dedicated LOHAS website in China focusing on personal health and well-being.

www.lohas-china.com

FRANCE

France has one of the lowest percentage of LOHAS (15%) of all European countries, but in contrast it has by far the largest percentage of Naturalites (27%) This is a very traditional and cultural characteristic where buying local is motivated by the preservation of local custom and heritage.

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"Chinese culture is itself a LOHAS culture. For example, the Chinese emphasize the harmonious coexistence of man and nature which accords perfectly with the concept of LOHAS. However, this part of tradition has been gradually eroded by fast paced development and civilization. So, I think it's important to endorse Chinese traditional values when promoting LOHAS in China."

<http://english.cri.cn/4406/2008/01/25/1122@317621.htm>

GERMANY

In Germany, nearly 20% of the population have adopted the LOHAS lifestyle.

Green markets in Germany are viewed as commonsense and mainstream. Therefore Germans are less likely as a general population to evangelise the benefits of environmentally-friendly products. This makes the LOHAS group quite distinctive and they are seen as much more overtly green compared to the rest of the German population.

© NMI - European LOHAS Market 2007

ITALY

LOHAS ideals are fashionable in Italy. It has a large group of Drifters, or people that have good intentions about acting in environmentally and socially conscious ways, but their behaviour is influenced by other factors. LOHAS make up 15% of the country and are more concerned for the environment than their personal health and well-being.

Italians purchase more sustainable related products and services than the average European and they place more emphasis on efficiency and durability, rather than product recyclability etc.

© NMI - European LOHAS Market 2007

JAPAN

A large number of environmentally-friendly products and services are being distributed in response to an increasing awareness of environmental, food safety and health issues. A variety of media now use the LOHAS title to represent this new market.

<http://www.dentsu.com>

There are suggestions that that LOHAS consumers (22% of the population) are willing to spend up to three times as much on products and services that are in line with LOHAS than any other type of product. The study also pointed out that these consumers are very educated, and are making conscientious purchasing and investment decisions depending on the degree to which businesses demonstrate environmental and social responsibility.

Nikkei Research Institute of Industry and Markets

NETHERLANDS

The Netherlands' willingness to pay a premium and advocate on behalf of LOHAS values and products is noticeably less than other European countries. Environmental behaviour is driven more by the conventional views that see it as a means to reduce costs and improve efficiency rather than having a higher moral environmental purpose. LOHAS make up 17% of the overall population.

© NMI - European LOHAS Market 2007



A range of international LOHAS periodicals. China, Japan, Germany

95% of Japanese people believe that global warming is an imminent issue. The percentage was higher in older generations, according to a report released on August 10, 2007, by the Keizai Koho Center

(Japan Institute for Social and Economic Affairs)

PORTUGAL

The proportion of Portuguese LOHAS doesn't differ much in number (21%) to other European nations but their level of engagement is much higher. It has a very strong traditional base with the smaller more progressive sectors leading change away from environmental concerns within that society.

Portugal is the most active country when it comes to promoting LOHAS values and behaviours. With the exception of the Unconcerned (the environment or society aren't priorities), the Portuguese are passionately concerned about the environment and committed advocates.

© NMI - European LOHAS Market 2007

SPAIN

20% of the population in Spain has adopted LOHAS lifestyle and a further 23% have more 'me-centred' Naturalite tendencies. Spanish LOHAS are distinctive compared to other European consumers in their desire to learn and teach others about the environment.

Spaniards find it more important than others for companies to support the communities in which they work.

© NMI - European LOHAS Market 2007

TAIWAN

In Taiwan you can find LOHAS magazines, department stores and restaurants called LOHAS that sell LOHAS branded products. According to Toshi Ide of LOHAS Business Alliance in Japan there is anecdotal evidence indicating that LOHAS exist in Taiwan in large numbers (24%) similar to what has been cited for Japan.

UNITED KINGDOM

In the UK, 15% of the population has adopted a LOHAS lifestyle with a further 24% categorised as Naturalites. The UK has the highest percentage of Conventionals (no emotional 'green' attitude but they do participate in various environmental activities based on being sensible solutions) and one of the lowest percentage of LOHAS of all the European countries surveyed.

UK consumers appear less environmentally concerned but still highly engaged, with this behaviour being now entrenched within the cultural makeup of the country.

© NMI - European LOHAS Market 2007

UNITED STATES OF AMERICA

NMI have been producing the 'Understanding the USA LOHAS market' report for more than six years. In 2007 the number of LOHAS consumers stood at 19% or 40 million people with a further 19% considered Naturalites.

