

A collage of diverse people, including a young boy, a woman in a blazer, a man, a woman in a white top, and an older woman with glasses, all smiling or looking towards the camera. The collage is overlaid with a dark blue semi-transparent filter.

mccrindle

# Understanding the future consumer

**Mark McCrindle**

Analyse Australia – Understanding the future consumer  
27th August 2020

T +61 2 8824 3422

E [info@mccrindle.com.au](mailto:info@mccrindle.com.au)

W [mccrindle.com.au](http://mccrindle.com.au)

Just pointing out the fact that now is the perfect time to become a ventriloquist.





# CONTENT



# CONTEXT

The background of the slide is a dark blue color. It features a collage of four photographs. The top-left photo shows a young boy with a wide smile. The top-right photo shows a woman with dark hair, wearing a dark top and a light-colored blazer. The bottom-left photo shows a man with a beard and short hair, wearing a dark shirt. The bottom-right photo shows a group of three people: a woman in a white top, a man in a patterned shirt, and an older woman with glasses. The text 'Know the times' is overlaid in a large, bold, red font across the center of the collage.

# Know the times

***Great leaders have a focus not on the next program, but the next generation.***



New York Post   
@nypost



Millennial dads have pathetic DIY skills compared to baby boomers [trib.al/eHmcS15](https://trib.al/eHmcS15)





New York Post   
@nypost



Millennial dads have pathetic DIY skills compared to baby boomers [trib.al/eHmcS15](http://trib.al/eHmcS15)



baby boomers have pathetic blacksmithing skills compared to 9th century Saxons



***Every generation imagines itself to  
be more intelligent than the one  
that went before it, and wiser than  
the one that comes after it.***

GEORGE ORWELL

***The leader's key role is not to single-handedly achieve the outcome, but to understand the times, and shape the environment so that team success is inevitable.***

A collage of diverse people, including a young boy, a woman in a blazer, a man, a woman in a white top, and an older woman with glasses, all smiling or looking towards the camera. The collage is overlaid with a dark blue semi-transparent filter.

mccrindle

# The changing consumer landscape

**Peter Chi**

Analyse Australia – Understanding the future consumer  
27th August 2020

T +61 2 8824 3422

E [info@mccrindle.com.au](mailto:info@mccrindle.com.au)

W [mccrindle.com.au](http://mccrindle.com.au)

# From Westfields...



**...to websites**



...to websites



**\$27.5b**  
Into ecommerce, 2019

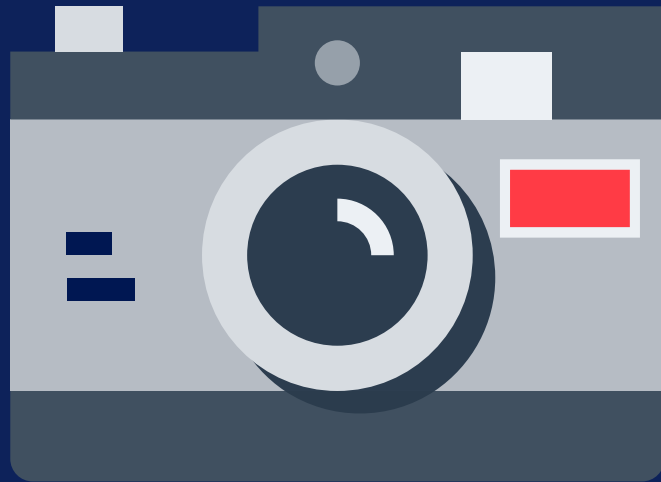
A collage of four photographs showing diverse people: a young child, a woman, a man, and an elderly couple.

# A case study

# The Kodak Moment





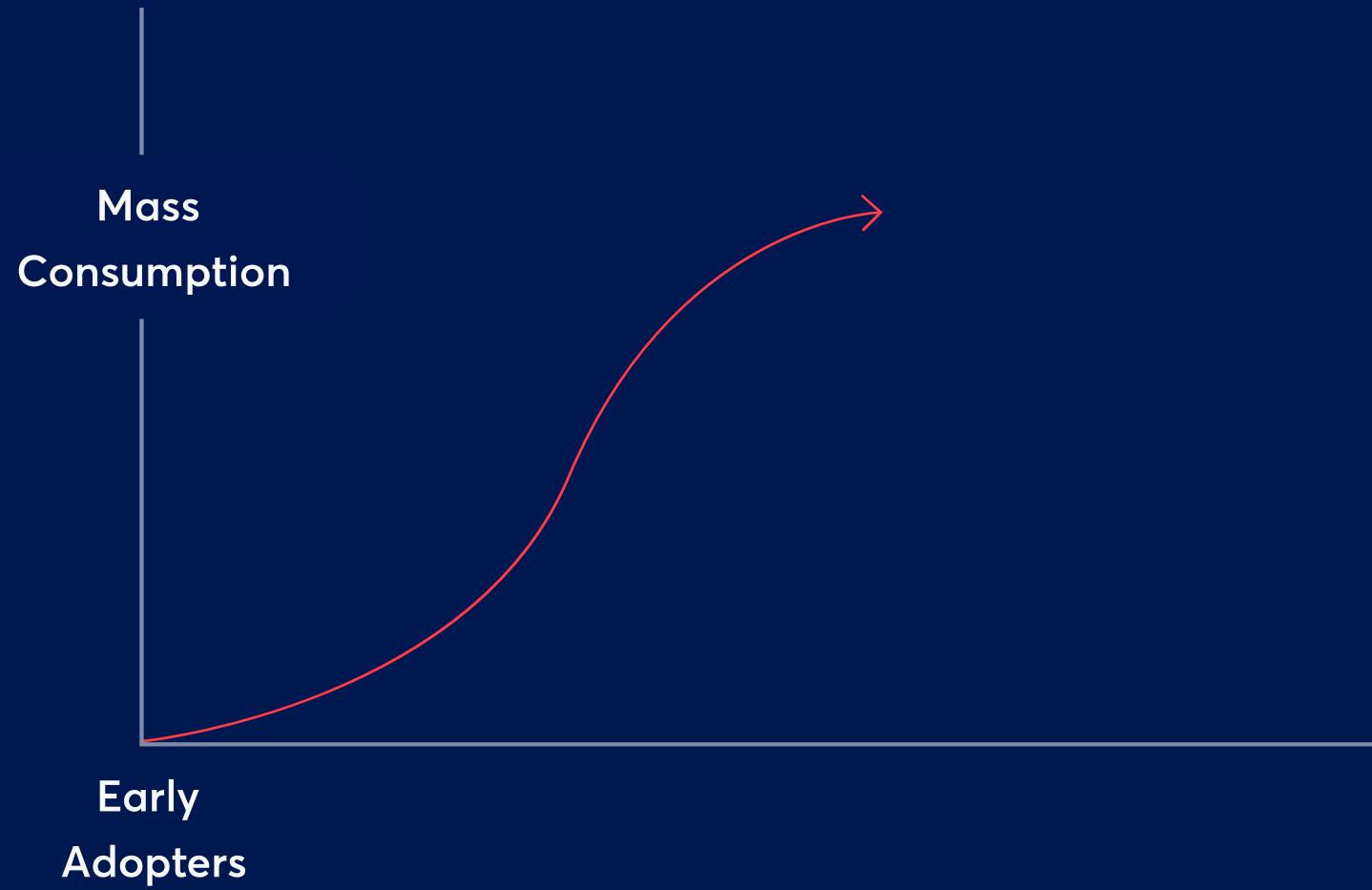


---

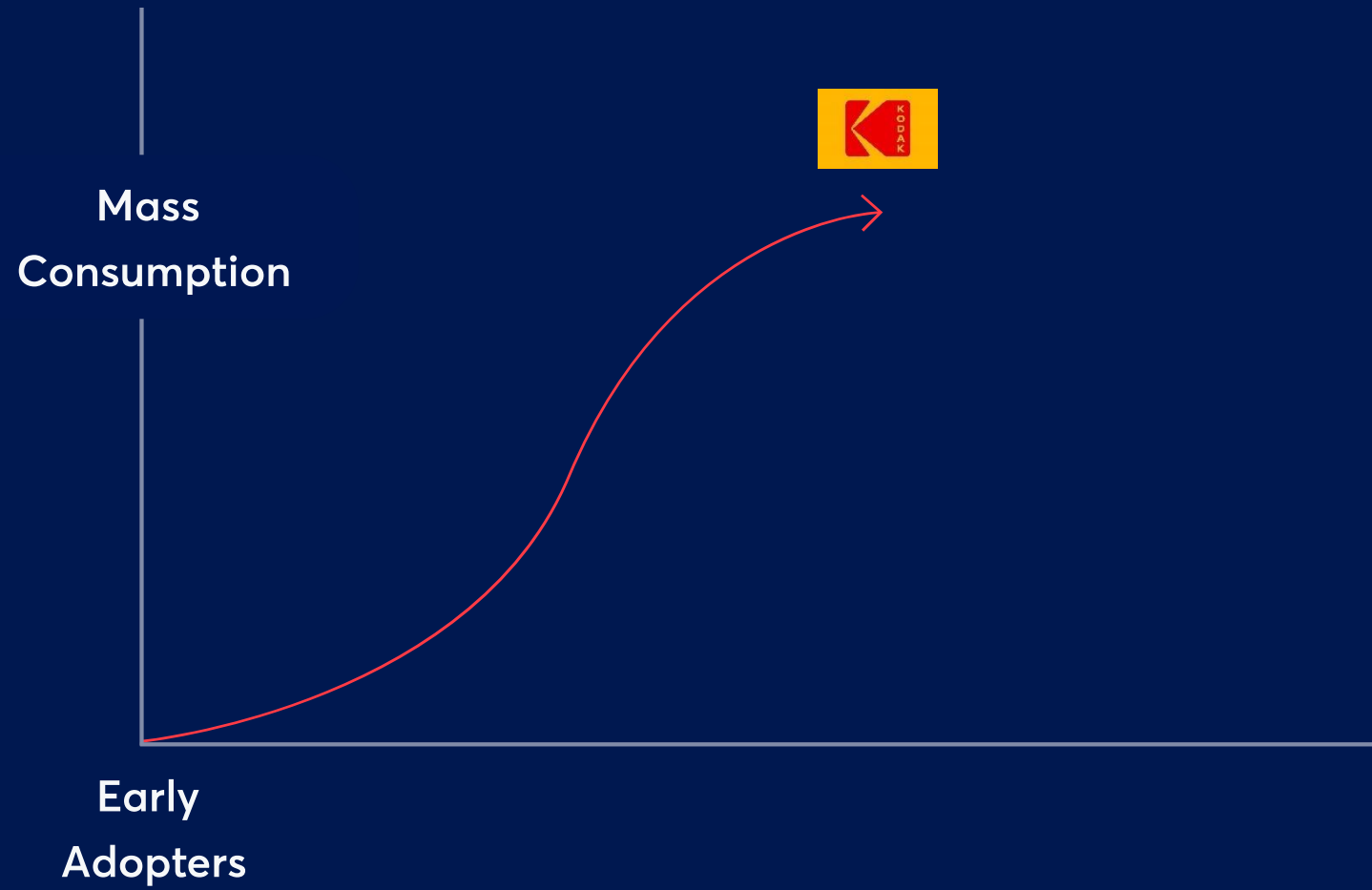
**\$30 BILLION USD**

---

# The quintessential household item



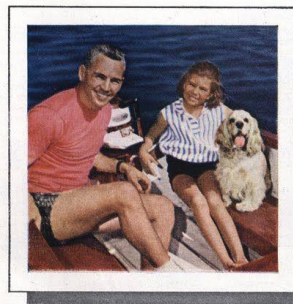
# The quintessential household item



June 28, 1958



“Hey! We almost forgot the most important thing!”



Remember to remember your camera this weekend. And for beautiful snapshots in color—load it with Kodacolor Film



All good times just naturally “happen” in color. So why not catch them that way . . . in Kodacolor snapshots . . . to enjoy over and over again.

Kodacolor snapshots are every bit as easy to take as black-and-whites. And

how they sparkle! Look at the pictures on this page, for example. See how brilliant the colors are? You can have your Kodacolor snapshots processed locally in many cities, or processed by Kodak. Just ask your dealer.

See Kodak's “The Ed Sullivan Show” and “The Adventures of Ozzie and Harriet.”

EASTMAN KODAK COMPANY, Rochester 4, N. Y.

