

Re

home retail

frame

# Welcome

In this report, we will be exploring the context, the pathways, and the positions that can transform customer hesitation into action.

## Context

We'll explore what's going on in the lives of consumers, both in and beyond the home, that is impacting their perceptions and actions in the home retail category.

## Pathways

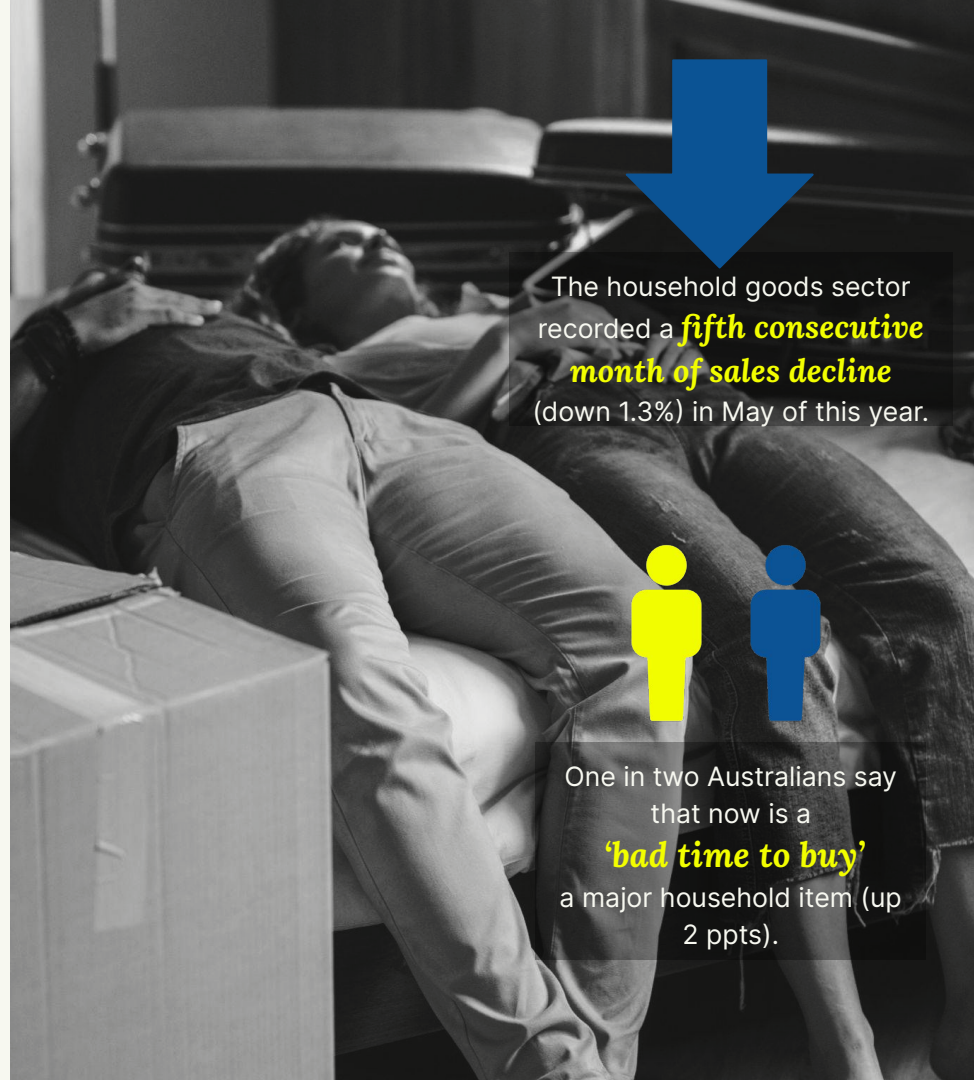
We will identify the three core strategies that home retail brands and retailers can use to transform customer hesitation into action, creating an unfair advantage.

## Postures

We will equip you with the language and tools needed to position your offerings as indispensable to consumers, thereby increasing the value of your product.

