




People Watch

THE CHANGING FACE OF AUSTRALIA

JULY 2017

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In **2016**, Australia's Population reached
23.4M people, +8.8% from 2011.

Australian Bureau of Statistics, 2017

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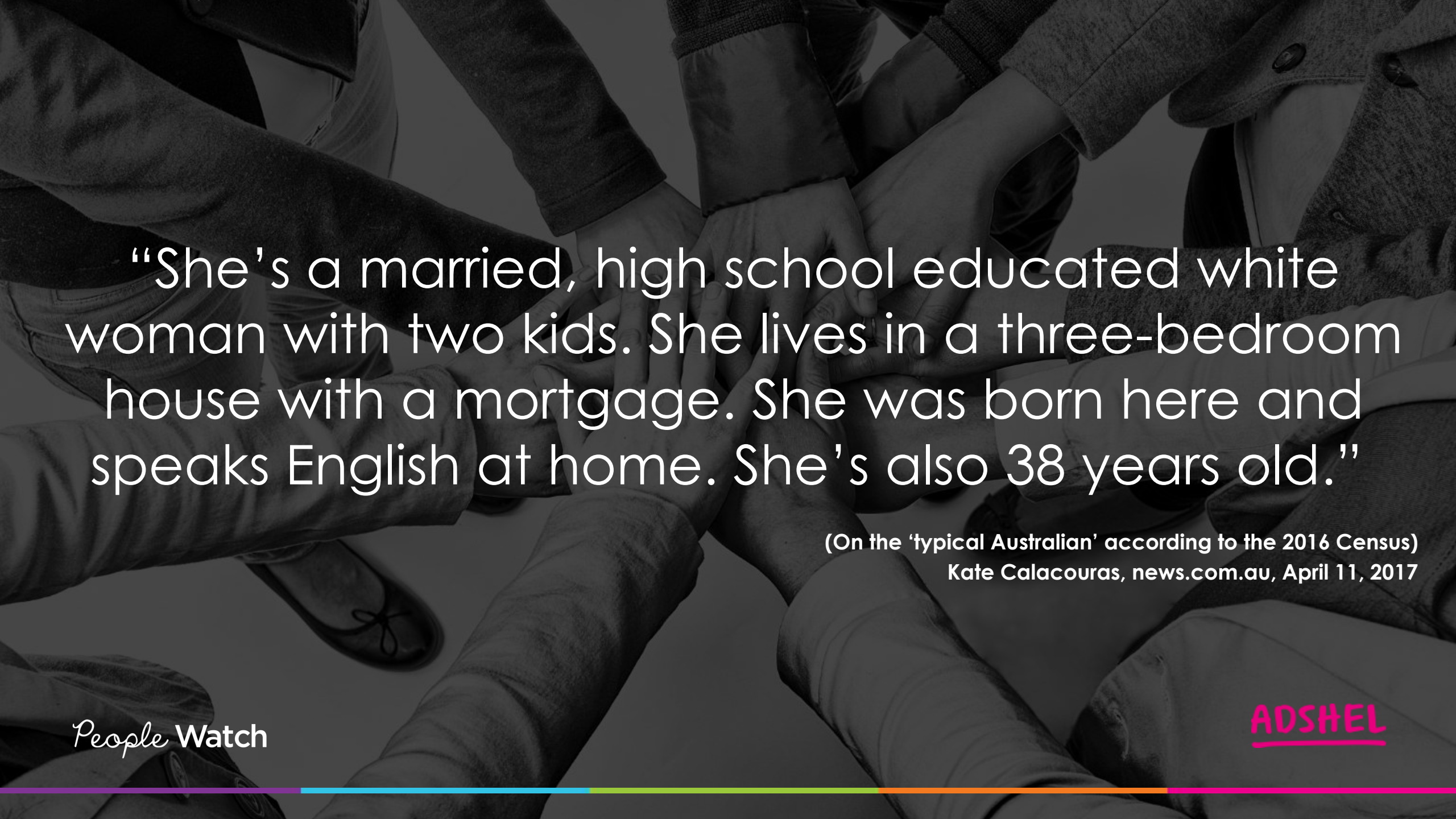
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AUSTRALIA BUT NOT AS YOU KNOW IT

The 2016 Australian Census came and went in spectacular fashion. Despite its technical shortcomings, responses exceeded expectations at 96%. This snapshot gives a fascinating insight into what 'Australian' currently means.