**Kodak**  
TRADEMARK



———— **2012** Kodak declares ————

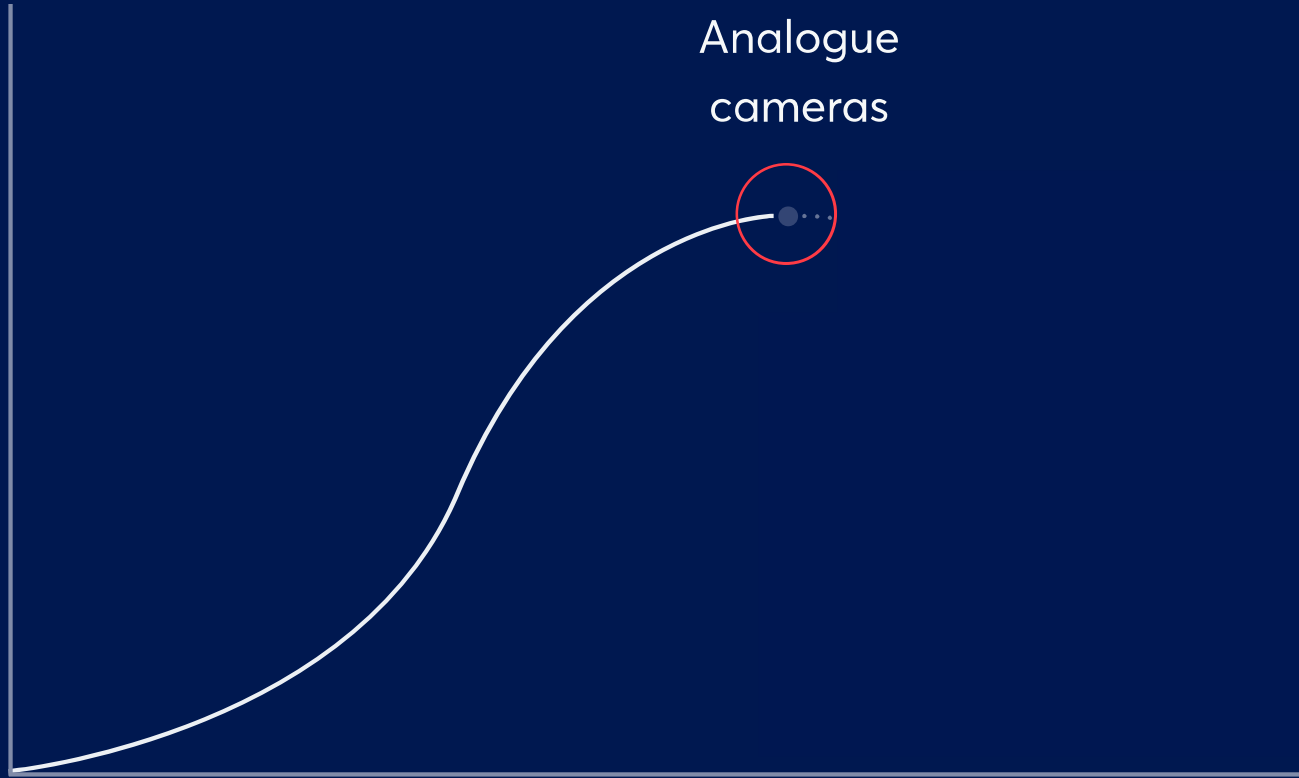
**BANKRUPTCY**

—————

# But failed to capture the next generation



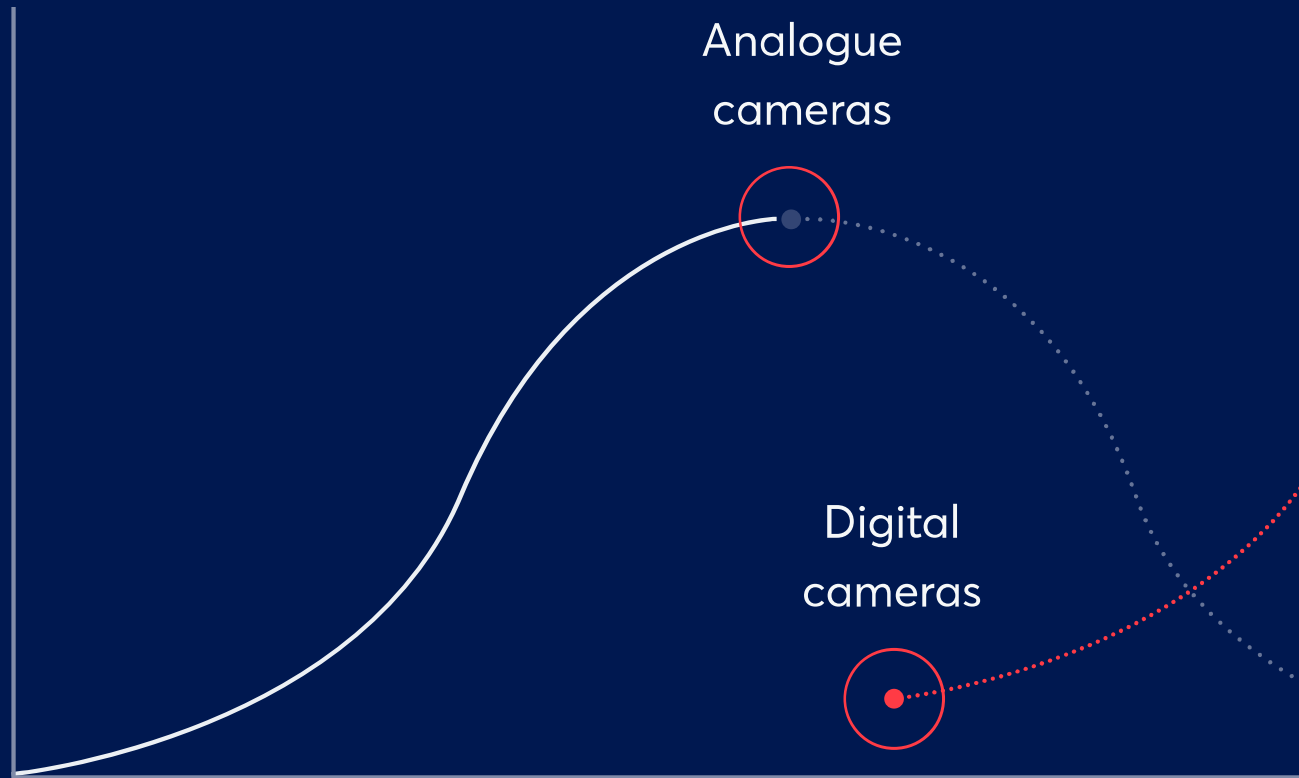
Analogue  
cameras



# But failed to capture the next generation



Analogue  
cameras

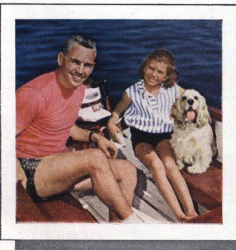


Digital  
cameras

June 28, 1958



“Hey! We almost forgot the most important thing!”



Remember to remember your camera this weekend. And for beautiful snapshots in color—load it with Kodacolor Film



All good times just naturally “happen” in color. So why not catch them that way...in Kodacolor snapshots...to enjoy over and over again. Kodacolor snapshots are every bit as easy to take as black-and-whites. And

how they sparkle! Look at the pictures on this page, for example. See how brilliant the colors are? You can have your Kodacolor snapshots processed locally in many cities, or processed by Kodak. Just ask your dealer.

See Kodak's “The Ed Sullivan Show” and “The Adventures of Ozzie and Harriet.”

EASTMAN KODAK COMPANY, Rochester 4, N. Y.

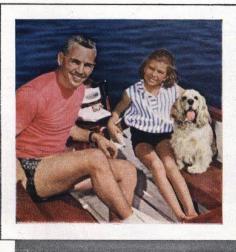




June 28, 1958



“Hey! We almost forgot the most important thing!”



Remember to remember your camera this weekend. And for beautiful snapshots in color—load it with Kodacolor Film



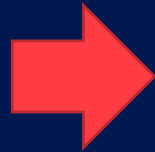
All good times just naturally “happen” in color. So why not catch them that way... in Kodacolor snapshots... to enjoy over and over again.

Kodacolor snapshots are every bit as easy to take as black-and-whites. And

how they sparkle! Look at the pictures on this page, for example. See how brilliant the colors are? You can have your Kodacolor snapshots processed locally in many cities, or processed by Kodak. Just ask your dealer.

See Kodak's “The Ed Sullivan Show” and “The Adventures of Ozzie and Harriet.”

EASTMAN KODAK COMPANY, Rochester 4, N. Y.



HOME COOLPIX NIKON D-SLR ASHTON'S VIDEOS WHERE TO BUY



## Nikon COOLPIX S800c


THE FIRST CAMERA OF ITS KIND

With the imaging power of a Nikon, the intuitive functions of an Android and Wi-Fi connectivity. Finally, we can share image quality with the web.







 DRAG, SWIPE OR USE ARROWS TO EXPLORE



LOW-LIGHT PERFORMANCE

# The two-fold challenge:

# The two-fold challenge:



**Communicating  
key brand messages**

# The two-fold challenge:

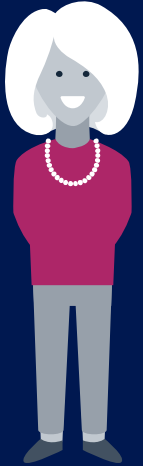


**Communicating  
key brand messages**



**Understanding  
unique needs of  
your consumers**

***To setup organisations to thrive in the current market, it is more important than ever to gain insight into today's consumers.***