# The home retail category is facing a challenge

Amidst economic uncertainty, stagnating GDP and a growing sense of instability, consumer confidence is at a record low, **leading many to delay their home retail purchases.**



The household goods sector recorded a **fifth consecutive month of sales decline** (down 1.3%) in May of this year.



One in two Australians say that now is a **'bad time to buy'** a major household item (up 2 pts).

# But the home has never been *more important* to people

As times become more challenging, people are seeking a greater sense of comfort and spending more time at home. With this the role of our home as a space of safety becomes more important.



## 85%

Of Australians say their  
*homes are a sanctuary*  
from the outside world's  
demands









Today, our home, and more importantly the contents of it, plays a *critical role in shaping our daily experiences and well-being.*



Now is the time to turn hesitation into action.



To do this, we need to  
*reframe* how we *think* and  
*talk* about home retail.

By redefining the value proposition, brands can align products with the evolving needs and aspirations of consumers. This work aims to provide the language and tools to position your product as is an essential investment, building and unfair advantage in order to drive growth.



Three *pathways* to drive conversion now

1.

## Alleviate Burdens

Help people to face their burdens and challenges head on. Don't shy away from the negative but position home retail items as a way to overcome these obstacles.

2.

## Reimagine the Sanctuary

Redefine the home as a sanctuary. Products that create a space for optimisation, as well as a desperately needed source of solace.

3.

## Showcase Successes

Highlight the value of showcasing personal success, catering to the desire for self expression, social recognition and aspirational living.

Pathway 1

*Alleviate*

*Burdens*

Help people to face their burdens and challenges head on. Don't shy away from the negative but position home retail items as a way to overcome these obstacles.

# Demands on our time and energy have intensified.

In a world marked by the lingering effects of COVID-19 lockdowns, economic and societal pressures, and shifting family dynamics, many Australians are facing challenges and feeling overwhelmed.







## Economic pressures

Economic challenges, including cost of living and housing crises, add to the sense of burden people feel.

- **65%** of people are very/extremely **concerned about the cost of living**
- **64%** of renters are very/extremely **concerned about rental costs and availability**



## Societal pressures

Life is under the microscope, expectations from society about the 'right' way to parent and the need to keep up appearances both on and offline.

- **1 in 3** feel **judged by others** about their life choices
- **2 in 5** rarely **have enough time** to do the things that matter to them



## Living pressures

For many, homes now serve multiple functions (workspace, schoolroom, etc.), exacerbating its demands.

- **1 in 3** (32%) Say they regularly **work from home**
- **335K** households in Australia are **multi-generational** with smaller spaces doing more.

# Our homes themselves are not without their own challenges

Despite the positive sentiment, our home comes with its own demands and burdens. In particular the time and effort spent on maintenance and household chores like cleaning, washing and tidying.



## 2in3

Say that *maintaining their home* places demands on their time and energy.

*"After having kids I felt like I was trapped to my household chores. The time it takes to wash, hang, dry and fold washing for 5-6 people used to make me feel like **I was drowning.**"*

Female, 35-44, NSW, Family

To alleviate burdens, brands can  
*adopt the posture* of either...



## A Lifesaver

Reframing products as heros, not  
just a tool.



## A Switch On

Reframing products as vital resources to  
prepare and energize.

The posture of



# A Lifesaver



To do this, identify where and why people are struggling, and position your product as the solution. Reframe your product as a hero, not just a tool.



# Home retail needs to make everyday tasks easier, reducing the strain of domestic chores and acting as an indispensable partner in the home

## Look for people who say

- I need help to, or I'm struggling with...
- Make my life easier
- I want to do things quicker or easier
- Ease the strain of physical tasks
- Streamline the process

## Describe the product as

- Reliable/Functional/ practical
- Convenient
- Efficient
- Simple/ User friendly
- Modern/ smart
- High performance