The emerging trends with age, ethnicity, the family unit, housing, attitudes and gender will drive significant change where clichés are questioned and new norms are formed.

For marketers, '**know you audience**' is more critical than ever.



“She’s a married, high school educated white woman with two kids. She lives in a three-bedroom house with a mortgage. She was born here and speaks English at home. She’s also 38 years old.”

(On the ‘typical Australian’ according to the 2016 Census)
Kate Calacouras, [news.com.au](https://www.news.com.au), April 11, 2017

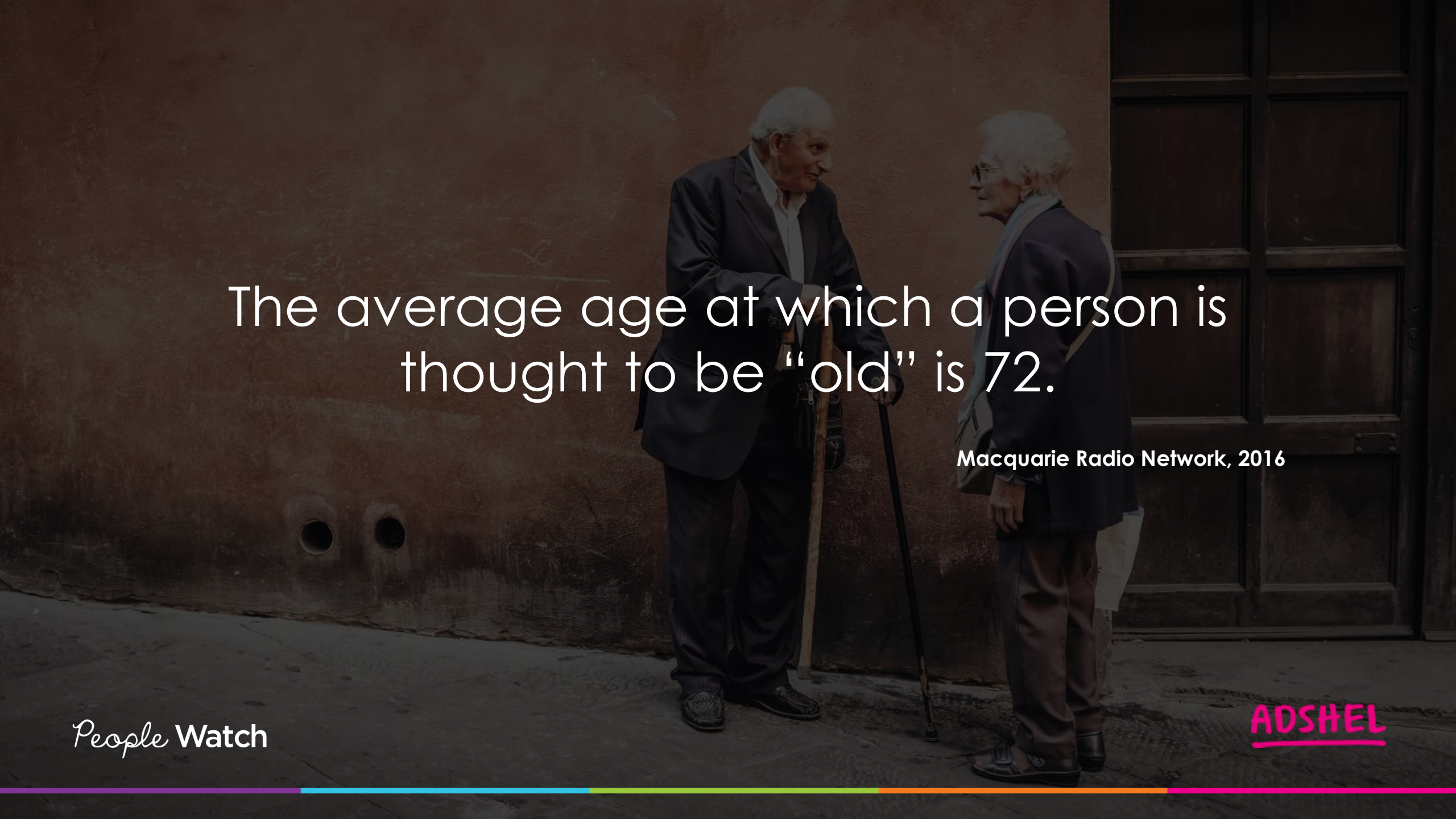


CHANGING FACE OF AUSTRALIA

FIVE INSIGHTS ON
AUSTRALIA'S POPULATION

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The average age at which a person is
thought to be “old” is 72.

Macquarie Radio Network, 2016

1. AGEING GRACEFULLY

- People over the age of 65 now make up **16%** of our population (up 2% from 2011)
- The median age is now **38 years old** (was 37 in 2006)
- Average life expectancy increased to **84.5** for women and **80.4** for men
- Our aged population spend considerably more than younger age groups on groceries, entertainment and going out - **19%** also do the grocery shopping for other households and grandchildren
- Today's older Australians believe that they are **fitter** and **healthier** than generations past
- While desktops and laptops are still the most used, older Australians are big users of **tablets** and **communications apps** such as Skype and Facebook Messenger.

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Source: Australian Bureau of Statistics, Census 2016 | mccrindle.com | Macquarie Radio Network 2016 | ACMA 2016



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A young child with dark hair, wearing a red hooded jacket and light-colored pants, is walking on a wooden deck. The child is smiling and looking down. The background is slightly blurred, showing more of the deck and some structural elements.

For the first time, immigrants from Asia are
overtaking those coming from Europe.

Australian Bureau of Statistics, 2016

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2. CHANGING FACES

- **26%** of Australia's population were born overseas
- **86%** of migrants live in capital cities
- For the first time, immigrants from Asia are overtaking those coming from Europe
- There are now over **300 languages** spoken in Australian homes