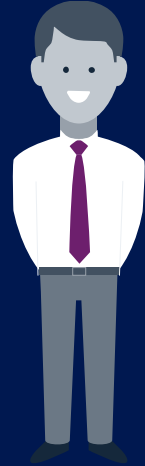
**Builders**

Age: 75+



**Boomers**

Age: 56-74



**Gen X**

Age: 41-55



**Gen Y**

Age: 26-40



**Gen Z**

Age: 11-25



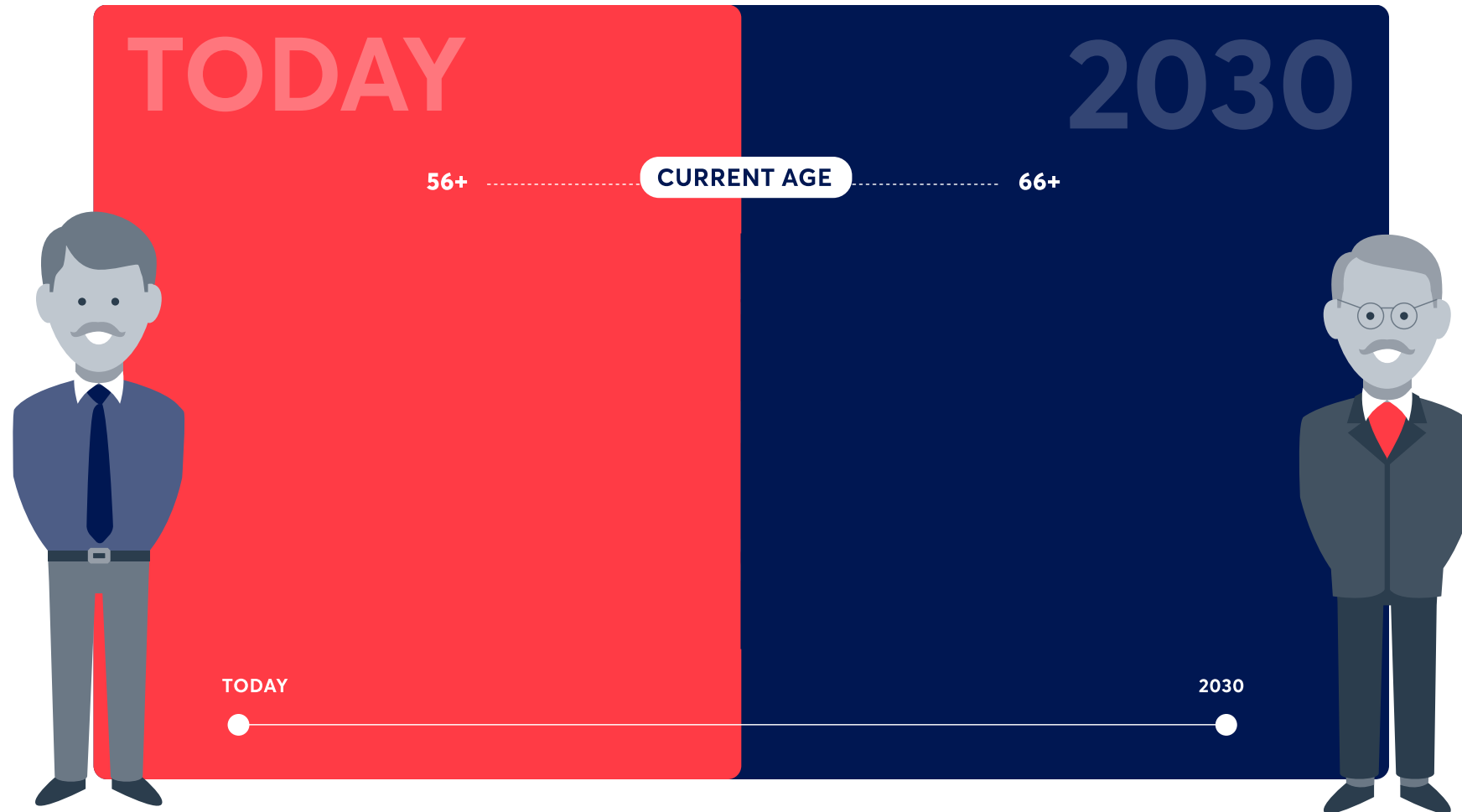
**Alpha**

Age: under 11

# Baby Boomers & Builders

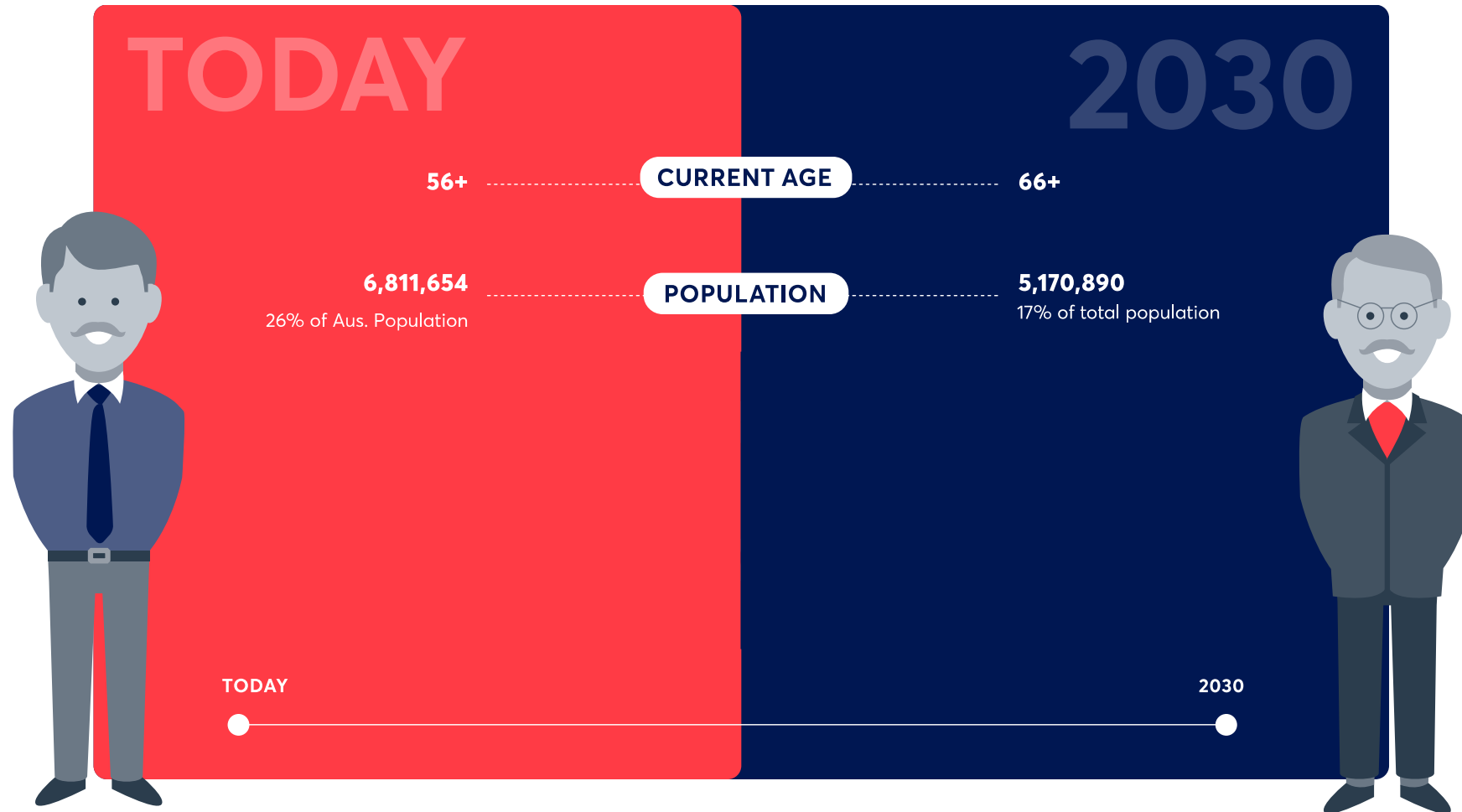


# Demographic profile

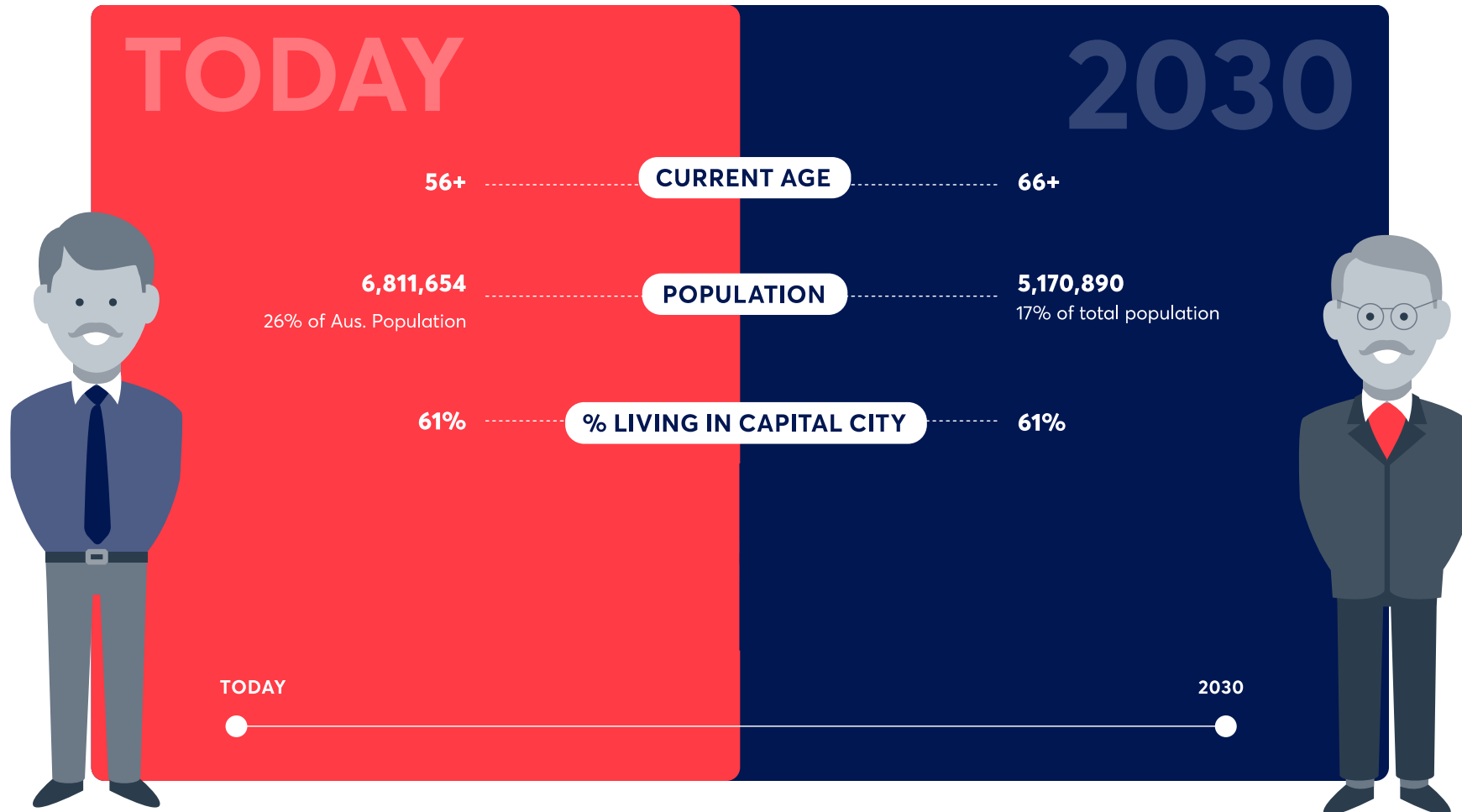




# Demographic profile



# Demographic profile





# 65 is the new 50

# 65 is the new 50



LIFE EXPECTANCY

# 65 is the new 50

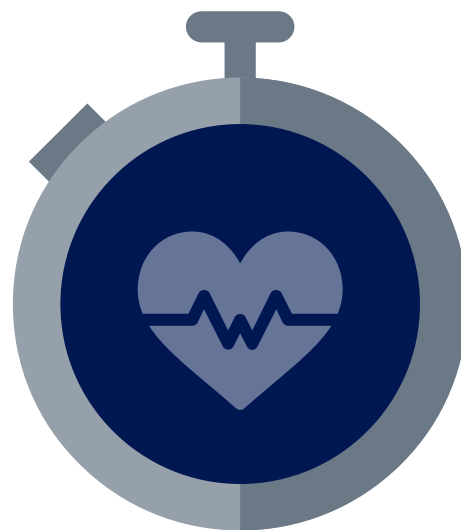


LIFE EXPECTANCY

1920

61 YEARS

# 65 is the new 50



LIFE EXPECTANCY

1920

61 YEARS

TODAY

81 YEARS

# 65 is the new 50



AUSTRALIANS AGED 65 AND  
OVER HAVE A WORKFORCE  
PARTICIPATION RATE OF

# 65 is the new 50



AUSTRALIANS AGED 65 AND  
OVER HAVE A WORKFORCE  
PARTICIPATION RATE OF

2006

8%



