

# The Future of Household Care Consumer Trends in Australia

<https://marketpublishers.com/r/F3F7C8B3DF2EN.html>

Date: May 2011

Pages: 134

Price: US\$ 3,450.00 (Single User License)

ID: F3F7C8B3DF2EN

## Abstracts

### Introduction

Understanding the most important trends impacting Australian consumers requires a broader understanding of the macro environment forces that have affected Australia in recent years. This report outlines how these social drivers translate into distinct attitudinal and behavioral shifts among Australian consumers with respect to household care shopping and consumption.

### Features and benefits

Identify the five most important consumer developments occurring in Australia, and understand how these affect consumers' household care choices

Gain an in-depth understanding of the broader socio-demographic, economic and technological forces shaping Australian consumer behavior

Benefit from Australia-focused consumer insight, benchmarked against global sentiment, to cater for contextualized, region-specific information needs

### Highlights

Nearly one-quarter of Australians will be over 65 by 2050. Addressing population aging requires rethinking of all aspects of a company's marketing strategy—from product design to promotion. Companies need to take a proactive approach to addressing this historically undervalued segment, in order to capitalize on rapidly shifting demographic

trends.

Over four-in-10 Australians find shopping enjoyable, but almost the same proportion think there is too much product choice when shopping. Retailers can reconcile this paradox by competing on non-price characteristics such as customer service and in-store layout, to ensure the shopping experience is interesting and engaging for Australians.

Less than half of Australians believe natural household cleaning products are as effective as non-natural offerings. Manufacturers of natural products need to be doing more to convince consumers that the science of natural formulation does not mean a compromise.

### **Your key questions answered**

How do Australian consumers define 'value-for-money' and how have value orientations changed in recent years?

How are Australians using the internet to make household care choices? What influence is improving connectivity exerting on Australian lifestyles?

How will private label household care products fare now that the economic downturn is effectively over? What do Australians think about private label?

What are the most influential claims guiding Australians' household care choices? How do these relate to more general attitudes towards the home?

What are the latest products and brands that are effectively addressing the needs of Australian household care consumers?

## Contents

### OVERVIEW

Catalyst  
Summary

### THE FUTURE DECODED

Trend: the socio-demographic profile of Australia is rapidly changing

The over 30 (million) crowd: Australia's growing and graying population holds greater "cultural capital"

Australia's household composition is a microcosm of wider demographic changes taking place in the country

Ethnic diversity will shape Australia's FMCG and retail landscape

Key take-outs and implications: understanding Australia's changing socio-demographic profile is imperative in addressing and anticipating key consumer needs

Trend: major challenges still confront post-downturn Australia

Australia leads the developed world in emerging from the downturn

Australian consumer confidence has rebounded compared to one year ago, but underlying caution remains

Australians are particularly sensitive to rising grocery prices

Key take-outs and implications: Australians are cautiously optimistic about their economic prospects for the future

Trend: many issues of global relevance are influencing Australian values

Australians exhibit a great deal of pride in their country

Australians are tackling numerous health issues with varying degrees of urgency

Australians are making greater efforts to reduce their impact on the environment

Key take-outs and implications: it is important to understand how Australians' values are changing in order to effectively resonate with consumers

Insight: the Australian retail sector is being shaped by shifting consumer expectations

New retail players have made little headway in dissolving the Coles and Woolworths duopoly

Australian grocery shoppers are becoming increasingly demanding of retailers

Private label momentum will continue to strengthen the position of grocery chains

Key take-outs and implications: household care retailers need to keep up with increasingly demanding Australian shoppers

Insight: cleaning for results: health-conscious Australians expect household care products to deliver on their promises

Household cleaning is primarily associated with health and hygiene  
Australians are adopting different strategies to ensure efficacy in household care products

Concerns about product efficacy can be linked to the skepticism that Australians harbor with respect to household cleaning product claims

Key take-outs and implications: household care products need to deliver on their promises to satisfy health-conscious and often cynical consumers

Insight: cleaning for less: staunch value-consciousness among Australians will continue to endure in the post-downturn environment

The thrill (and necessity) of the bargain hunt continues to entice Australian consumers

Private label products continue to grow "share of wallet" from value-conscious Australians

Australians are going online to find the best deals

Key take-outs and implications: industry players must enhance their value proposition and in doing so acknowledge that value is an individually defined concept that extends beyond low prices

Insight: cleaning for the planet: Australians are increasingly considering the ethical and environmental implications of the household care products they purchase

Australians pay particular attention to the environmental credentials of household care products

Growth in the organic and natural household care market in Australia reflects the joint effect of environmentalism and health in directing consumer choices

For Australians, good things come in less packaging

Australians want companies to be more accountable for their environmental impact

Many factors impede larger-scale adoption of ethical and sustainable household care products

Key take-outs and implications: Australians are holding household care product manufacturers to higher scrutiny with respect to ethical and environmental responsibility

Insight: cleaning for convenience: growing demands on time are influencing Australians' household care product choices

Time-poor Australians seek to minimize the amount of time they spend cleaning the house

Products that simplify the task of cleaning are highly valued by Australian consumers

Time-poor Australians are seeking a more efficient shopping experience

Key take-outs and implications: Australian consumers are looking for products and services that reduce the time and effort required to clean the home

Insight: cleaning for wellbeing: Australians appreciate the "feel-good" factor associated with cleaning the home

Australians acknowledge the profound emotional benefits associated with household cleaning

Many Australians became more emotionally invested in their homes following the economic downturn

Sensory benefits are not a direct purchase influencer for Australian consumers

Key take-outs and implications: industry players must acknowledge that household cleaning can have profound emotional value for consumers

Action: adopt a progressive but pragmatic approach to capitalizing on these Australian household care trends

Brands to watch: Coles Green Choice

Brands to watch: Method

Brands to watch: This Works

Campaign to watch: P&G Future Friendly

Best in class: Seventh Generation

## **APPENDIX**

Report methodology

Further reading and references

Ask the analyst

Datamonitor consulting

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