## Key product attributes to dial up:

**Easy to use, clean or store**

**Low maintenance/ easy to maintain**

**Saves time/does things quicker**

**Energy efficient**

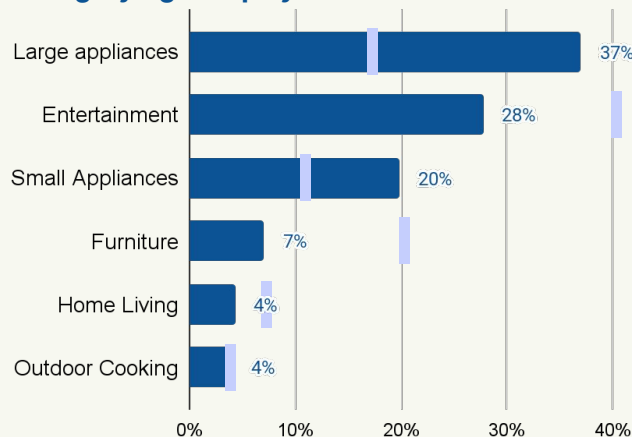
Durable and long lasting

**Multi functional or smart features**

Quiet

**Set and forget/ works on it's own**

## Category right to play



**Bold text** = significantly above average    =Average

**Source:** GIC xTRA Reframe Home

**Base:** n= 2034





What this looks like for people today



## Robo-mop

"The free time I would have from not needing to vacuum or mop my house every day or two would be **life changing.**"

Female, 35-44, NSW, Family



## Wifi Washing Machine

"Since having this life has been easier, I used to be back and forth checking the old machine now with the wifi function I put my load in, go make the beds, even relax with another coffee til my phone alerts. Aside from my degenerative back disease I need hip replacements so **anything that helps** carry heavy washing baskets & with less stairs **is a God send** to me."

Female, 55+, QLD, Multi-gen



## Airfryer

"I feel happy I can save time and effort using it, **I feel invincible** in that I can cook any dish I like and I feel supported with this appliance in that I can wash up easily."

18-34, Female, NSW, SINK

The posture of



# A Switch On



To do this, products need to help people prepare to face the world, both physically and emotionally. Reframe products to armour-up in preparation and energize people to be at their best.



Home retail needs to help people prepare for the day ahead, perform at their best and smooth the transition from inside to outside.

#### Look for people who say

- I need to get ready to face the world
- Look and feel my best
- To boost my energy.
- I want to feel prepared
- Ease into the day/ start the day right

#### Describe the product as

- Functional/ practical
- Convenient
- Reliable
- Efficient
- Simple/ User friendly
- Healthy

#### Key product attributes to dial up:

Easy to use, clean or store

Durable and long lasting

**Made of high quality materials**

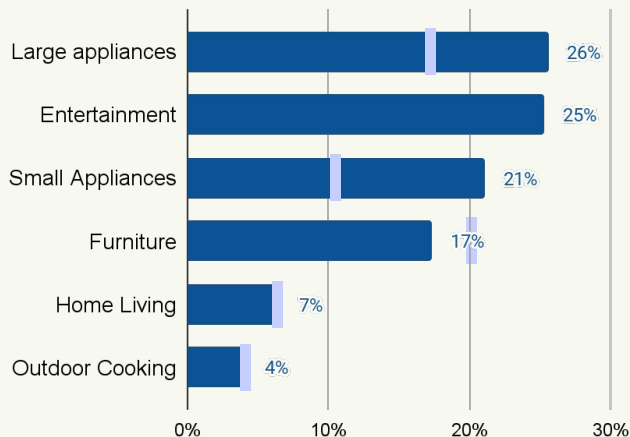
**Health benefits**

Energy efficient/ environmentally friendly

Multifunctional

Smart features

#### Category right to play



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What this looks like for people today



## Coffee Machine

"My coffee machine makes me feel like I can **conquer the world** on the nights I have barely slept. It brings me utmost joy and I really look forward to using it when I wake up"

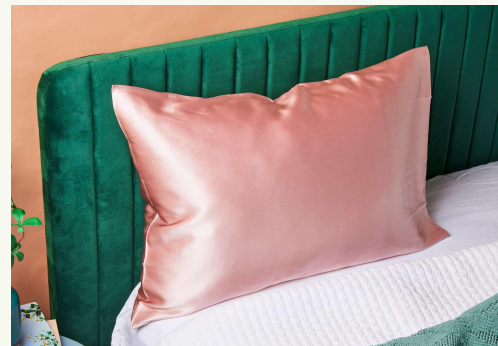
Female, 35-44, NSW, Family



## Smart TV

"Makes me rested and ready to tackle the rest of my day, with a **positive mindset** to go with it. If the kids have meltdowns and I can relate to them better with **love and confidence** and not be a stressed out mother."

