Rethink HOW WE LIVE
HOW WE LIVE IN 2015
macro trends
HOW WE LIVE IN 2015

owning vs renting

<table>
<thead>
<tr>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Own home</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td>Paying off</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Renting</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>Other/Not Stated</td>
<td>1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan
How We Live in 2015

Changing Living Arrangements

Partner & Children
JAN 2000 - DEC 2000: 2832
OCT 2013 - DEC 2014: 2995

Partner & No children
JAN 2000 - DEC 2000: 1743
OCT 2013 - DEC 2014: 2359

With Parents
JAN 2000 - DEC 2000: 1016
OCT 2013 - DEC 2014: 1289

Live Alone
JAN 2000 - DEC 2000: 736
OCT 2013 - DEC 2014: 1140

Shared Household
JAN 2000 - DEC 2000: 695
OCT 2013 - DEC 2014: 964

Single Parent
JAN 2000 - DEC 2000: 635
OCT 2013 - DEC 2014: 796

Source: Roy Morgan
## One Person Households on the Rise

<table>
<thead>
<tr>
<th>Country</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>17</td>
</tr>
<tr>
<td>Japan</td>
<td>26</td>
</tr>
<tr>
<td>Netherlands</td>
<td>28</td>
</tr>
<tr>
<td>Austria</td>
<td>29</td>
</tr>
<tr>
<td>Switzerland</td>
<td>34</td>
</tr>
<tr>
<td>United States</td>
<td>35</td>
</tr>
<tr>
<td>Norway</td>
<td>39</td>
</tr>
<tr>
<td>Korea</td>
<td>43</td>
</tr>
<tr>
<td>Australia</td>
<td>48</td>
</tr>
<tr>
<td>England</td>
<td>50</td>
</tr>
<tr>
<td>New Zealand</td>
<td>71</td>
</tr>
<tr>
<td>France</td>
<td>75</td>
</tr>
</tbody>
</table>

1. The periods over which changes are projected are as follows: Australia (2006 to 2026), Austria (2007 to 2030), France (2005 to 2030), Germany 2007 to 2025), Japan (2005 to 2030), Korea (2005 to 2030), Netherlands (2009 to 2030), New Zealand (2006 to 2031), Norway (2002 to 2030), Switzerland (2005 to 2030), United Kingdom (2006 to 2031) and United States (2000 to 2025). Figure 1. One person households

Projected % increase in number of one-person households in selected OECD countries, from early-mid 2000's to 2025-2030

HOW WE LIVE IN 2015

rise in energy bills

Source: Australian Bureau of Statistics. Figure 1. Real electricity and gas price increases, 2003 to 2013
A connected life

In 2010:
- 9% of women had a smartphone as their main mobile phone.
- 5% of women owned an iPad or tablet.

In 2015:
- 67% of women had a smartphone as their main mobile phone.
- 55% of women owned an iPad or tablet.

Source: Roy Morgan.
HOW WE LIVE IN 2015

methodology

FOCUS GROUPS
IN-DEPTH EXPERT INTERVIEWS
READER HOME VISITS
IN-DEPTH EDITOR INTERVIEWS
ONLINE QUANTITATIVE STUDY
“It’s my haven. I have it exactly how I want it with furniture and decor. It’s a place where you can go and it’s just yours.”
6 key themes identified

- Everyone's a stylist
- Hospitable spaces
- Easy living
- Calm spaces
- Bringing the inside out
- Home economics
everyone’s a stylist

As ideas for improving the home are more accessible than ever before, ‘styling’ your home has become an enjoyable part of creating a home, a hobby and an achievement.

“That’s the wonderful thing about my home I can make it my personality.”
women
MULTITASKING
STRONG
MOTHER
CREATIVE
NURTURING

self perception

men
STRONG
FATHER
AMBITIOUS
TRUSTWORTHY
ASSERTIVE

Source: FutureLab Consumer Attitudes Australian Autumn/Winter 2013/14
everyone's a stylist

81% say that when their home looks good, they feel good

“The style of your furniture and the artwork that you choose is very much a reflection of you.”

“I like to change colours from one season to another. In summer I like to freshen up the cushions.”
everyone's a stylist

OWNER
- Splashbacks
- Tiles
- Lighting
- Wallpaper/paint
- Carpets

RENTER
- Removable
- Fairy/String Lights
- Soft Furnishings
- Prints
- Floor lamps
- Rugs
everyone's a stylist

brand implications

PLAY THE PERSONAL STYLIST
ENCOURAGE CREATIVITY / CUSTOMISATION
REMEMBER THE RENTER
Hospitable spaces

Australians are drawing on inspiration from hospitable spaces including hotels, day spas and cinemas to create luxurious living and entertaining environments in their own homes.