# 65 is the new 50



AUSTRALIANS AGED 65 AND  
OVER HAVE A WORKFORCE  
PARTICIPATION RATE OF

2006

8%

TODAY

13%

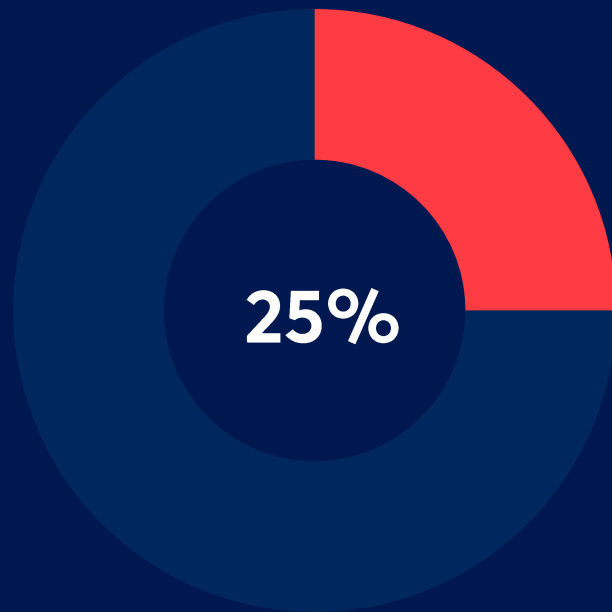
# Shaped by technology

% of total digital purchases by Boomers + Builders

# Shaped by technology

% of total digital purchases by Boomers + Builders

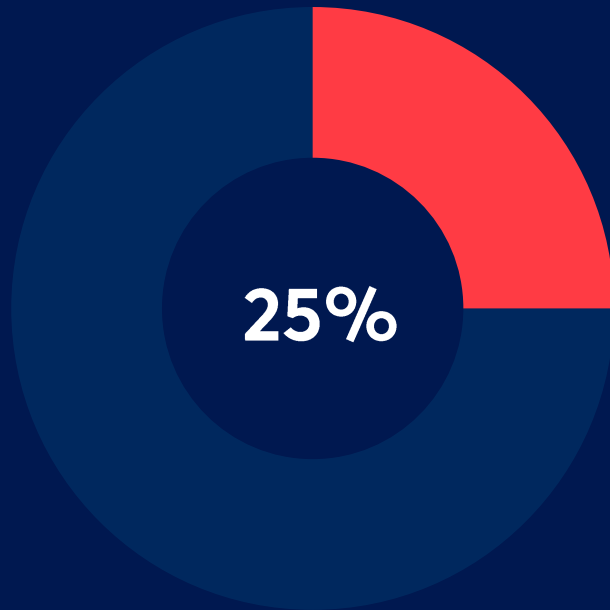
2016



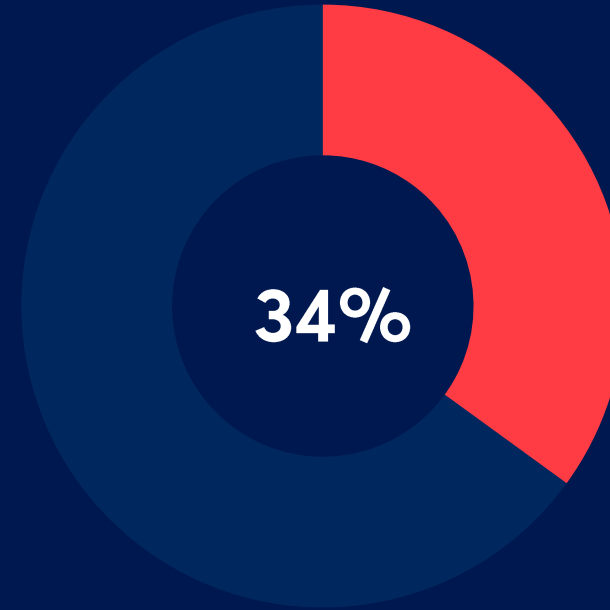
# Shaped by technology

% of total digital purchases by Boomers + Builders

2016



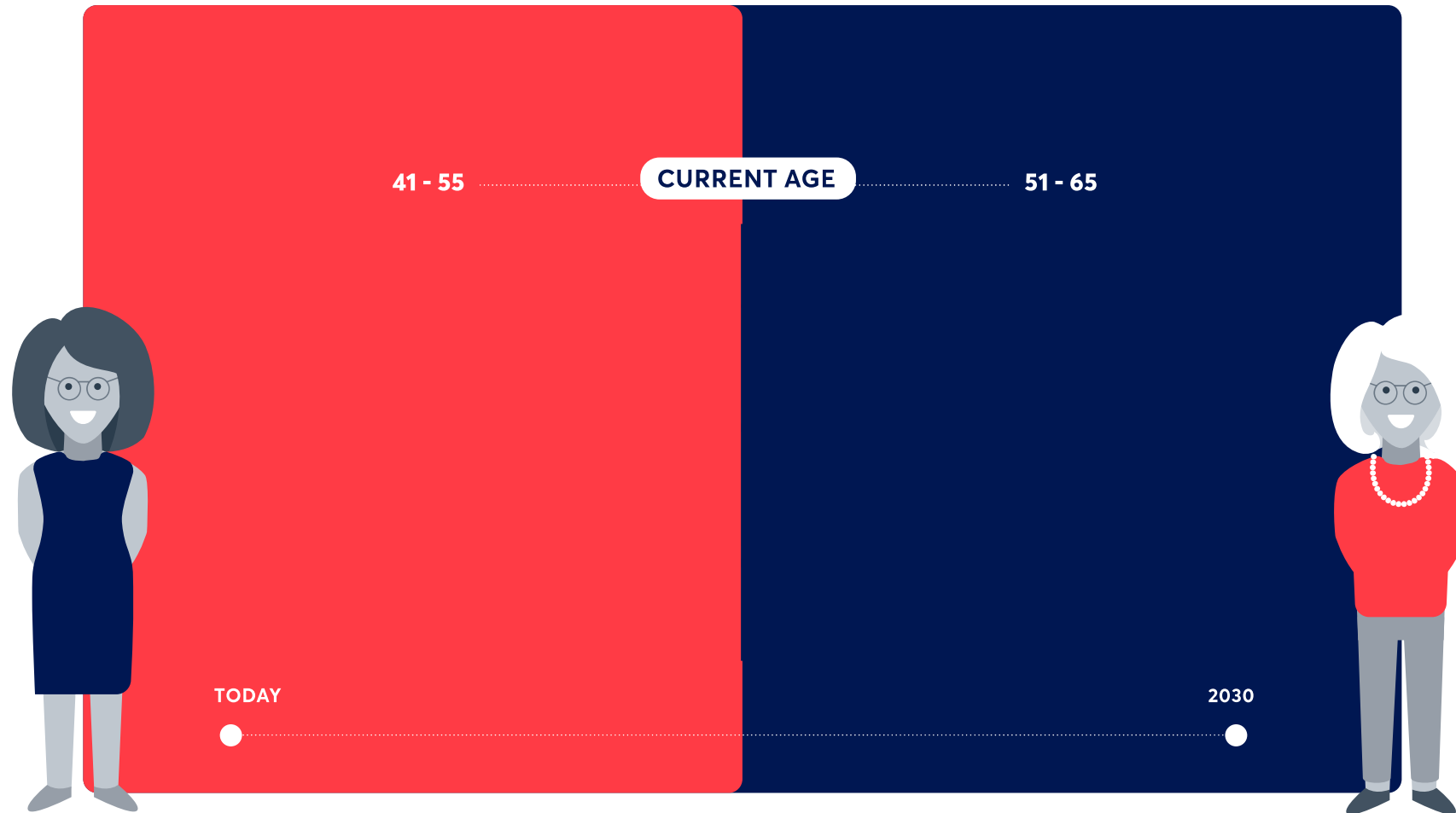
Today



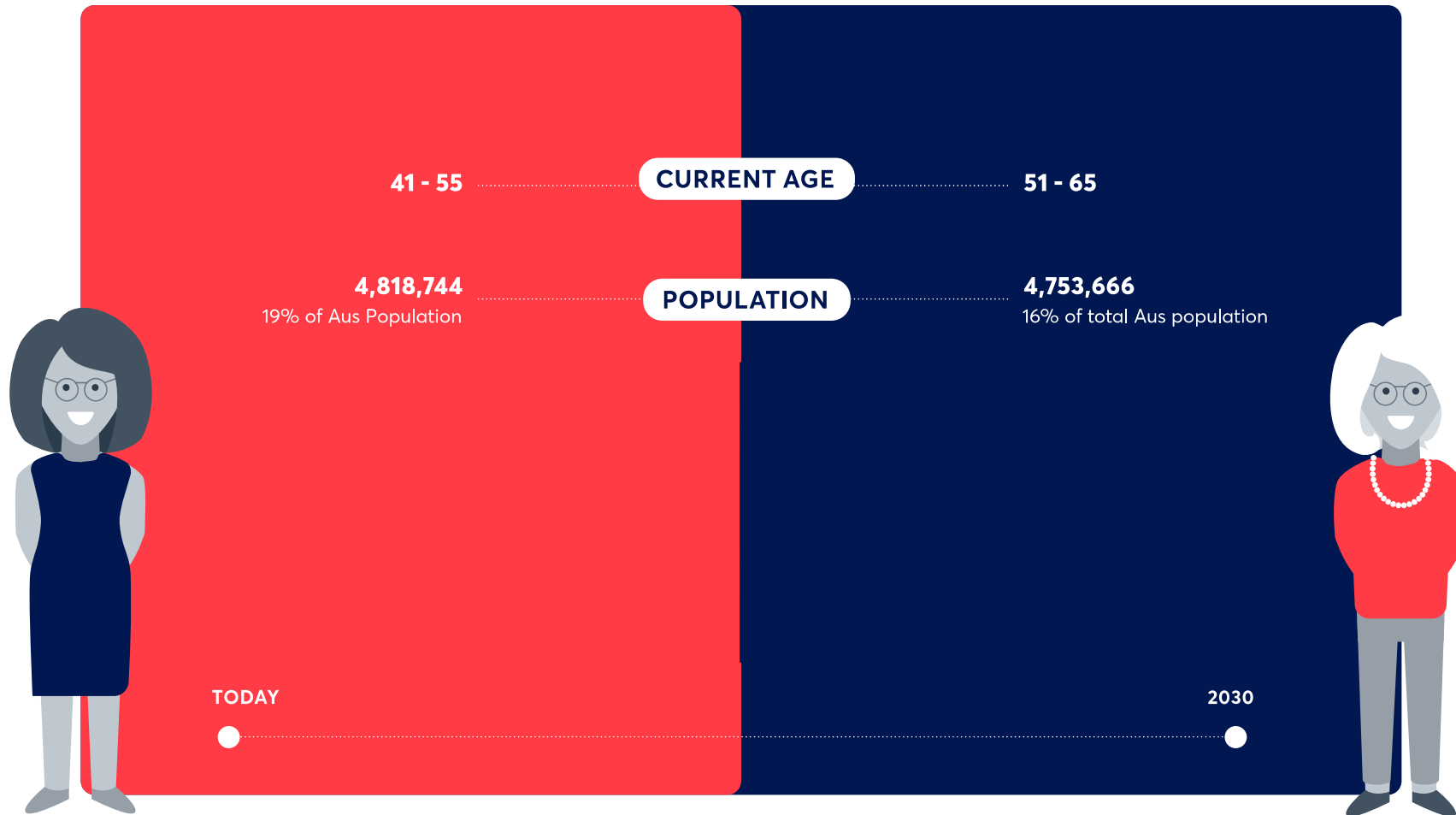
# Generation X



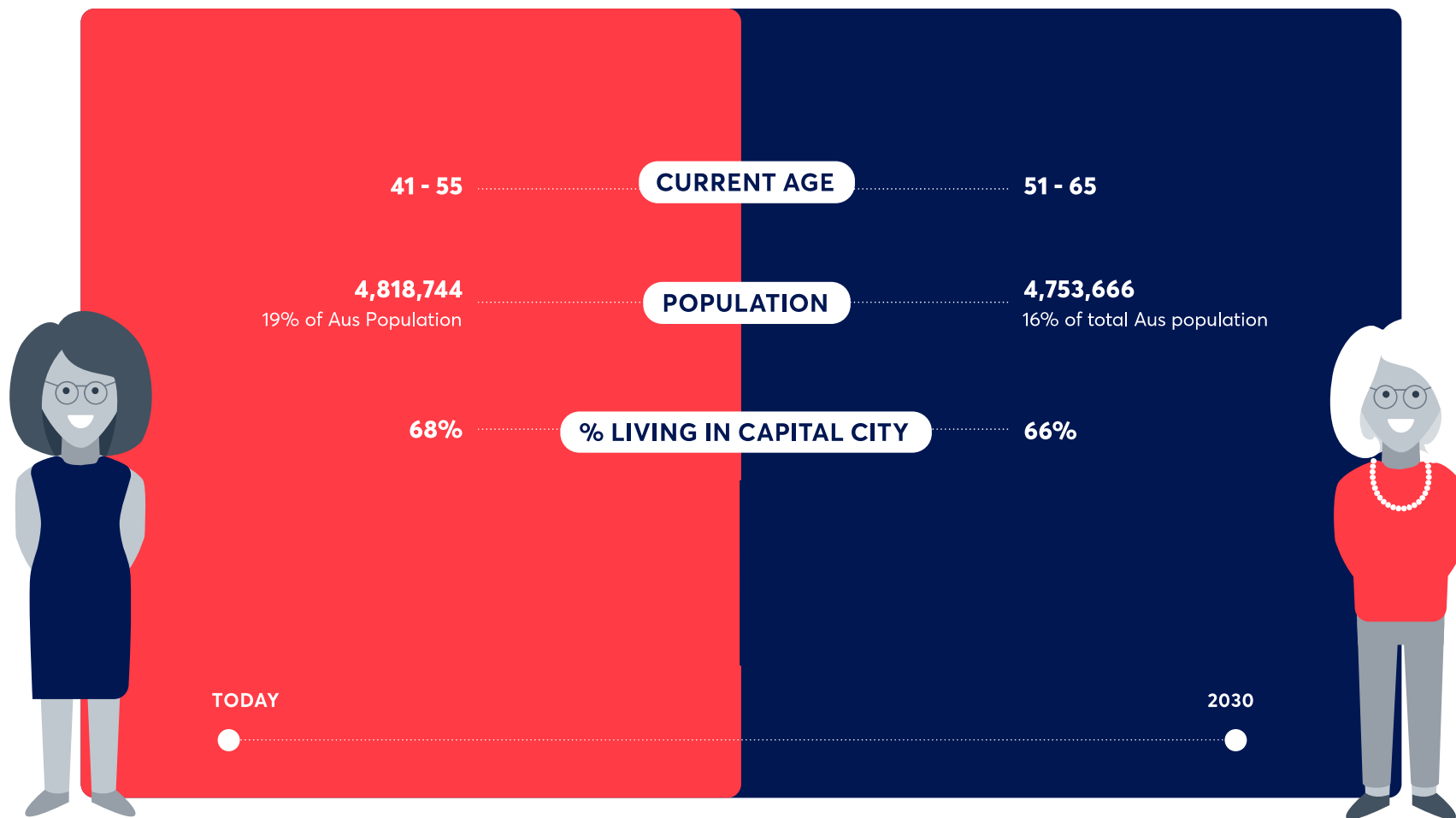
# Demographic profile



# Demographic profile

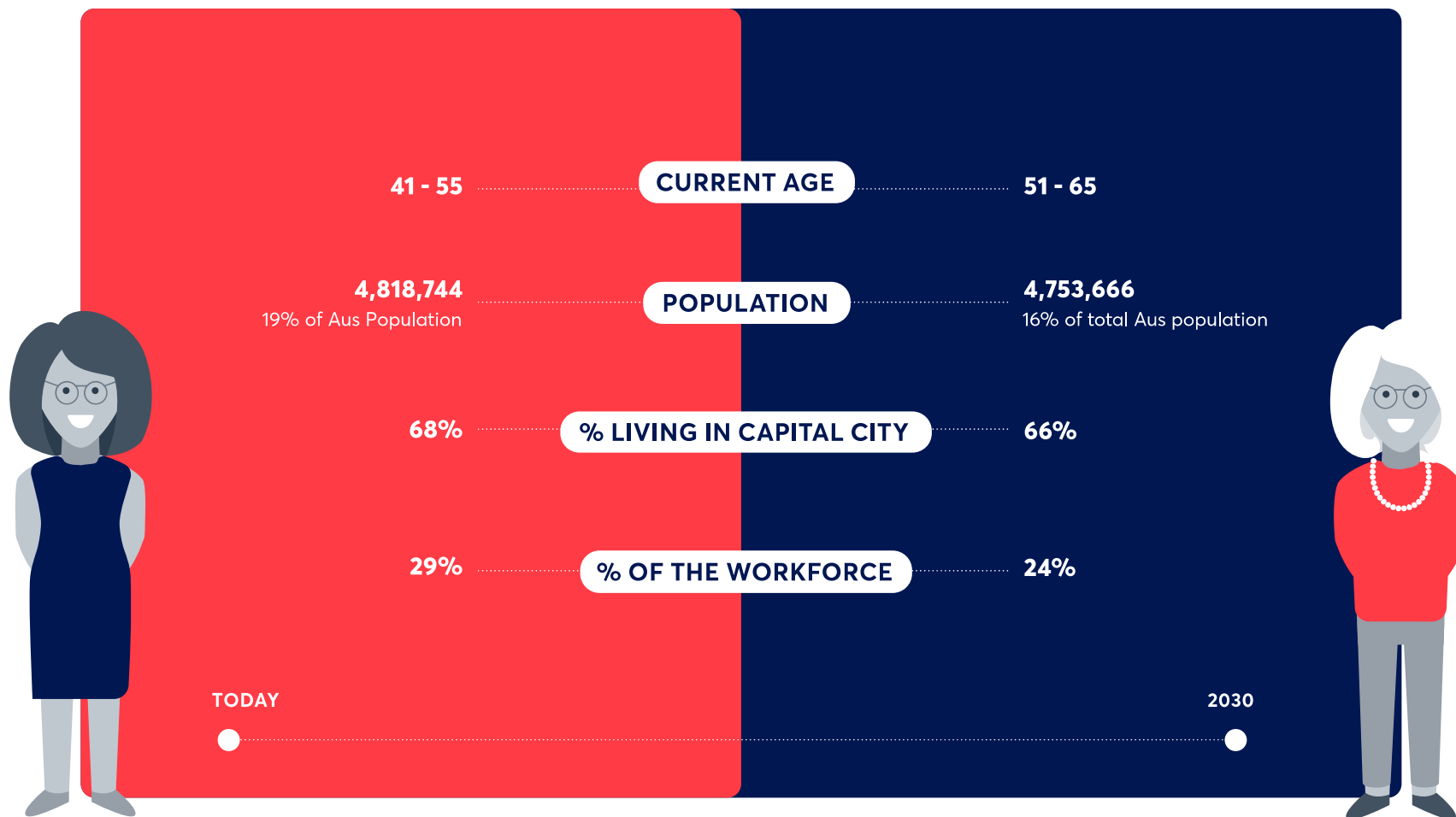


# Demographic profile





# Demographic profile



A collage of four photographs showing diverse people: a young child, a woman, a man, and a woman holding a child.