Over the past 3 years (2005 - 2007) the LOHAS group remained relatively static growing from 17% to 19% - what you would expect from the early adopters and early majority. The biggest changes have been the shrinking of the Unconcerned and Conventional groups (the two laggard segments) with a corresponding increase in the Drifters.

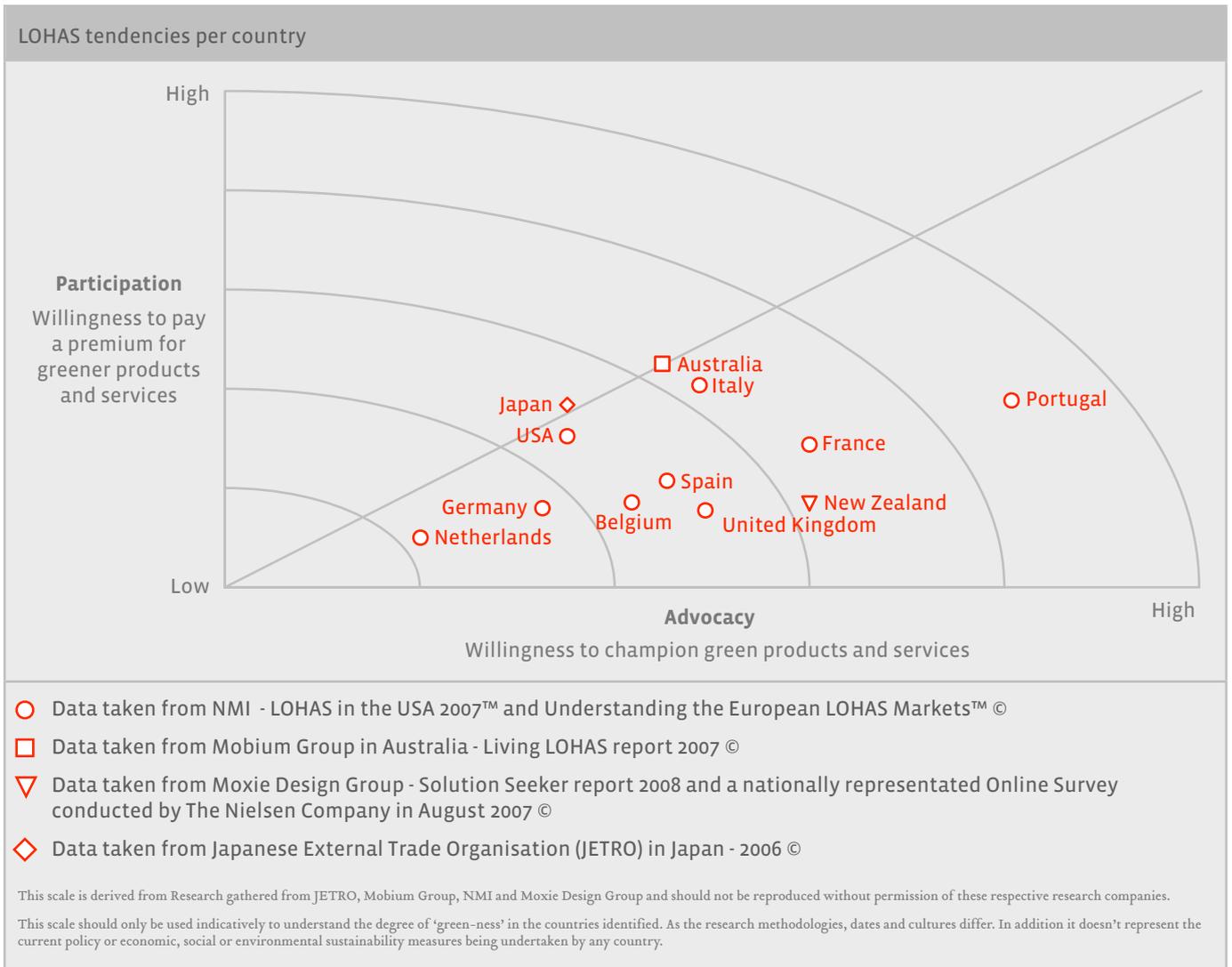
© NMI - Understanding the USA LOHAS Market Report 2007



www.bigbritain.com

Comparative scale

This scale is based on measuring the prevalence of two of the strongest LOHAS tendencies (product and service advocacy and willingness to pay a premium) in the general populations of the countries researched. The research provides a simple way to understand the differences between the general populations of these countries surveyed.



Valuing the market

The Worldwatch Institute's recently issued State of the World report 2008 claimed that climate change and other environmental problems are essentially stimulating a new sustainable global economy.