“Our homes are more luxurious now while previously they were more functional.”
hospitable spaces

74% agree
I love to travel and explore new places

“I find the bathroom soothing and calming... I love the water, like a beach when you go on holidays. I lock the door and zone out from everyone else. It’s my time.”
HOW WE LIVE

hospitable spaces

OWNER

Heated floors
Walk in wardrobe
Walk in pantry
Scullery
Double sink
Bathrooms and bedrooms blend

RENTER

Soft Furnishings & Fabrics
Luxe accessories eg. candles
HOW WE LIVE

hospitable spaces

brand implications

TAKE ME AWAY

CREATE SPACE

DETAILS & FINISHINGS
Bring the inside out

Australians have always loved their outdoor spaces and bringing the ‘outdoors in’ has long been a design trend in Australian homes. Increasing, we are also seeing a shift to bringing the inside out taking elements from key living spaces outdoors.

“There is less distinction between indoor and outdoor furniture now other than the coverings have to be more durable.”
bring the inside out

42% say that they are spending more time on gardening and making their outside space look good.

“The yard is more landscaped and structural. It’s about looks rather than function.”
POOLS INCORPORATED INTO THE DESIGN OF THE HOUSE
bring the inside out

HOUSE
- Pools
- Fire pits
- Kitchens
- Showers
- TVs

APARTMENT
- Fairy Lights
- Mirrors
- Herb gardens
- Seating
- Vertical gardens
Australians are striving to achieve the right work-life balance and maximise time for family, friends and ‘me time’ by investing in smartly designed homes and appliances for low maintenance living.

“A house is hard work with weekends spent cutting grass and cleaning gutters... you want to have your weekends to spend with friends, socialise, go out for coffee and shopping”
85% say their home has to be practical
67% try to buy products that will save them time

“We don’t want to be tied to the big block of land... we don’t have a blade of grass but we have a patio out the back and that’s enough.”
EASY ACCESS OUTSIDE

SIDE-BY-SIDE WASHER AND DRYER

INTERNAL DRYING AREA/CUPBOARDS

LOTS OF BENCH SPACE

LAUNDRY SHOOTS | SEPARATE HAMPERS | BAGLESS/CORDLESS VACUUM
HOW WE LIVE

easy living

brand implications

MAKE IT LOOK EASY

DEMONSTRATE MULTIPLE USES AND PRACTICAL FEATURES

PROVIDE SUPPORT
Calm spaces

Australians crave calm and clutter-free spaces in their homes to escape the stresses and pressures of the outside world and relax and unwind.

“With busy lives staying at home is a luxury. It’s so nice to be at home.”
79% say their home is their sanctuary

77% try to reduce clutter in their home

“I like to have cushions everywhere. Because we are renting its soft furnishings and things like that that make my home.”
UNCLUTTERED AND SEAMLESS
HOW WE LIVE

calm spaces

OWNER

Joinery
Built in
Walk in
Freestanding
Room

RENTER

Appliances
Soft furnishings
Home wares: timber,
marble
Lamps
calm spaces
brand implications

clean space, clear mind
create a sensory experience
let there be light
The growing cost of energy, in particular the recent hike in electricity prices, making homes more cost effective to run has become a priority for Australians.

“We are really big on our electricity bill and keeping it as low as possible. We are always using as many things on off-peak as possible.”
home economics

73% are more conscious of saving energy than ever before while only...

50% are conscious of reducing their carbon footprint

74% try to maximise natural light in their home
How We Live

Home Economics

Owner
- Solar panels
- Rainwater tanks
- Insulation
- Heating

Renter
- Appliances
- Lighting
- Shower heads
- Blankets!
home economics

brand implications

offer multiple options or functions to help save money
highlight product star systems
money talks over environmental considerations
HOW WE LIVE IN 2015
media muses
“It’s longer, I go over it, I cut out the pictures and really create it on a board. It’s more of an escape for me.”

“If I have a need – a lot of the research I’ll do online.”

How we live in 2015

Media Muses

Brand Implications

Social Media is the Magician

In-store is the Stylist

Websites are the Hunter

TV Programs are the Builder

Homes Magazines are the Curator

Apps are the Doctor