Female, 35-44, QLD, Family



## Silk Pillowcase

"Without this wonderful item, both my skincare and haircare would go down the drain - as would my **self-esteem!!!** I would miss my short morning routine where my hair was knotless and soft without brushing and my skin was pimple-less and soft."

18-34, Female, VIC, DINK

Pathway

2

*Reimagine*

*the  
sanctuary*

Redefine our home as a sanctuary. Products that create a space for optimisation, as well as a desperately needed source of solace.



# The role of our home as a sanctuary is both vital and evolving.

After extended periods of lockdown during COVID-19, the role of our homes as safe havens was reappraised. Today, they have become a vital sanctuary, pivotal for work, relaxation, and social interaction. Amid ongoing challenges, the home and its contents help to shape daily experiences and well-being.



# The role of sanctuary is more than just escape.

The role of our home as a sanctuary and safe haven is increasingly important. But more than just an escape from the world, the sanctuary is a place to find comfort, a place to be yourself and to pursue passions, and feel a sense of joy.



# 87%

Say yes that they  
*“enjoy spending  
time at home”*

## Top positive aspects of the home

81%	Comfort and relaxation
73%	Safety and security
72%	Privacy and personal space
53%	Family and bonding
41%	Escape from work and stress



To reimagine the sanctuary, brands can  
*adopt the posture* of either...



## A Life Coach

Reframing products as facilitators of  
peoples' goals, passions or interests.



## A Switch Off

Reframing products as a way to restore  
energy and mental well-being.

The posture of



# A Life Coach



To do this, brands needs to enable people to zero-in on their priorities, applying their limited resources on not only making their lives easier, but making them better. Reframe products as a support for peoples' goals, passions or interests.



Home retail needs to play an **active** **role** in supporting people's goals, passions, and interests, providing **access to the things they love.**

#### Look for people who say

- I want be motivated/inspired
- I want to reach a personal goal
- I want to focus on....
- It's for my hobby
- I'm trying to do more of this/ be better at that

#### Describe the product as

- Functional/ practical
- Reliable
- Convenient
- Modern/ Innovative/Advanced
- User friendly
- Fun

#### Key product attributes to dial up:

**Fun and entertaining**  
**Innovative technology**

Multi functional

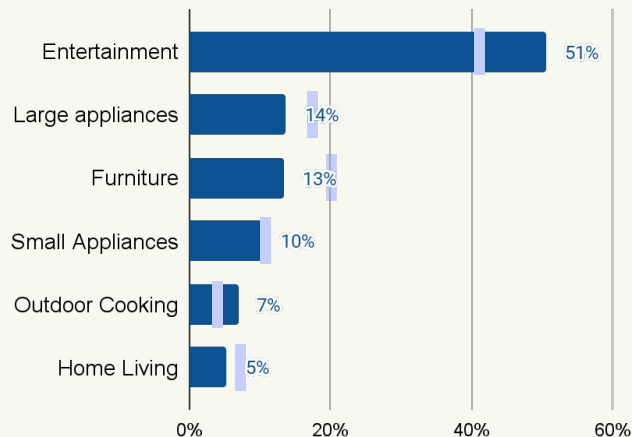
**Personalised to me/ my needs**

**Supports my goals**

**Unique/ stands out**

Easy to use, clean or store

#### Category right to play



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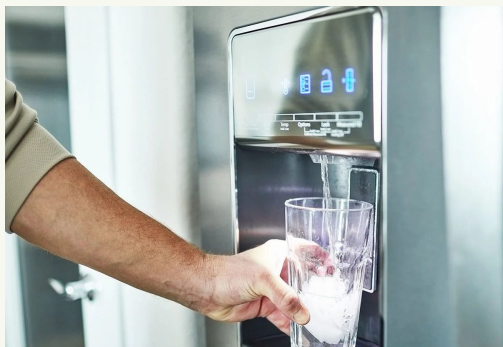
**Source:** GICxTRA Reframe Home