The report says that in 2006, almost US \$52 billion was invested in renewable energy, up 33 percent from 2005. In the same year, carbon trading reached almost US \$30 billion.

“Environmental problems are drastically rewriting the rules for business, investors and consumers, affecting over US \$100 billion in capital flows,”

*Gary Gardner and Thomas Prugh
Project co-directors*

Market valuation

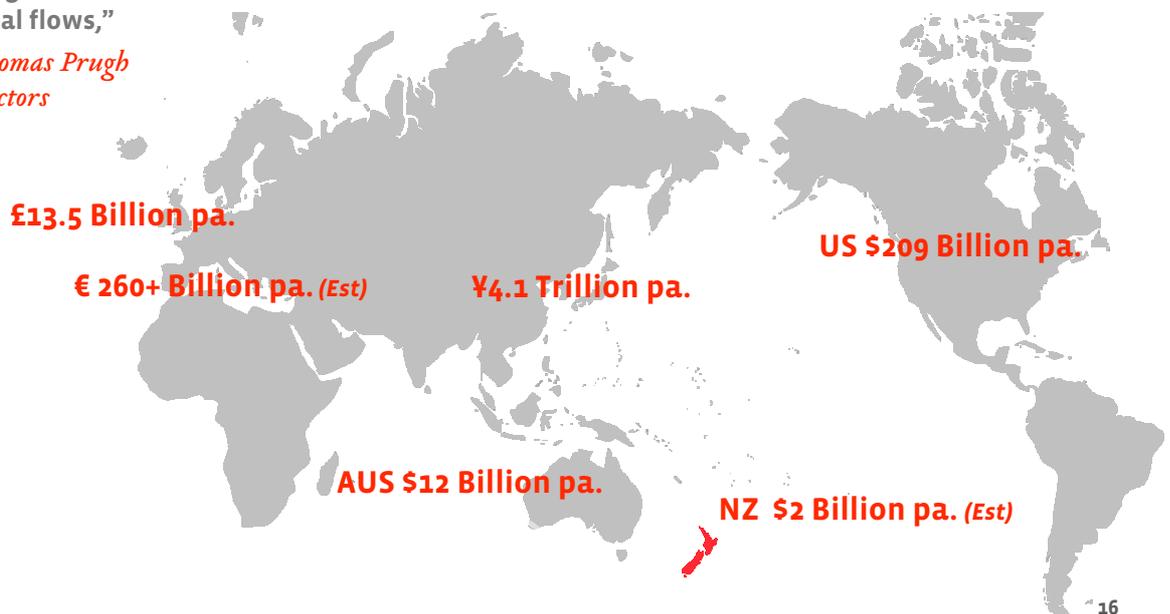
The LOHAS markets have been measured in Australia, the USA and further estimated in Europe and New Zealand.

In 2007 it was estimated to be worth AUS \$12 billion annually in Australia (Mobium Group), US \$209 billion annually (NMI) business to consumer market in the USA, ¥4.1 Trillion annually in 2001 in Japan (JETRO). As yet Western Europe hasn't been measured but based on the green market percentage relative to the overall economies of both Australia and the USA it has been conservatively estimated at €260 billion.

Moxie estimate the current market for LOHAS-type products and services in the New Zealand domestic market is NZ \$2 Billion. This figure is conservative, taking into account the size of the market and the overall economy.

GROWTH

LOHAS markets are projected to grow rapidly in the coming years, with most researchers agreeing that the markets are expected to double in size by 2010. Growth is being driven by a number of factors such as increased climate uncertainty, resource shortages and new product and service development.