# An iconic generation

# From against the man...



...to being the man



# ...to being the man



CEO  
50  
Years old



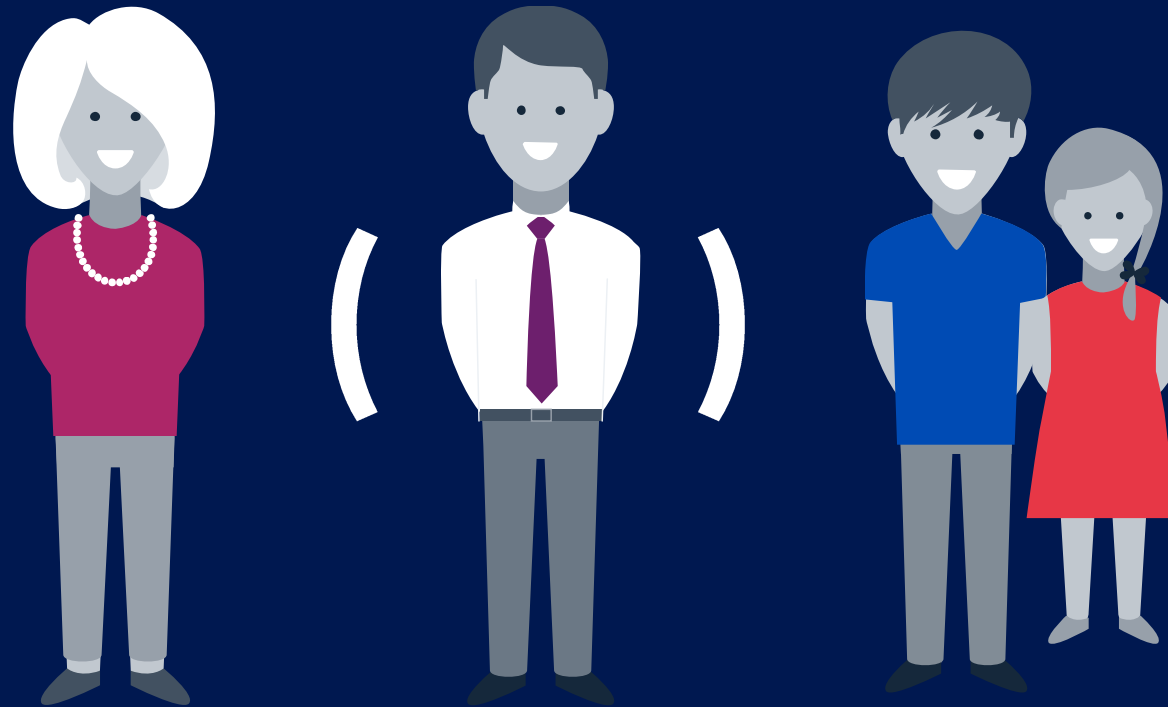
# The sandwich generation



# The sandwich generation



# The sandwich generation

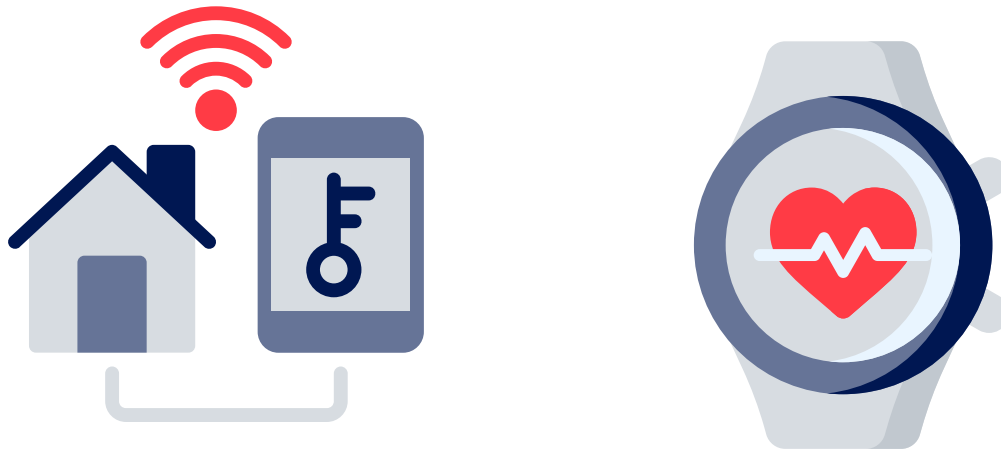




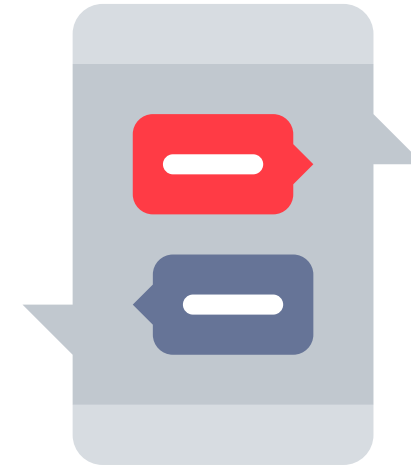
# The sandwich generation



# The sandwich generation



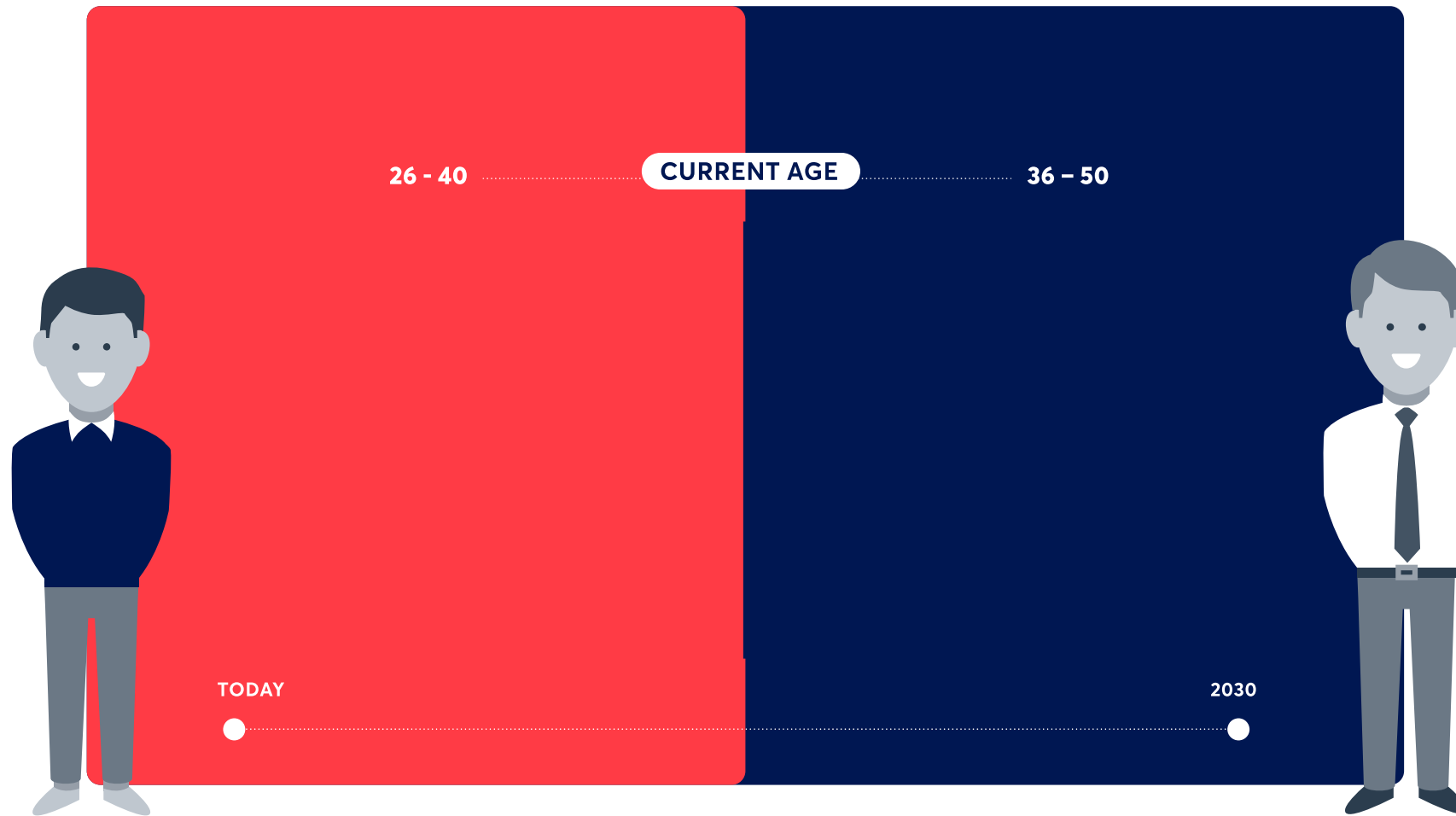
# The sandwich generation



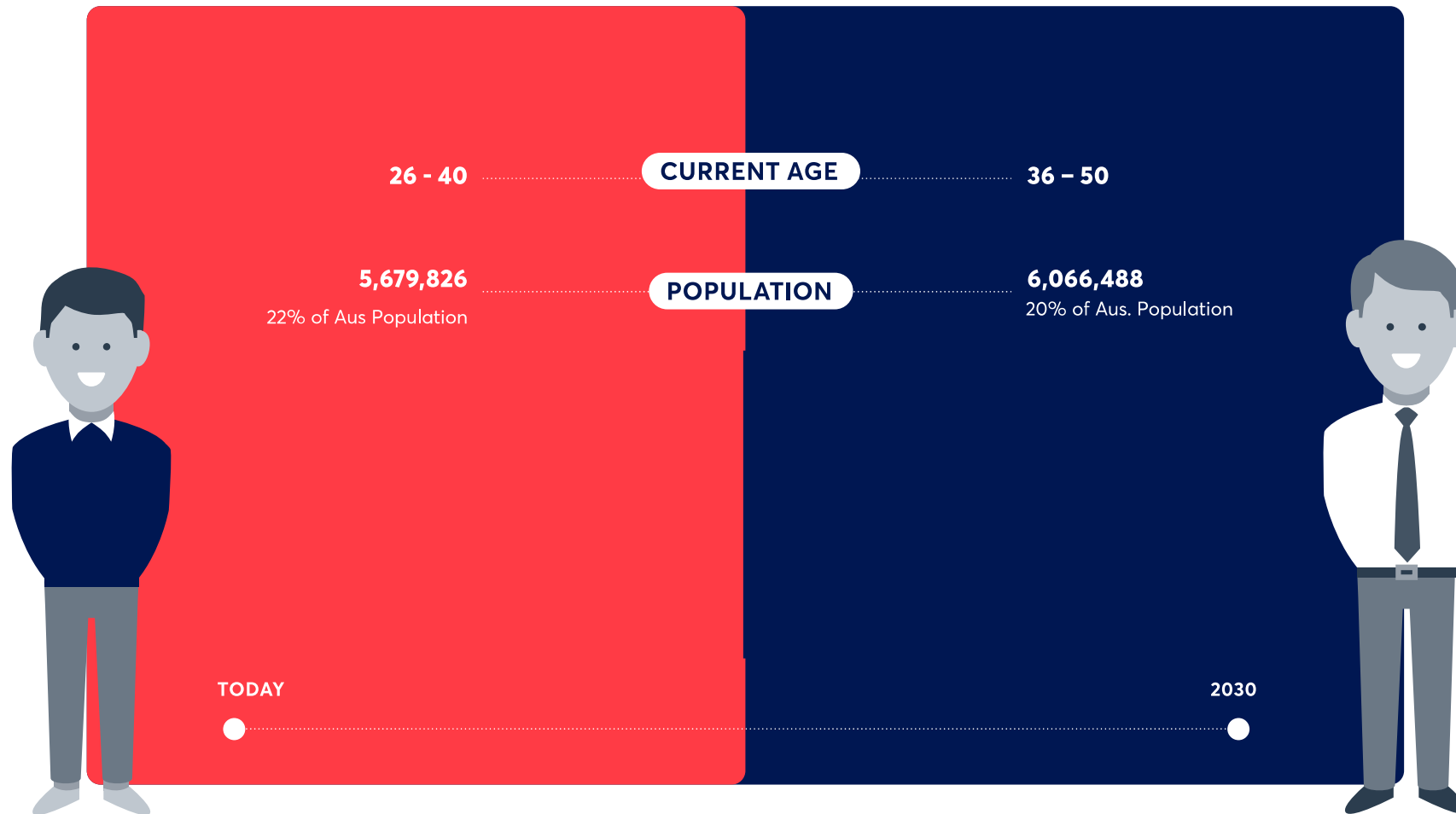
# Generation Y



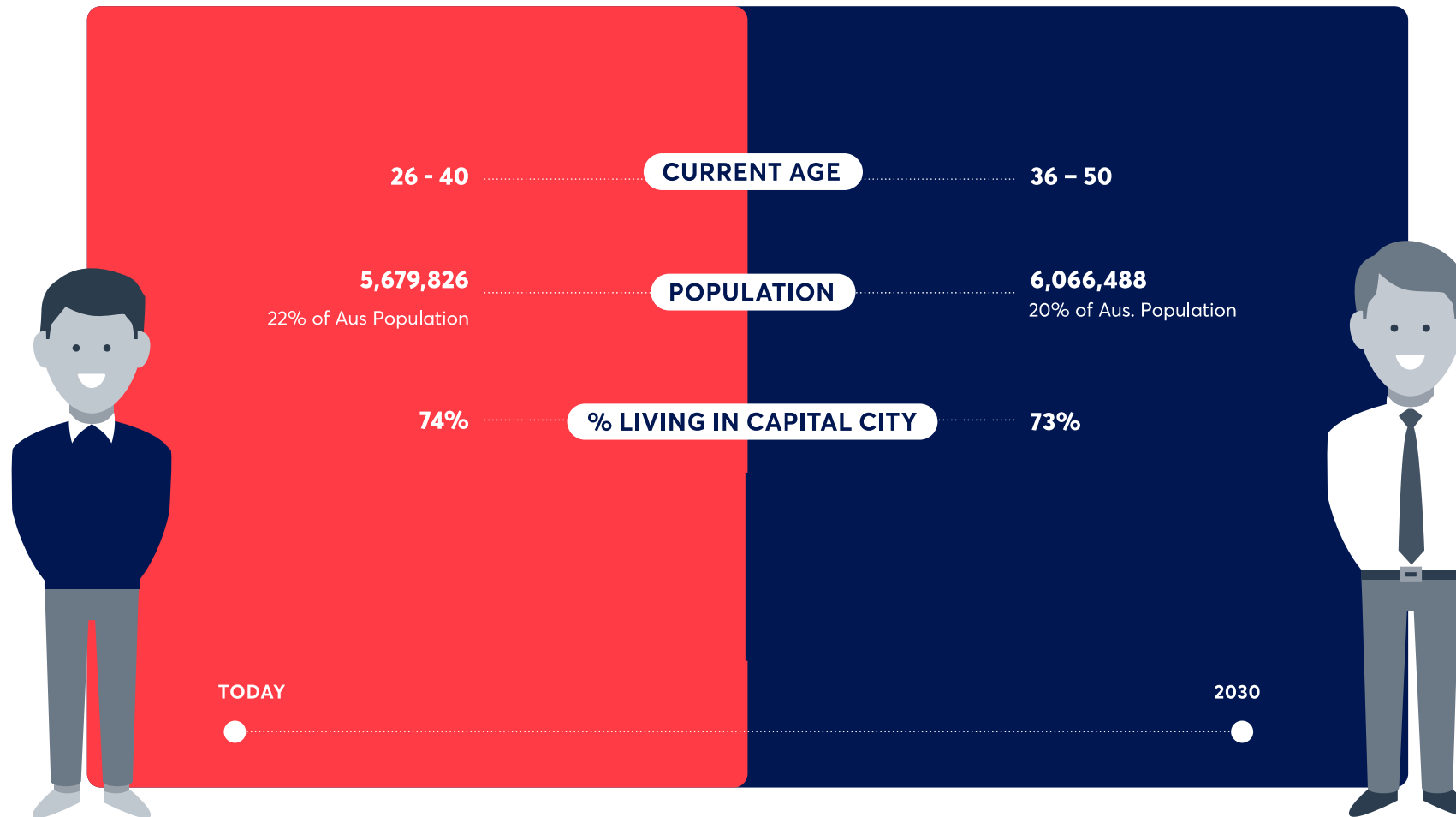
# Demographic profile



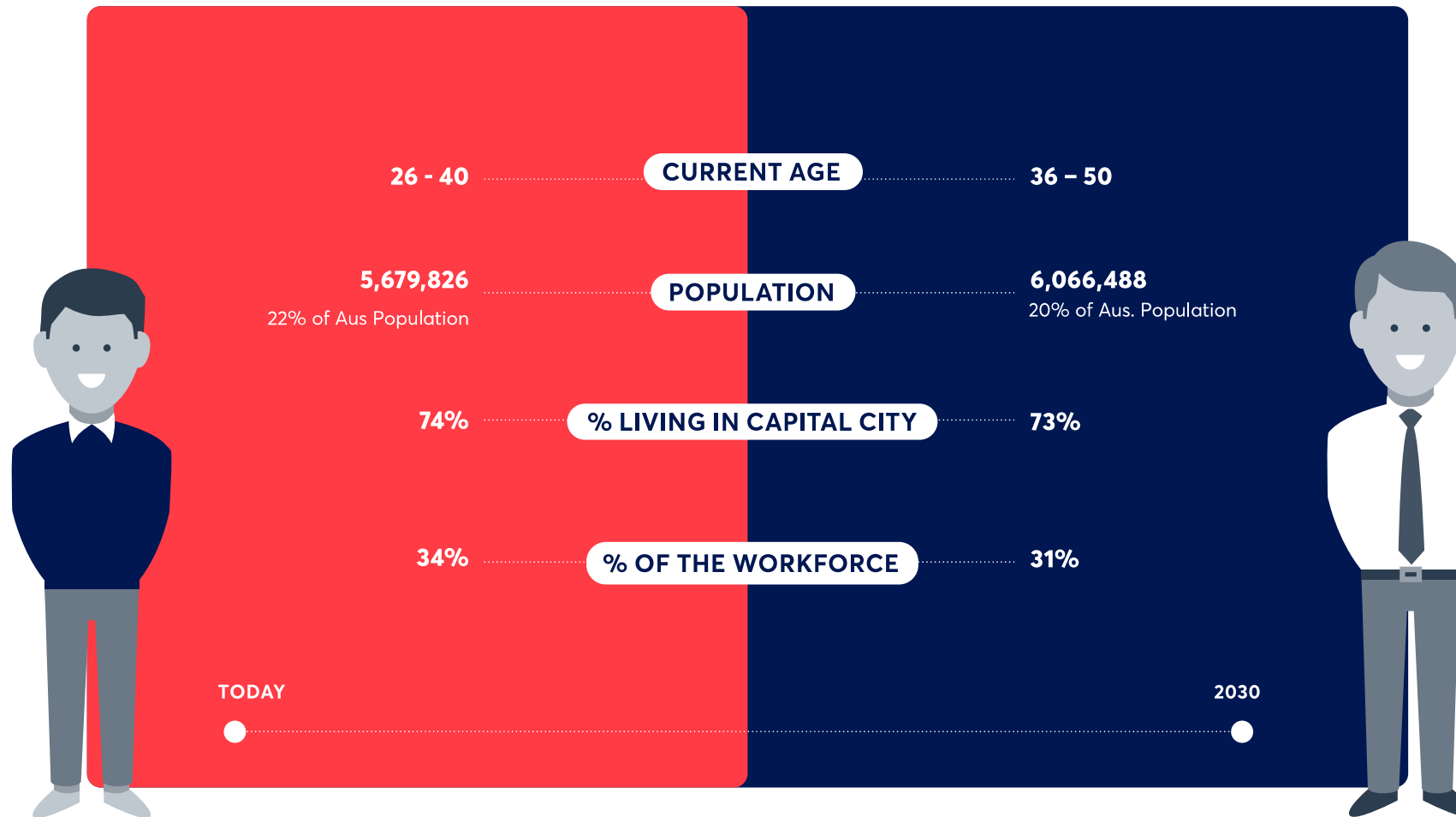
# Demographic profile



# Demographic profile



# Demographic profile







# The new modern family

# The new modern family

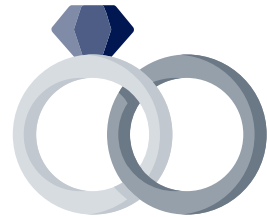


## MEDIAN AGE OF MARRIAGE

Females ♀

Males ♂

# The new modern family



## MEDIAN AGE OF MARRIAGE

1987

Females ♀ 25.2

Males ♂ 27.6

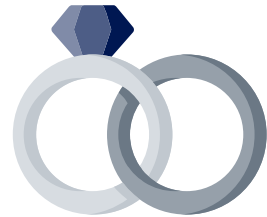
# The new modern family



## MEDIAN AGE OF MARRIAGE

		1987	TODAY
Females	♀	25.2	30.5
Males	♂	27.6	32.4

# The new modern family



## MEDIAN AGE OF MARRIAGE

	1987	TODAY
Females ♀	25.2	30.5
Males ♂	27.6	32.4



## MEDIAN AGE FOR A MOTHER AT THE BIRTH OF HER FIRST CHILD

# The new modern family



## MEDIAN AGE OF MARRIAGE

	1987	TODAY
Females ♀	25.2	30.5
Males ♂	27.6	32.4



## MEDIAN AGE FOR A MOTHER AT THE BIRTH OF HER FIRST CHILD

1987

26.8

# The new modern family



## MEDIAN AGE OF MARRIAGE

	1987	TODAY
Females ♀	25.2	30.5
Males ♂	27.6	32.4



## MEDIAN AGE FOR A MOTHER AT THE BIRTH OF HER FIRST CHILD

1987	TODAY
26.8	31.4

# The new modern family



**BOTH PARENTS  
WORKING FULL TIME  
WITH CHILDREN  
UNDER 5**



# The new modern family



**BOTH PARENTS  
WORKING FULL TIME  
WITH CHILDREN  
UNDER 5**

**2009**

**14%**

# The new modern family



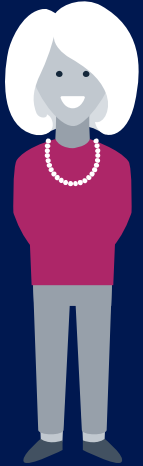
**BOTH PARENTS  
WORKING FULL TIME  
WITH CHILDREN  
UNDER 5**

**2009**

**14%**

**TODAY**

**21%**



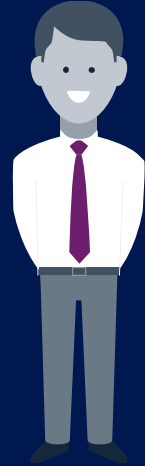
**Builders**

Age: 75+



**Boomers**

Age: 56-74



**Gen X**

Age: 41-55



**Gen Y**

Age: 26-40



**Gen Z**

Age: 11-25



**Alpha**

Age: under 11





# Why are they so important?

# Why are they so important?

In 2030 they will be...