- **21%** of Australians do not speak English as the first language in the home
- Asian born citizens are helping counter an aging population with the median age of Asia-born = **35** compared to European-born = **59**
- **Hey big spender!** Retail spend for ethnic Australians is growing at a faster rate than their Australian-born counterparts.

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Source: Australian Bureau of Statistics Census 2016, Nielsen 2017



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“Technological advancements, evolving housing design coupled with population growth, continued migration and changing age demographics, will bring with it new housing norms.”

Dan Huggins, Executive General Manager Home Buying, Commonwealth Bank 2016

3. SHRINKING HOMES

- The nuclear family (couple + kids) is about to be overtaken by couple-only households - **33%** vs **30%** of the population
- More couples are having children later or not at all
- Average household sizes increased from **2.53** to **2.6** (attributed to a more multigenerational household structure in the past ten years)
- Nearly **two thirds** of those living at home can't afford to move out and **one fifth** expect to stay with their parents until they are at least 30
- Couple-only households spend +16% on goods and services than the average Aussie household
- There is a growing trend for couple's finances to be separate with research showing 43% of married couples have separate transaction accounts

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Source: Australian Bureau of Statistics, Census 2016 | mccrindle.com | Commonwealth bank 2016 | CoreLogic 2017



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The number of people declaring themselves in same sex relationships increased by 81% over the last decade.

Source: Australian Bureau of Statistics, 2016

4. LOVE IS IN THE AIR

- Couples are waiting until they are older until they marry (**29.9** for Males and **28.3** for Females)
- Australians still feel the love with the national divorce rate declining
- **70%** of all weddings in Australia are conducted by marriage celebrants
- **72%** of Australians want to legalize same-sex marriage. Australia's openness to the idea has contributed to the increase in same-sex relationships
- The number of people declaring themselves in same sex relationships increased by **81%** over the last decade.