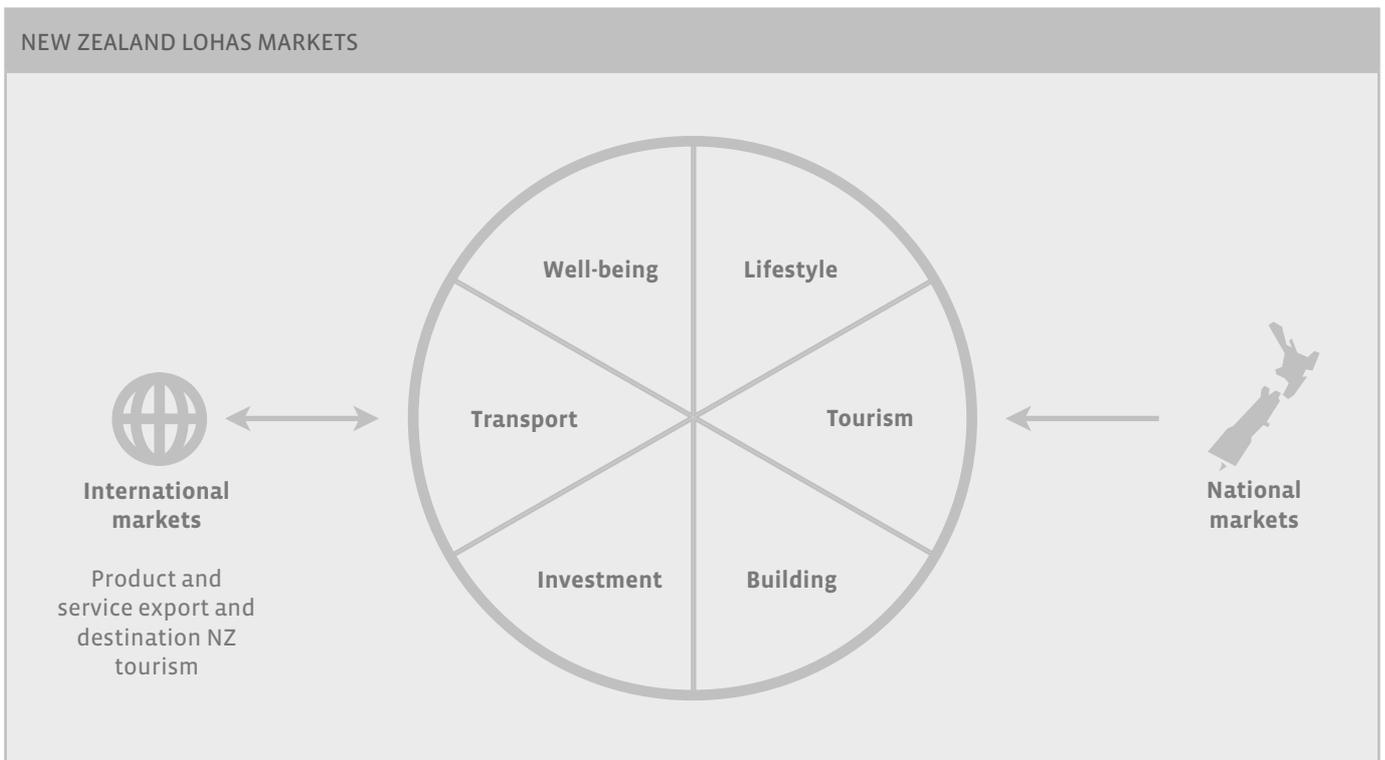
Market sectors

NEW ZEALAND VALUATION

The New Zealand market sectors were adapted from both the NMI and Mobium Group studies. The diagram below has been developed to make the sector model relevant to New Zealand business, based on both domestic and international perspectives. This has been done due to New Zealand's unique opportunity in exporting natural products and as an inbound tourist destination.

The online survey of 3,000 people found 63% buy 'environmentally-friendly' goods when doing their food shopping, with a similar number (60 per cent) swapping a 'normal' product for a green one each week

Newconsumer.com



Sectors

WELL-BEING

This sector comprises products and services such as organic and natural foods and beverages, vitamin and mineral supplements and 'free from' foods and beverages (e.g. sugar-free, gluten-free etc). It also includes alternative medical therapies, personal development books, DVDs and programmes, spiritual activities, health, fitness and supplements.

This is by far the biggest sector at a global level. This is because LOHAS consumers make a correlation between a healthy environment, body and mind.

LIFESTYLE

This sector comprises products and services such as homewares, natural cleaning products, magazines and publications, home gardening, energy efficient appliances, eco-furnishings, non-toxic toys, lifestyle publications, and clothing.

TOURISM

This sector comprises products and services such as slow travel, eco-tourism, spas, health and sustainability events, and music and arts events.

Many people are choosing to be close to nature on their holidays e.g. tramping, walking, enjoying the mountains, and going to the beach. When it comes to long distance air travel most people are looking for climate friendly solutions rather than limiting their options for local destinations.

TRANSPORT

This sector includes transport service systems, alternative fuel sources, public and alternative transport, and hybrid and low energy transport solutions.

BUILDING

This sector comprises alternative building products and practices (i.e. double-glazing, low-allergy paints), community living structures, home certification, energy star certification, flooring and systems and carbon offsetting services, private energy generation and personal energy solutions.

For a growing percentage of building buyers, occupants, and do-it-yourselfers, issues such as energy efficiency, indoor air quality and sustainability no longer represent minor components of the decision process - they are now increasingly core preferences for new homes and buildings.

INVESTMENT

This sector comprises products and services such as venture capital, socially responsible investment funds, green investment and green loans and mortgages.



