

# The Future of Personal Care Consumer Trends in Australia

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## 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 personal care shopping and consumption.

### Features and benefits

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

Access multiple waves of primary research to increase the likelihood of being 'on-trend' with NPD and marketing in Australia

Identify the companies, brands and campaigns most likely to succeed in the Australian market in the near future, and adapt strategies accordingly

## 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. Over half of all Australians express concern about personal care products that have been tested on animals. As more is learnt and publicized about how personal care products are made and distributed, products with a strong ethical positioning will be a key differentiator in the coming years.

## 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 personal care choices? What influence is improving connectivity exerting on Australian lifestyles?

How will private label grooming 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' personal care choices? How do these relate to more general beauty and appearance outlooks?

What are the latest products and brands that are effectively addressing the needs of Australian personal 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

Stirring the "melting pot": Australian views on multiculturalism are polarized

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

Mortgage envy: home ownership is becoming more elusive for young Australians

Australians are particularly sensitive to rising grocery prices

Australia's labor market has fared comparatively well amid the downturn but needs to address the aging population and gender wage disparity

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

The institution of family is a defining characteristic of Australian culture. Despite changing household types and family structures, the notion of family is an enduring one, and Australians continue to look to their families for stability, values, emotional and financial support, and a sense of belonging. This was particularly the case during the economic downturn, as consumers sought comfort in their personal relationships, prompting Australians to re-prioritize this aspect of their lives. Family is as important as ever in Australian life, not only for comfort and financial support, but also for advice on everyday decisions, particularly as consumers become increasingly cynical about corporations' marketing efforts. Acknowledging the importance of family to Australians helps elucidate the strong influence that family and friends have on consumers'

purchase choices.

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

TREND: Australians will rely more on the internet as mainstream media loses credibility and relevance

Australians are demonstrating growing distrust of mainstream media and advertising

Consumers are overloaded with advertising messages each day, with the

degree of marketing saturation negatively affecting consumers' attitudes toward the

advertising industry. In 2010, three-quarters (75%) of Australians said they "tend to

agree" or "strongly agree" that there is too much advertising today. The proportion was

slightly lower compared to 2008 (79%) but a considerable majority nonetheless. The

broad appeal of judging and criticizing the advertising industry has even been turned

into a successful Australian television show, *The Gruen Transfer*, which aims to

deconstruct various advertising campaigns and assess them on their merits (or lack of).

The internet will continue to facilitate Australian lifestyles

Key take-outs and implications: Australians are increasingly cynical of the media and

advertising, and will rely more on connective technologies to influence their

consumption choices

INSIGHT: The Australian retail sector is being shaped by shifting consumer

expectations

The health and beauty retail sector in Australia is becoming increasingly competitive

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: health and beauty retailers need to keep up with

increasingly demanding Australian shoppers

INSIGHT: Grooming for success: Image conscious Australians derive satisfaction from

knowing they look good

Physical appearance is a key concern for Australian consumers

Actual and behavioral demographic shifts will impact the personal care sector in

Australia

Key take-outs and implications: industry players should acknowledge the profound and

evolving role that personal care products play in Australians' lives

INSIGHT: Grooming for results: Australians expect health and beauty products to

deliver on their promises

Australians are primarily concerned about health and beauty products living up to their

promises

Concerns about product efficacy can be linked to the skepticism that Australians harbor

with respect to health and beauty claims

The need for product efficacy is all the more significant given Australians' time scarcity

Key take-outs and implications: Health and beauty products need to deliver on their promises to satisfy cynical and time poor Australians

INSIGHT: Grooming for the planet: Australians are increasingly considering the ethical and environmental implications of the health and beauty products they purchase

Growth in the organic and natural personal care market in Australia reflects the confluence of environmentalism and health in directing consumer choices

Australians express concern about how personal care products are sourced, manufactured and tested

For Australians, good things come in less packaging

Australians want companies to be more accountable for their environmental impact

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

INSIGHT: Grooming for less: staunch value consciousness among Australians will continue to endure post-downturn

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: Grooming for me: Australians often make health and beauty product choices based on their specific and individual needs

Customized products deliver a tailored grooming experience for Australians

Health and beauty products can be perceived as a personal treat or indulgence

Sensory benefits serve to enhance the grooming experience

Key take-outs and implications: industry players should acknowledge that the grooming experience is often as important as the outcome

ACTION: Adopt a progressive but pragmatic approach to capitalizing on these Australian personal care trends

Brands to watch: Hissyfit

Brands to watch: L'Oreal Paris Men Expert

Brands to watch: Outback Spirit Botanicals

Brands to watch: Cheffresh Skincare

Brands to watch: Macleans Iso-Active Whitening Foaming Gel

Brands to watch: Soap & Glory

## **APPENDIX**

Report methodology  
Further reading and references  
Ask the analyst  
Datamonitor consulting  
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