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Source: Australian Bureau of Statistics, Census 2016 | mccrindle.com | Australian Marriage Equality 2016



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“The average Australian woman has to work an extra 66 days a year to earn the same pay as the average man.”

Source: Workplace Gender Equality Agency Report, February 2017

5. GENDER CHALLENGES

- Wonder Woman might own the Box Office and the world has its first female Doctor Who but Australian women are still facing gender challenges
- Women (**51%**) outnumber the male population
- More than **50%** of women identify themselves as the main breadwinner (up from **39%** a decade ago) driven by households with no children
- In comparison, **74%** of men identified as the breadwinner (up 1% since 2006) and some households had both partners identifying as the breadwinner
- The gender pay gap is now at **17%**, (3-5% fluctuation over the last decade)
- Whilst pay disparity is still evident, women drive **70-80%** of all consumer purchasing and now heavily influential in big-ticket items including real estate and vehicles.

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Source: Australian Bureau of Statistics, Census 2016 | mccrindle.com | PWC 2017 | Roy Morgan Single Source 2017 | Forbes.com



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5. GENDER CHALLENGES

- A Monash University study in 2016 showed that one in five men identify as the primary caregiver in Australian households and **85%** of men would leave their jobs to be fulltime parents if their financial security was not impacted
- In the 2016 Census, women reported between 5-14 hours of unpaid domestic work, whereas men reported less than 5
- **26%** of men did no unpaid domestic work in the week before the census compared to **18%** of women
- **31%** of women did unpaid childcare in the week before the census compared to **24%** of men
- There is good news however, **58%** of men say that they 'love to cook'.

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Source: Australian Bureau of Statistics, Census 2016 | mccrindle.com | PWC 2017 | Roy Morgan Single Source 2017 | Fathers, Work and Care, Monash University



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A grayscale photograph of a man in a suit and tie, smiling broadly while holding binoculars to his eyes. The image is semi-transparent, serving as a background for the text.

Are you ready for 2030?

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2030 CRYSTAL BALL

- The nuclear family gets all the attention, but the single-person household will reach **26%** by 2030 (or **3 million** households) which makes it the fastest growing household type
- This will impact house-design, town planning, shopping patterns and travel modes
- The **multi-generational household** will continue to grow where children, parents and grandparents live together – sharing the increasing costs of living in capital cities and caring for ageing relatives
- In 2030, Baby Boomers will be aged 66 - 84. It is expected that they'll **live more independently** than the generations before resulting in significantly more demand on economic resources.

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2030 CRYSTAL BALL

- Over the next few decades, the ageing population will become an issue for unemployment as older Australians retire later than previous generations
- Australia will move away from a resources-reliant workforce to a dominant digital services and **knowledge-driven economy** driven by advancements in connectivity and computing
- This will create a boom in the '**Work from Home**' workforce with an anticipated **33%** of workers employed on a freelance basis by 2030 and be more mobile and not tied to their desk
- The requirements for the workforce of the future are changing, as a result our attitude towards tertiary education will also adapt accordingly.

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SO WHAT?


What does this mean to marketers and their brands?

- Australian households are more diverse, which will require more critical thinking around targeting and better use of data to understand the fragmentation and motivations of changing audiences
- Increased use of multi-language options and creation of advertising that better reflects the population's age, ethnicity, relationships and family makeup
- Single CBDs will become redundant with work flexibility and population growth driving the change
- These second cities will be driven by housing affordability, work opportunities, technological innovation and transport/infrastructure investment.

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A woman with dark hair, smiling, is holding up the Australian flag with both arms. The flag is partially visible, showing the stars and the Union Jack. The background is a soft, out-of-focus blue.

“We are not necessarily bound to the social norms and structures that formed our past, and we are increasingly looking to housing and architecture to better reflect this freedom.”

Shaun Carter, NSW president of the Australian Institute of Architects, 2017



Thank you

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watch in 2017 contact us today

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