*LOHAS suburbs,
Hong Kong*



*John Deere
is helping farmers harvest
energy by providing finance
and support*

Key considerations for businesses targeting LOHAS consumers

LOHAS consumers are a global driver for sustainability and a transition to a sustainable economy. They are a measurable and growing consumer group and their numbers have been measured in the millions across Europe, USA, Asia, Australia and recognised in other parts of the globe.

They are defined by their attributes and values, not demographic profiles. It's important to realise that they aren't a fringe green market but as the leaders of a growing mainstream consciousness buying with their hearts and minds.

They are solutions focused and information hungry using modern communications channels to search, source and vet their decisions. They have a heightened awareness for green brand and marketing claims, but with the levels of misinformation and half truths in these claims they are very sceptical. Personal endorsements and third party accreditation are increasingly important. As is providing sufficient information that provides credibility and a level of comfort in decision making.

They are also realists and understand that at times the information can be overwhelming and at times contradictory. This doesn't mean they are prepared to do without, but they are prepared to settle for what they think is the best solution available at the time.

They are much more willing than the general population (in any country surveyed) to pay a premium. But this premium is built on more than just values alignment and improving environmental and social performance. It is also based on attributes and benefits that empower them as individuals to make a difference and live the way that they want.

They are prepared to drop existing brands to trial others that match their values and lifestyle needs. If the new product or service meets their expectations they become staunch advocates and champion the new product with others.

They may be the early adopters in green markets but they are aware they alone cannot navigate a course towards a green economy. They are still looking for leadership and innovative solutions from business.

Recommendations

1. Target LOHAS as early adopters

LOHAS and Naturalites are the early adopters of sustainable products and services. Target them, allow them to engage and they will become staunch brand ambassadors.

2. Create personal 'premium' solutions

In environmentally aware nations, Corporate Social Responsibility, ethical principles and increased environmental efficiency is no longer a point of difference but an expectation.

In future there will greater demand for solutions that empower LOHAS consumers to engage in the sustainability of their world.

The future of green premiums lie in sustainable innovation that provides the solutions that puts this group in control and feeling better about the decisions they are making.

3. Reinforce current perceptions through contribution

LOHAS see social and environmental health connected to their own personal health and wellbeing. Because New Zealand is perceived as a LOHAS country, it's increasingly important for New Zealand businesses to speak about their own contribution in protecting New Zealand culture and environment. This reinforces current perceptions and allows others to participate in the protection of brand New Zealand.

4. Communicate corporate responsibility

Environmental friendliness of companies increases the likelihood of purchase. Coupled with over 50% of the general population interested in learning more about how to protect the environment, there is a real opportunity to connect New Zealand sustainable business practices with the market demand for greater knowledge.

In both the US and Europe 58% of the general population state that the environmental friendliness of companies increases the likelihood of purchase.

NMI US and European research

It is increasingly important that New Zealand businesses improve their sustainability practices and proactively communicate this activity to world markets.



Flexicar share system



*Green retail energy options
Australia*

5. Learn and leapfrog.

Information about new ideas, new ways of living and sustainable solutions is proliferating globally. Businesses can learn from the best internationally and bring together a number of best practice approaches. Implement them simultaneously to potentially leap-frog the competition.

6. Build brand transparency

With concern over the authenticity of green claims, consumers are increasingly checking the credibility of products and services first hand, resulting in greater trust of small accessible brands over their large global competitors. Independent accreditation, supply chain traceability and online communities will become increasingly important in telling and delivering authenticity with consumers in the future.



*Responsible tourist
booking agent*

Why should business care?

“We live in a world that is so thoroughly configured by human effort that design has become second nature, ever-present, inevitable, taken for granted.

And yet, the power of design to transform and affect every aspect of daily life is gaining widespread public awareness”.

Bruce Mau, Designer

Environmental and ethical performance is under scrutiny and business is responding with improvements in social and environmental accountability. LOHAS may not necessarily be attracted to you on the back of these changes and social programmes, but they will certainly choose avoid you over your competitors that do.

We also live in a time of unique challenge and opportunity. Sustainability as a practice has become a driver of innovation and equally, we can't innovate without it. As we re-imagine the future and create the new solutions to serve our needs, the forced redundancy of old solutions will increase at pace. LOHAS will become increasingly important as the test bed for proving new products and services and advocating for change.

They will remain the opinion leaders and influencers shaping the reputation of business. They need to be recognised and supported.

Researchers and sources

Information for the development of this summary and report has been sourced from a wide range of international researchers and published papers from New Zealand and throughout the world.

SPECIAL ACKNOWLEDGMENT

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LOHAS