# Why are they so important?

In 2030 they will be...



Aus. population

# Why are they so important?

In 2030 they will be...



Aus. population



Workforce

A collage of diverse people, including a young boy, a woman, and an older man, overlaid with a blue tint.

mccrindle

# The future consumers: Gen Z and Gen Alpha

**Ashley Fell**

Analyse Australia – Understanding the future consumer  
27th August 2020

T +61 2 8824 3422

E [info@mccrindle.com.au](mailto:info@mccrindle.com.au)

W [mccrindle.com.au](http://mccrindle.com.au)



***“Generations are just  
used for labels.  
Kids today are the same  
as the young people of  
my day.”***

***Generations do not change over time to look identical to how their parents looked at the same age. Rather, a generation is a product of their current age, their times, and importantly the formative technologies and social markers that uniquely shaped them.***

# THE GREAT SCREENAGE







# Digital Migrants



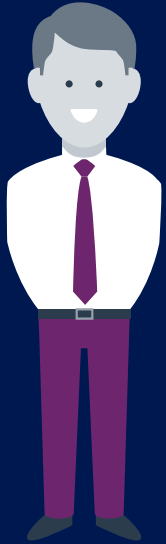
**Builders**  
Age: 75+



**Boomers**  
Age: 56-74



# Digital Natives



**Gen X**  
Age: 41-55



**Gen Y**  
Age: 26-40



# Digital Integrators



**Gen Z**  
Age: 11-25



**Generation Alpha**  
Age: under 11

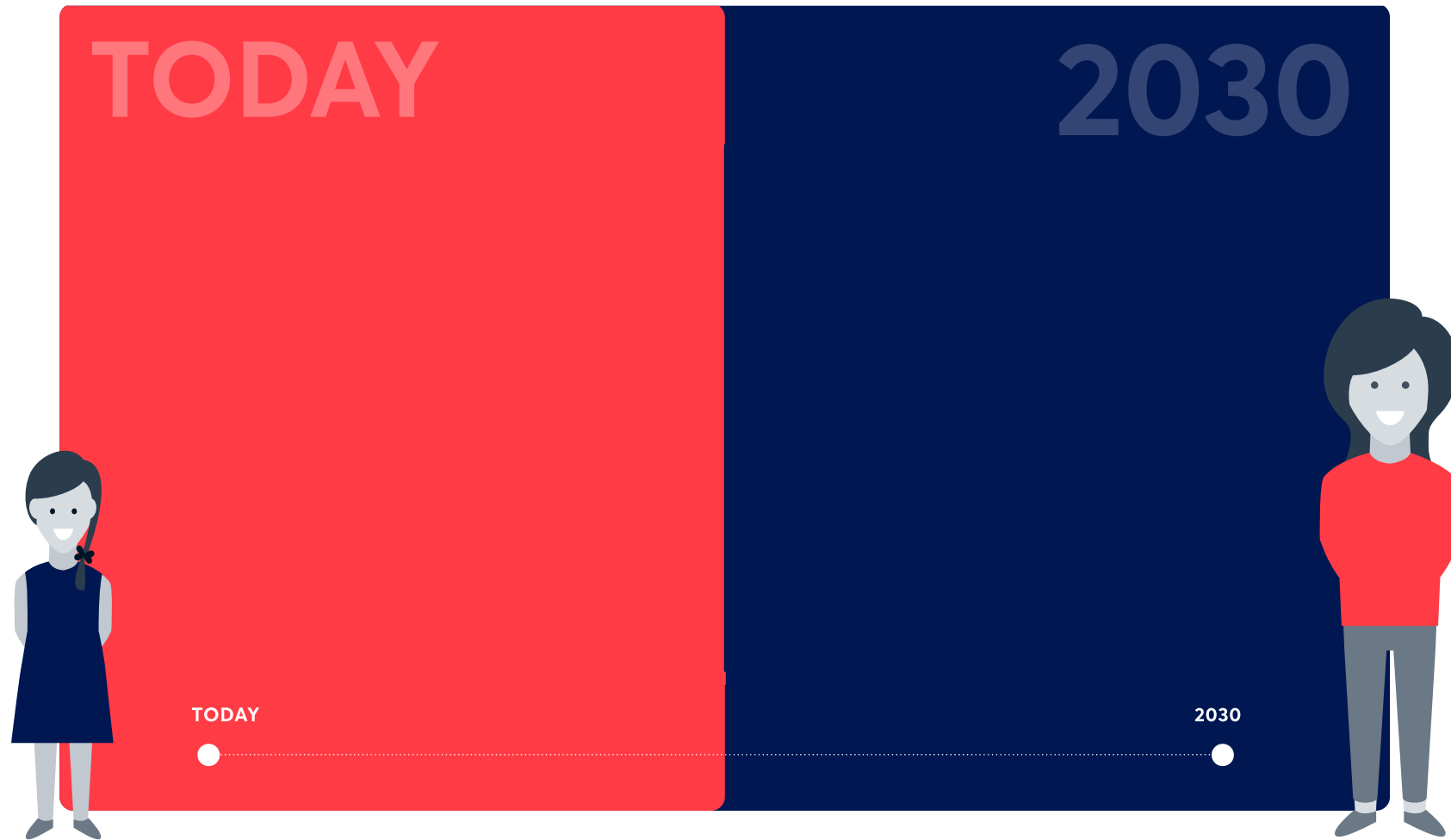




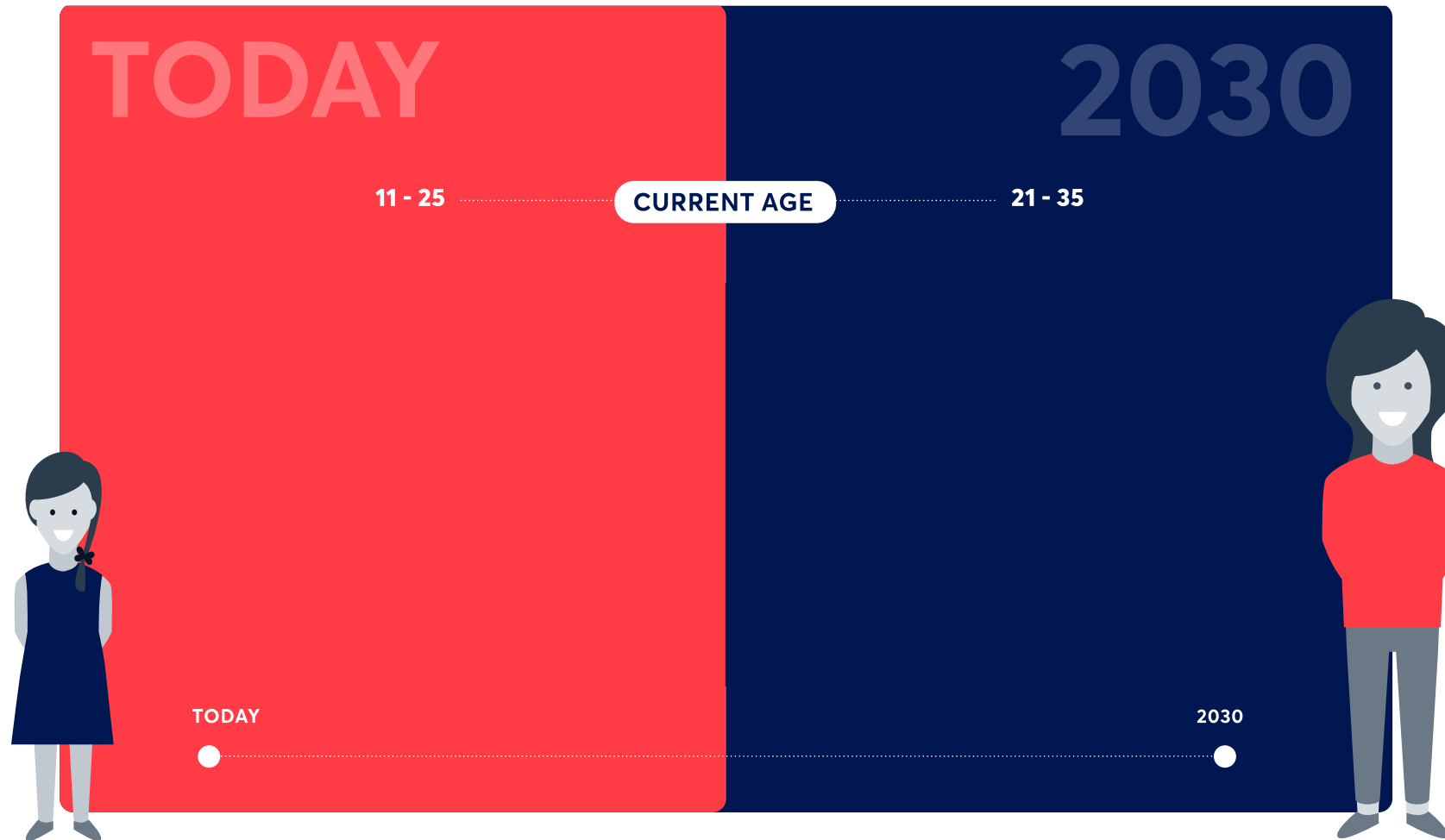
# Generation Z



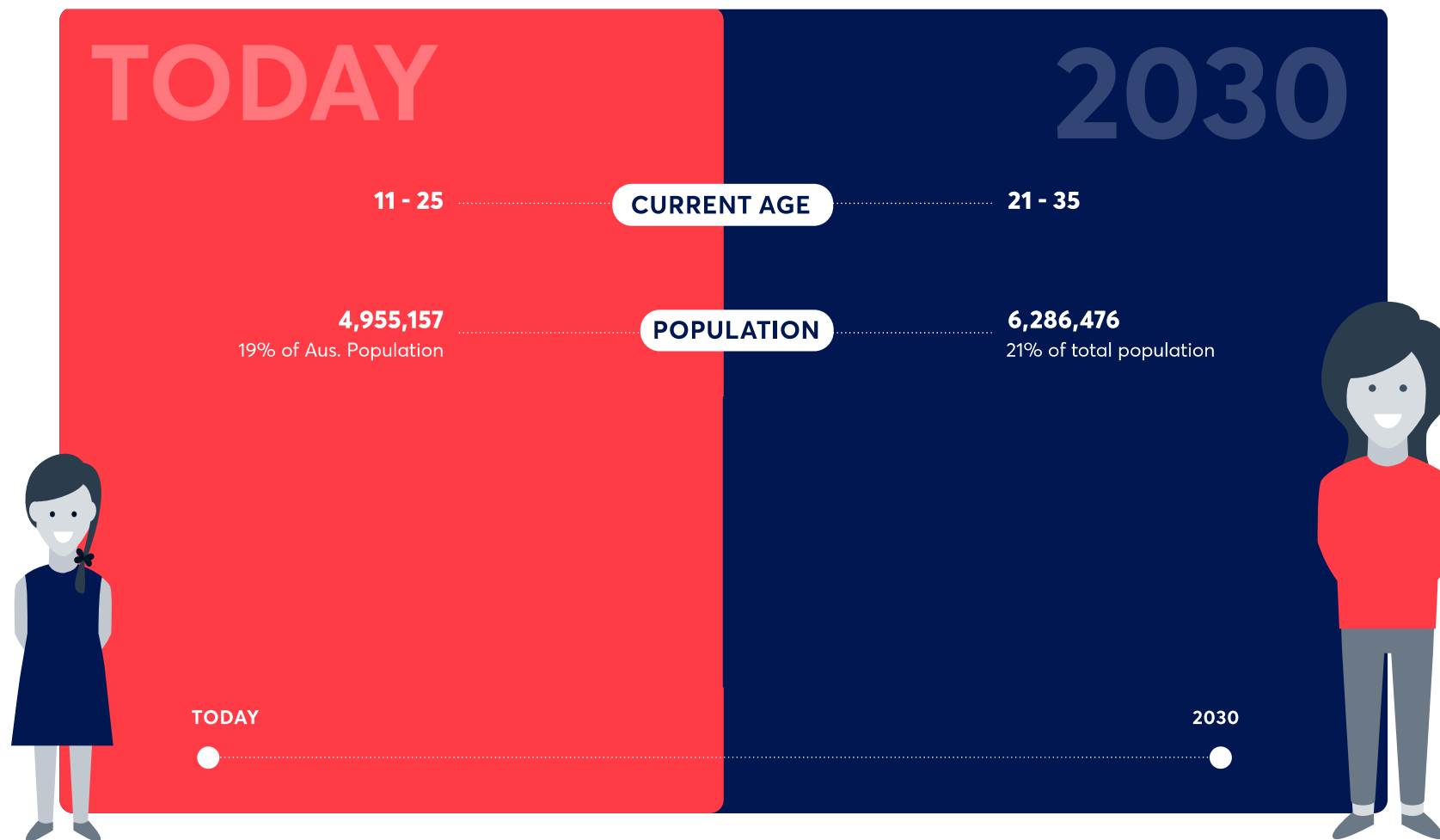
# Demographic profile



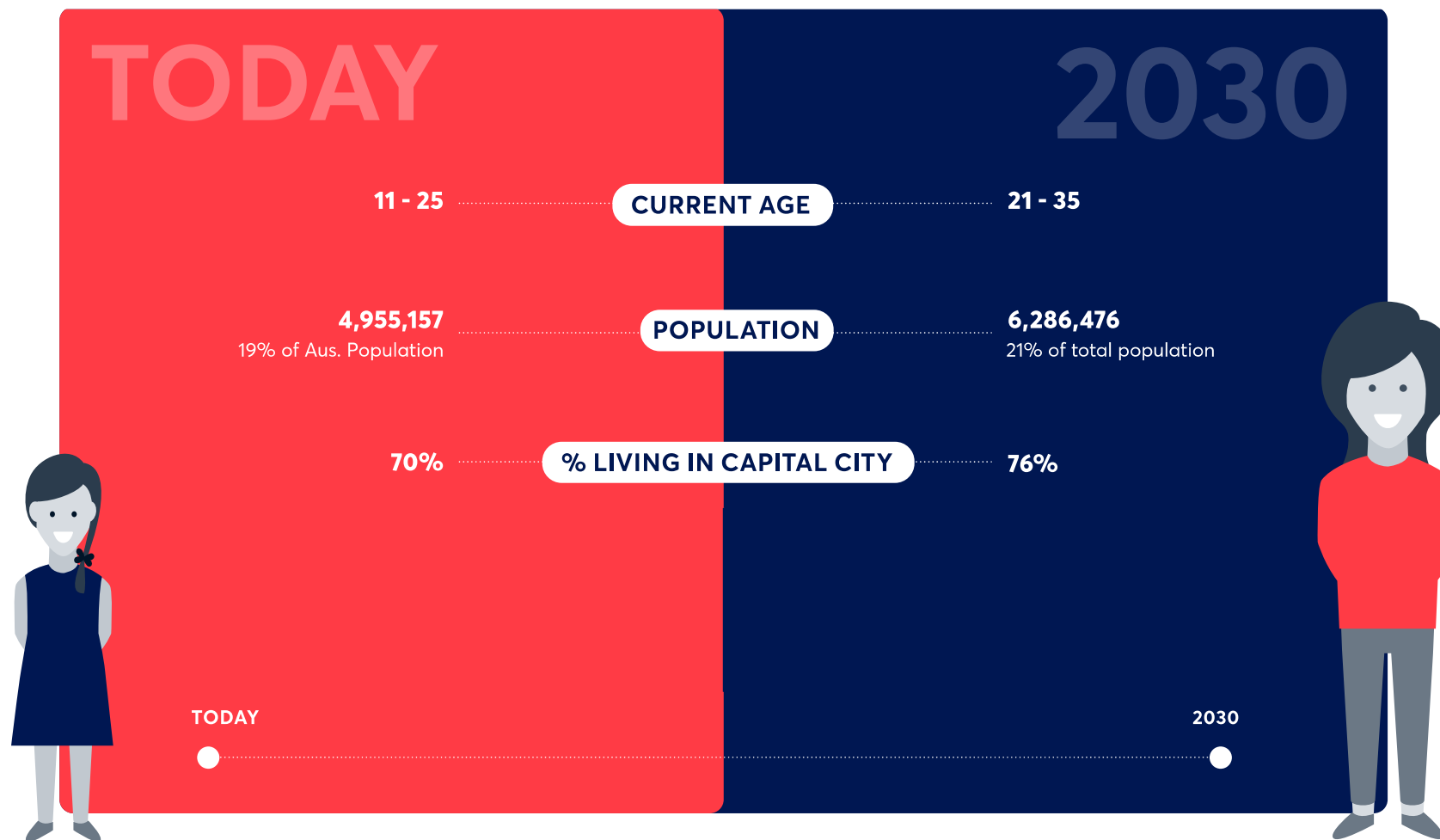
# Demographic profile



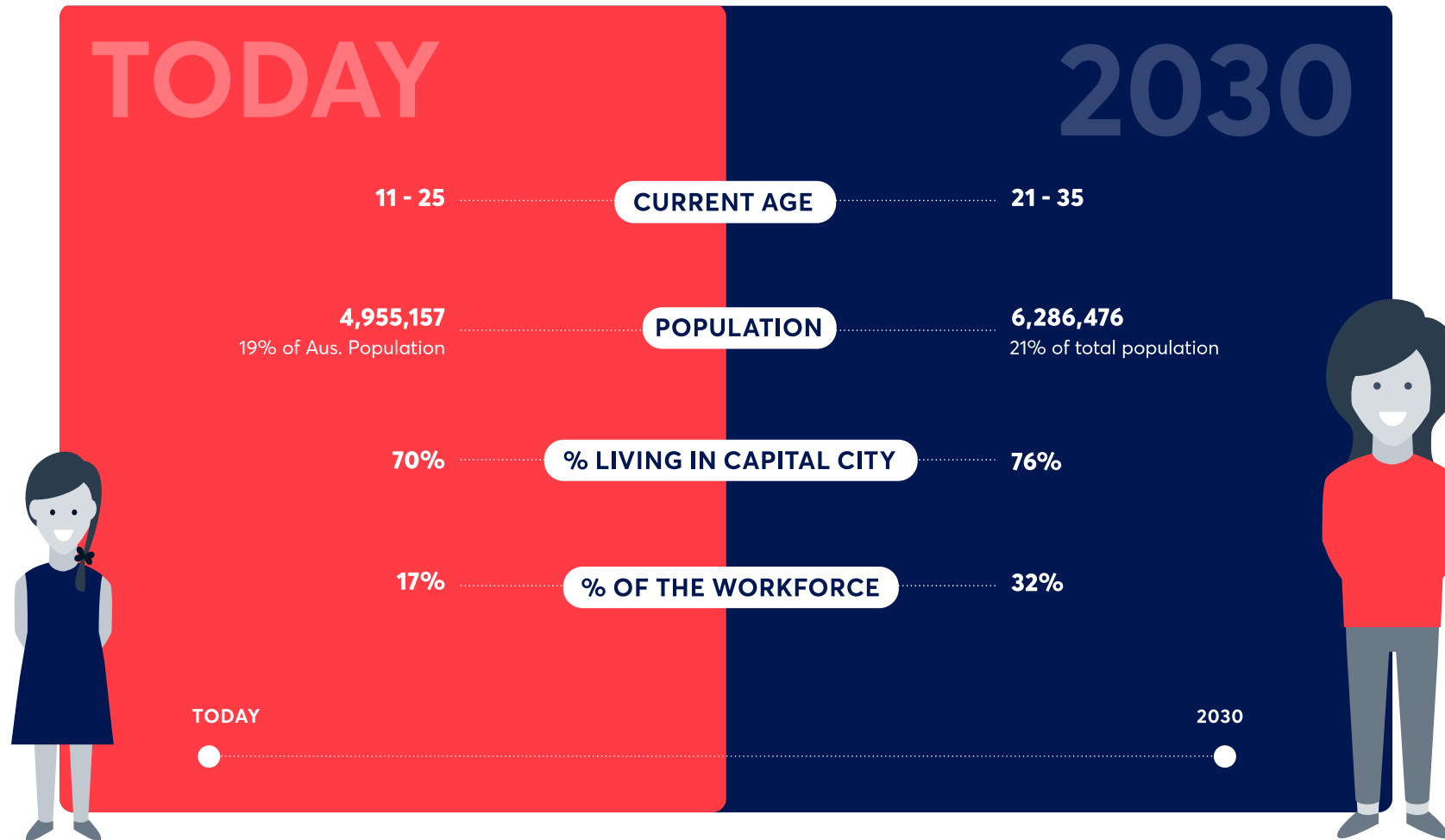
# Demographic profile



# Demographic profile



# Demographic profile



# Digital integrators

# Digital integrators



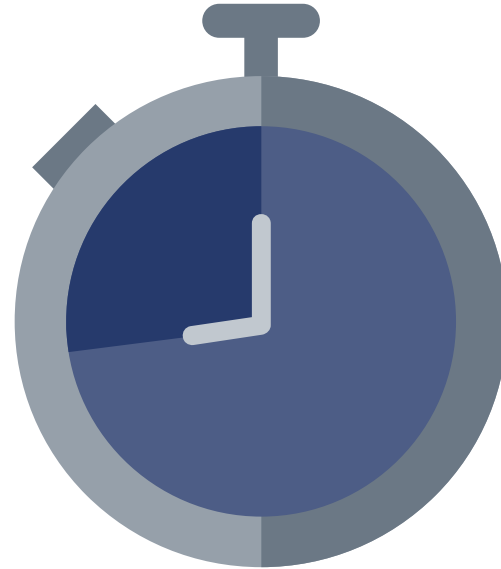
**95%**

OF GEN Z OWN A SMARTPHONE<sup>1</sup>

<sup>1</sup>2018, Smartphone ownership in Australia, Statista



# Digital integrators



**74%**

OF GEN Z'S AVERAGE TIME IS SPENT  
ONLINE (OUTSIDE OF SCHOOL OR WORK)<sup>1</sup>

<sup>1</sup>2017, Commscope 'The Generation Z Study of Tech Intimates Reveals and Always-On Mindset, Commscope

# 3 biggest fears of this generation

# 3 biggest fears of this generation



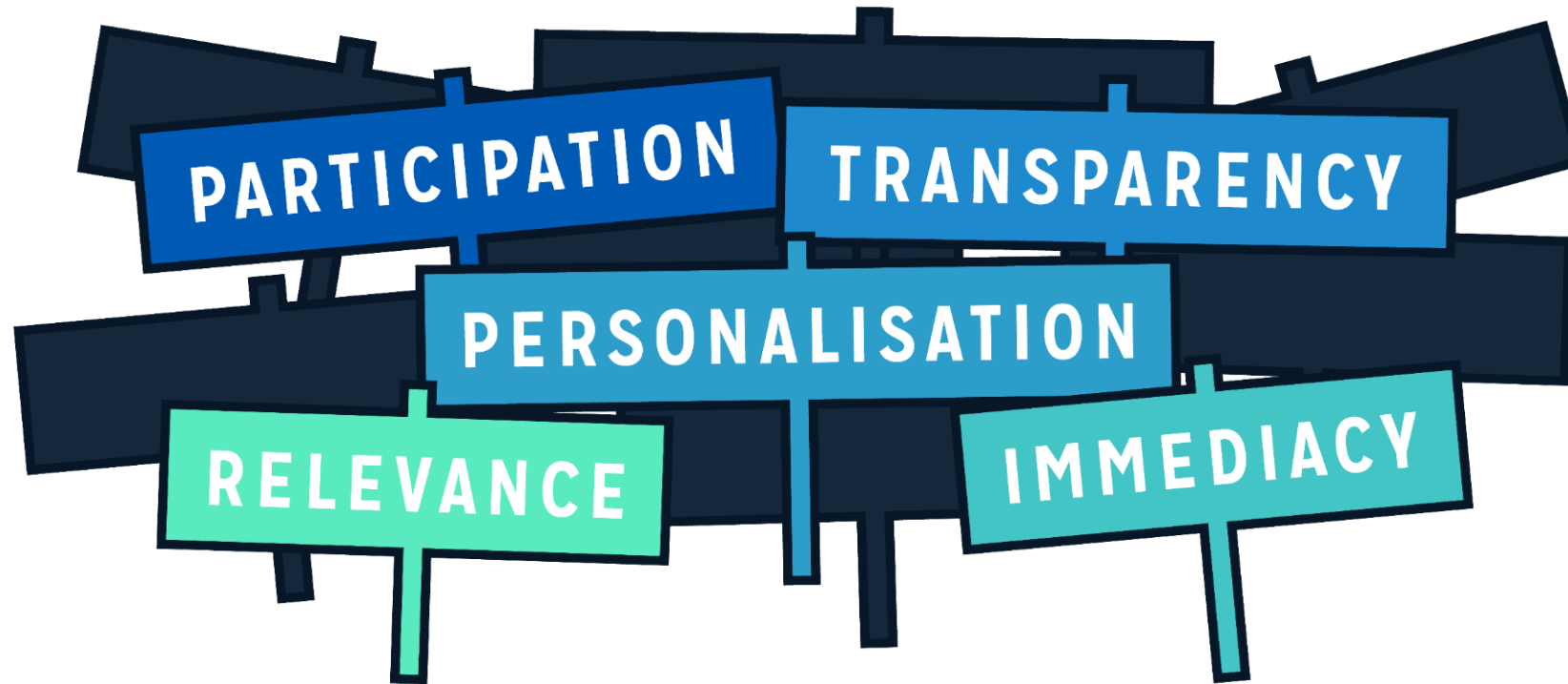