**Base:**n= 2034





What this looks like for people today



## Refrigerator

"The fact that my water consumption and health has noticeably increased over the time that I've had [the fridge] speaks volumes that **certain products can change you for the better.**"

Male, 35-44, NSW, Family



## Coffee Table

"The coffee table is **our meeting place**, we use it to play games on, we sit around it and talk about our day, it has **helped us to engage with each other**. [It has] made life more enjoyable far beyond what they are designed for."

Female, 35-44, VIC, Family



## Pellet Smoker

"There is value in this beyond the price as it creates a togetherness. It is designed for sharing with friends and that is **life enriching.**"

55+, Male, SA, Empty Nester

The posture of



# A Switch Off



To do this, brands need to provide comfort, enable escape, and facilitate rejuvenation. Reframe products to recharge energy, providing joy and relaxation in equal measure.



Home retail needs to create a **safe, restful and joyful** space within the home, helping people to restore their energy and mental well-being.

#### Look for people who say

- I want to let go of the tension
- Recharge my batteries.
- Relax and unwind
- Feel safe and secure
- Switch-off, disconnecting, escaping to another world.

#### Describe the product as

- Comfortable or soft
- User friendly
- Fun and engaging
- Smart
- Soothing

#### Key product attributes to dial up:

**Comfortable**

**Fun and entertaining**

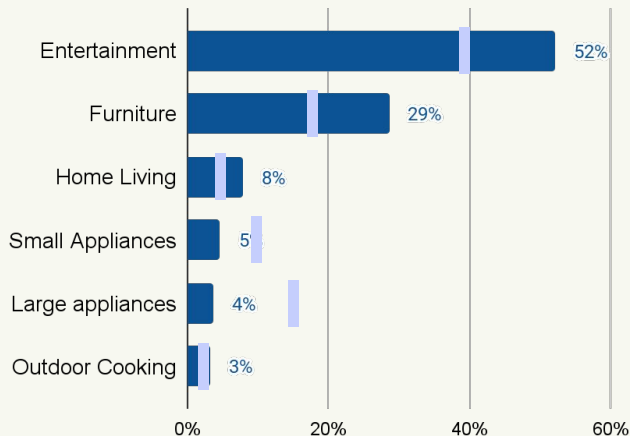
Low maintenance

**Personalised to needs**

**Aesthetically pleasing/ stylish**

**Ergonomic**

#### Category right to play



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What this looks like for people today



## Couch

"Emotionally I feel like **a weight has been lifted off of my shoulders** the exact second I sit down. It figuratively washes away all thoughts of the day, or any hard work I've gone through, as I'm swallowed up in a fabric cloud."

Male, 35-34, NSW, Family



## Bed

"This might not seem a big thing but being around people all day can be tiring sometimes and coming to my room and just be on the bed makes me **feel less anxious and angry.**"

Male, 18-25, Vic, Sharehouse



## Switch and TV

"My switch and TV... allow me to **'switch off'** after a long day and escape to another world **away from my stress and worries** from university".

18-25, Female, NSW, SINK

# Pathway 3

## Showcase

## Successes

Highlight the value of showcasing personal success, catering to the desire for self expression, social recognition and aspirational living.



# For many, their dream home may be out of reach

Economic conditions are a major concern, with the cost of living crisis and rising interest rates making the Australian dream of home ownership increasingly unattainable. The rental market is also in crisis, with costs skyrocketing and availability dwindling.