# 3 biggest fears of this generation



# 3 biggest fears of this generation



# Expectation inflation



# Global connections and social influence

# Global connections and social influence



**73%**

OF GEN Z WOULD MAKE A PURCHASE  
BASED ON A SOCIAL MEDIA  
RECOMMENDATION<sup>1</sup>

<sup>1</sup>2018, Gen Z Spending Habits: an Infographic, Alabama Media Group



# Visual communication is an expectation

<sup>1</sup>2018, Teens, Social Media & Technology 2018, Pew Research Center

# Visual communication is an expectation

## TOP SOCIAL MEDIA PLATFORM BY USAGE OF TEENAGERS<sup>1</sup>

<sup>1</sup>2018, Teens, Social Media & Technology 2018, Pew Research Center

# Visual communication is an expectation

TOP SOCIAL MEDIA  
PLATFORM  
BY USAGE OF  
TEENAGERS<sup>1</sup>



**85% YOUTUBE**

<sup>1</sup>2018, Teens, Social Media & Technology 2018, Pew Research Center

# Visual communication is an expectation

TOP SOCIAL MEDIA  
PLATFORM  
BY USAGE OF  
TEENAGERS<sup>1</sup>



**85% YOUTUBE**



**72% INSTAGRAM**

<sup>1</sup>2018, Teens, Social Media & Technology 2018, Pew Research Center

# Visual communication is an expectation

TOP SOCIAL MEDIA  
PLATFORM  
BY USAGE OF  
TEENAGERS<sup>1</sup>



**85% YOUTUBE**



**72% INSTAGRAM**

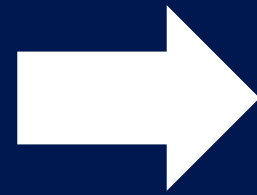


**69% SNAPCHAT**

<sup>1</sup>2018, Teens, Social Media & Technology 2018, Pew Research Center

Google

Google





TIKTOK



# TL;DR



# Sustainability as a lifestyle

# Sustainability as a lifestyle



**55%**

TAKEN STEPS TO  
REDUCE THEIR OWN  
USE OF SINGLE-USE  
PLASTICS

<sup>1</sup>Deloitte, Global Millennial Survey, 2020

# Sustainability as a lifestyle



**55%**

TAKEN STEPS TO  
REDUCE THEIR OWN  
USE OF SINGLE-USE  
PLASTICS



**42%**

INCREASED THEIR  
PURCHASE OF ORGANIC  
AND/OR LOCALLY  
PRODUCED FOOD

<sup>1</sup>Deloitte, Global Millennial Survey, 2020

# Sustainability as a lifestyle



**55%**

TAKEN STEPS TO  
REDUCE THEIR OWN  
USE OF SINGLE-USE  
PLASTICS



**42%**

INCREASED THEIR  
PURCHASE OF ORGANIC  
AND/OR LOCALLY  
PRODUCED FOOD



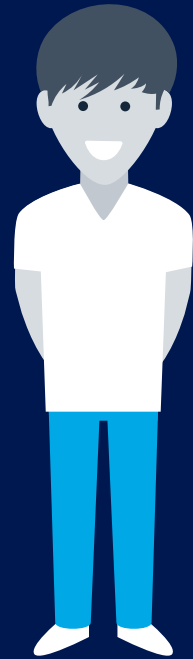
**41%**

STOPPED/REDUCED THE  
REGULARITY IN WHICH  
THEY PURCHASE 'FAST  
FASHION' <sup>1</sup>

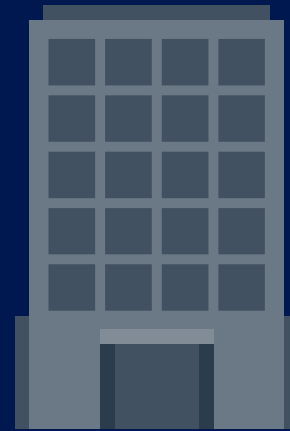
<sup>1</sup>Deloitte, Global Millennial Survey, 2020