69%

Of non-homeowners feel like their *dream home is out of reach.*

1 in 2

Australian 18 to 29 years olds are still *living at home* with their parents





# But the contents of our homes are within our control

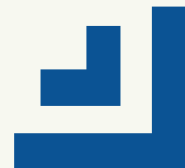
Despite barriers to owning their dream home, people are focusing on what they can control: the contents of their homes. This shift presents a unique opportunity for the home retail sector to cater to people's desire to express personal success, aspirations, and individuality through their home environments.



# F

# 71%

Of Australians Say that my home is *an expression of who I am* and what I love"





# 1 in 3

Say they feel *pressure to maintain a certain appearance* of my life, both online and offline

Driven by societal expectations and social media, people feel the need to measure-up and perform to increasingly high expectations. With these social pressures in mind, the desire for products that allow individuals to showcase an aspirational version of themselves is ever more significant.

To help people experience aspirational living, brands can  
*adopt the posture* of ...



# A Showcase



To do this, brands need to offer aesthetically pleasing, personalised, and aspirational products that enable expression and help people show “they’ve made it”.



Home retail needs to act as a marker for achievement and tool for self expression, enabling people to make a statement about themselves.

#### Look for people who say

- I want to make a statement
- To impress others
- Feel proud
- Something that reflects who I am, my style
- Something a bit more special

#### Describe the product as

- Stylish/ Trendy/ Modern
- Unique/ Exclusive
- Elegant
- Premium
- Luxurious
- Timeless/ Sophisticated

#### Key product attributes to dial up:

**Aesthetically pleasing/ stylish**

Comfortable

Long lasting

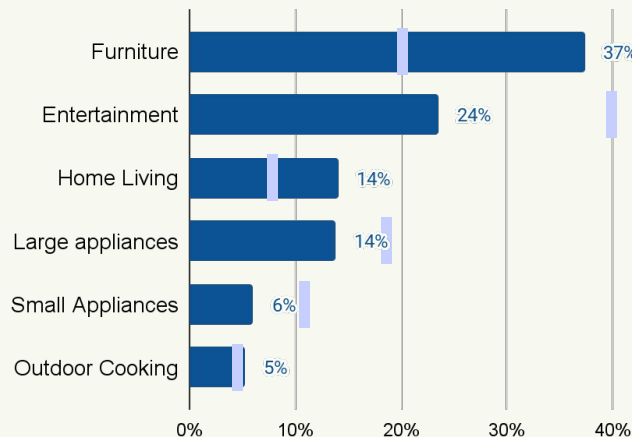
**Made of high quality materials**

**Unique/ stands out**

**Personalised to me**

Brand I love

#### Category right to play



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What this looks like for people today



## Transparent Toaster

"I like the fact that they're doing something hardly done before that I feel everybody would want. The fact that not too many people I know have a toaster that you can see through also gives it an **air of exclusivity.**"

Male, 25-34, NSW, DINK



## Integrated Fridge

"This item in my house would say that **I have made it!** I would define value as being very proud of the appliance and wanting people to come over and see it when you entertain as I think it **shows style** and good interior taste!"

Female, 35-44, QLD, Family



## Side Table

"I'm very happy with this table as every time I walk past it I **can't help but notice how good it looks.**"

18-34, Male, QLD, DINK

Context

The home retail category is being challenged, but the home has never been more important to Australians. Brands need to reframe how they think and talk about home retail in order to build value and turn hesitation into action.

Pathway

1

*Alleviate  
Burdens*

Don't shy away from the negatives of life and home, see products as a way to overcome these obstacles.

Pathway

2

*Reimagine  
Sanctuary*

Redefine the home as a sanctuary. Products that create a space for optimisation, as well as a desperately needed source of solace.

Pathway

3

*Showcase  
Successes*

Highlight the value of showcasing personal success, catering to self expression, recognition and aspiration.

Posture

**A Lifesaver:** Reframing products as heroes, not just tools.

**A Switch On:** Reframing products as vital resources to prepare and energize.

**A Life Coach:** Reframing products as facilitators of peoples' goals, passions or interests.

**A Switch Off:** Reframing products as a way to restore energy and mental well-being.

**A Showcase:** Reframing products as a marker of achievement and aspiration.