# Mobility and flexibility

# Mobility and flexibility



**Gen Z**  
Age: 11-25



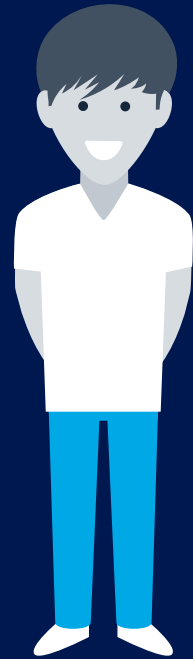
**18**  
jobs

**In a lifetime**



**6**  
careers

# Mobility and flexibility

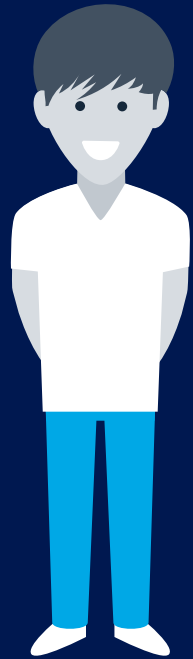


**Gen Z**  
Age: 11-25

**K  
I  
P  
P  
E  
R  
S**



# Mobility and flexibility



**Gen Z**

Age: 11-25

**Kids  
In  
Parents  
Pockets  
Eroding  
Retirement  
Savings**

# Generation Alpha



**THAT MOMENT YOU SECURE YOUR**



**WIGGLES TICKETS!**

# The voice that shapes the future

# The voice that shapes the future

BY 2030, GEN ALPHA WILL  
COMPRISE



**6%**  
OF THE  
WORKFORCE

# The voice that shapes the future

BY 2030, GEN ALPHA WILL  
COMPRISE

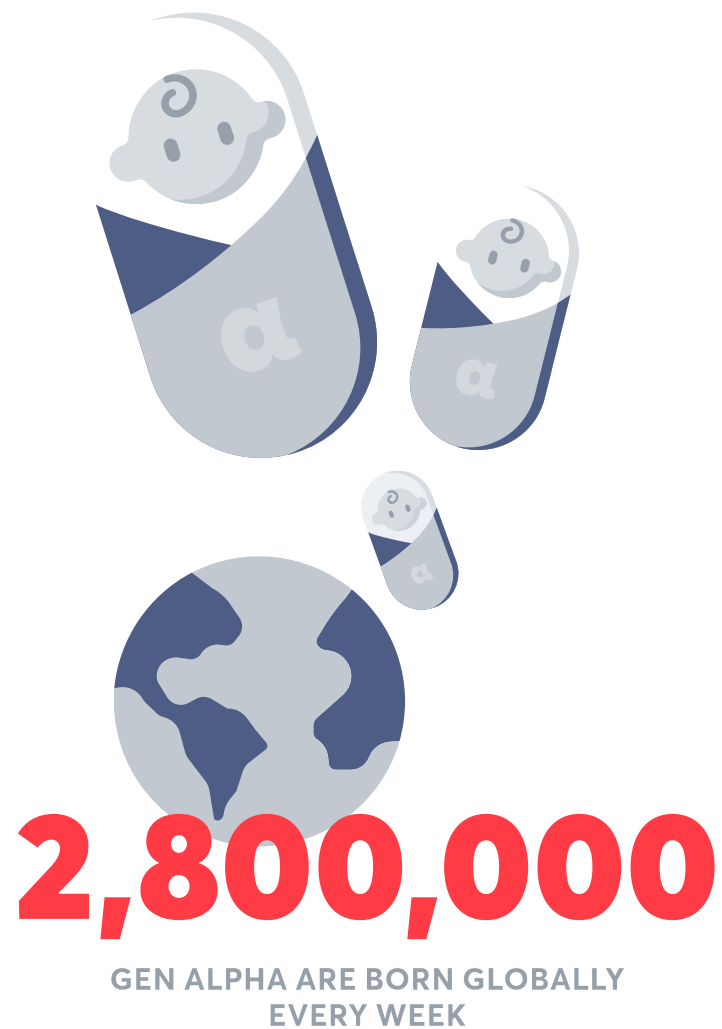


6%  
OF THE  
WORKFORCE

AND ALMOST  
ONE IN FIVE  
AUSTRALIANS



# Generation Alpha



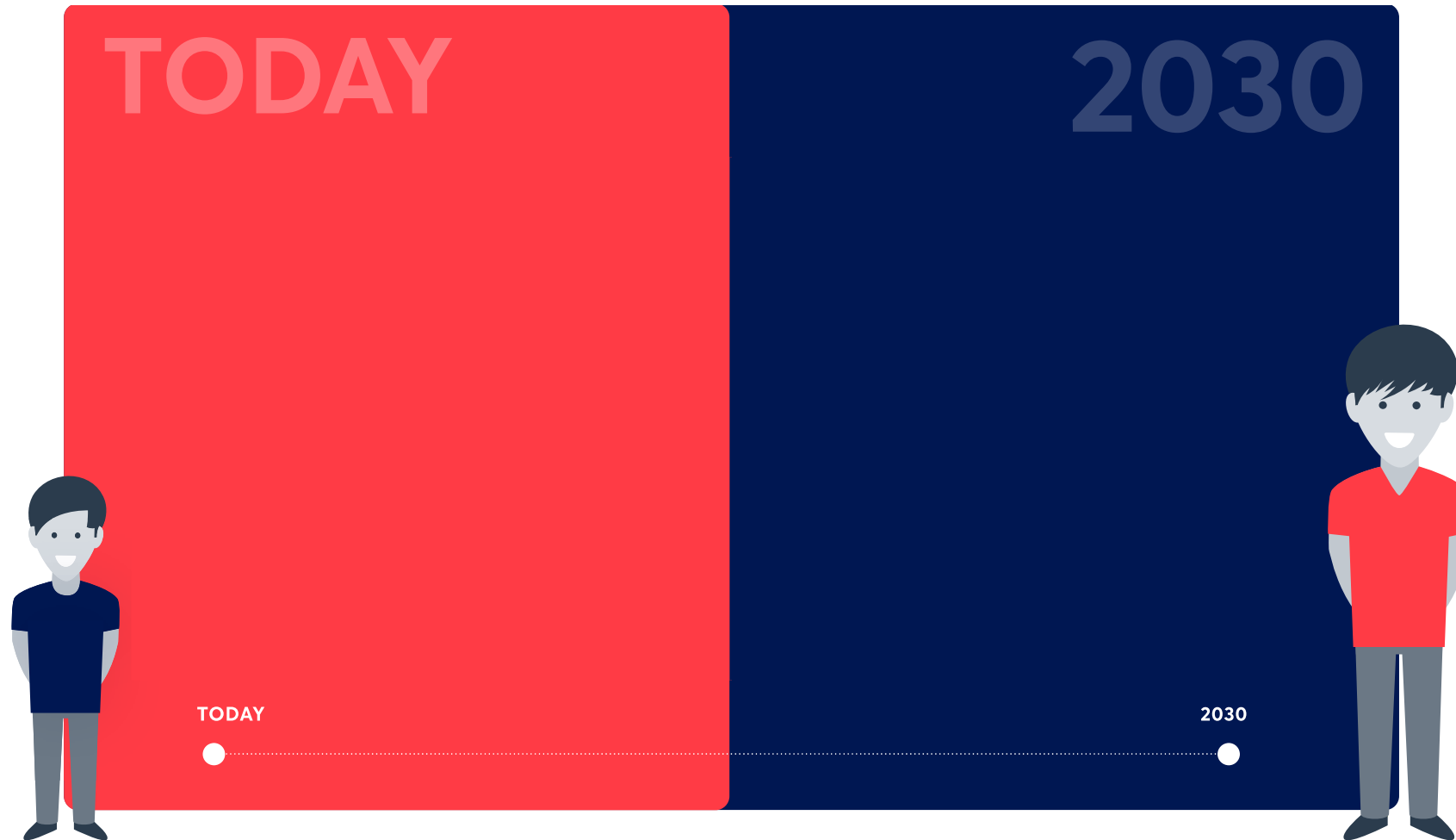
**2,000,000,000**  
**2025**



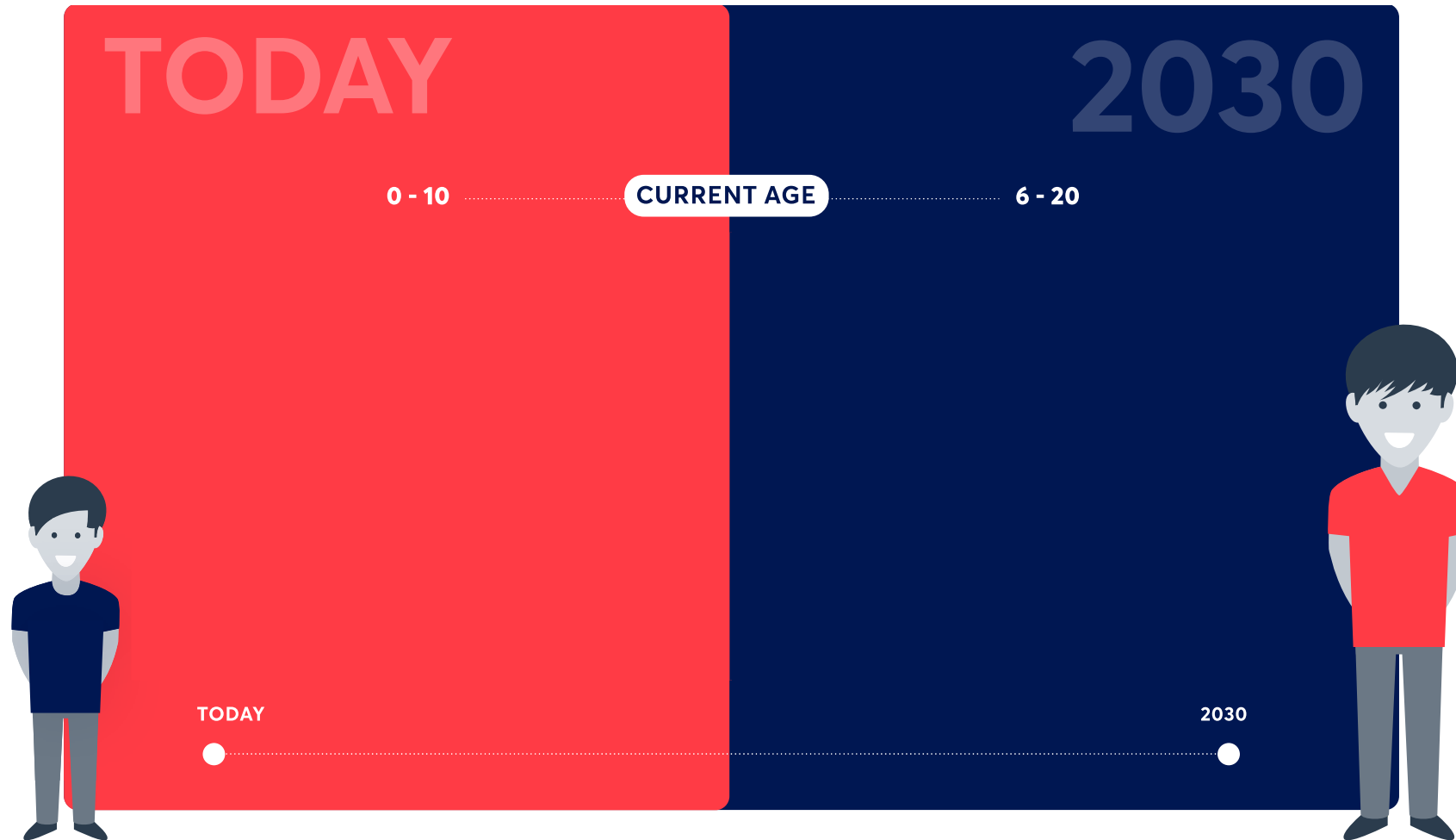
WHEN THEY HAVE ALL BEEN BORN (2025) THEY WILL  
NUMBER MORE THAN TWO BILLION – THE LARGEST  
GENERATION IN THE HISTORY OF THE WORLD



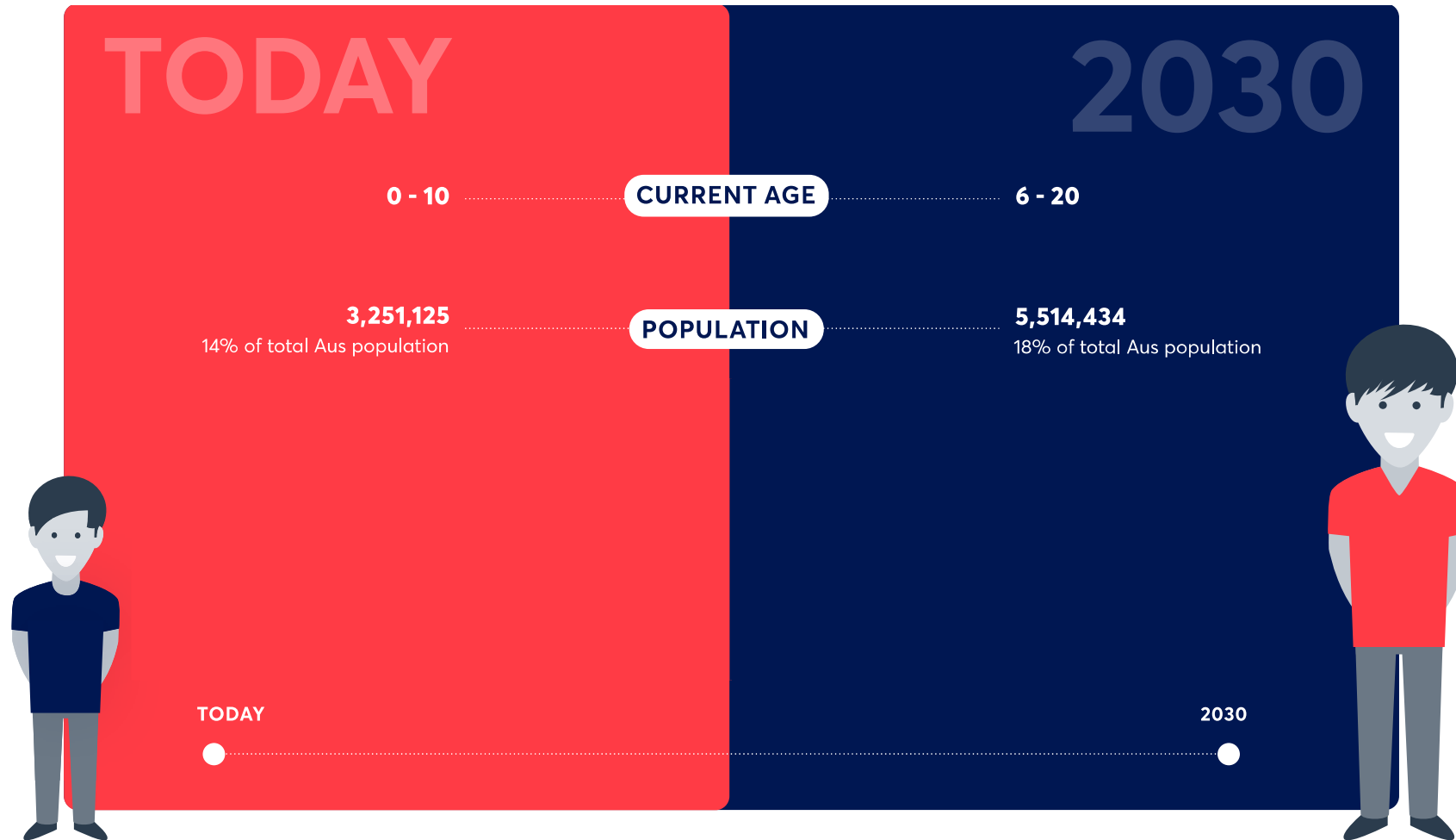
# Demographic profile



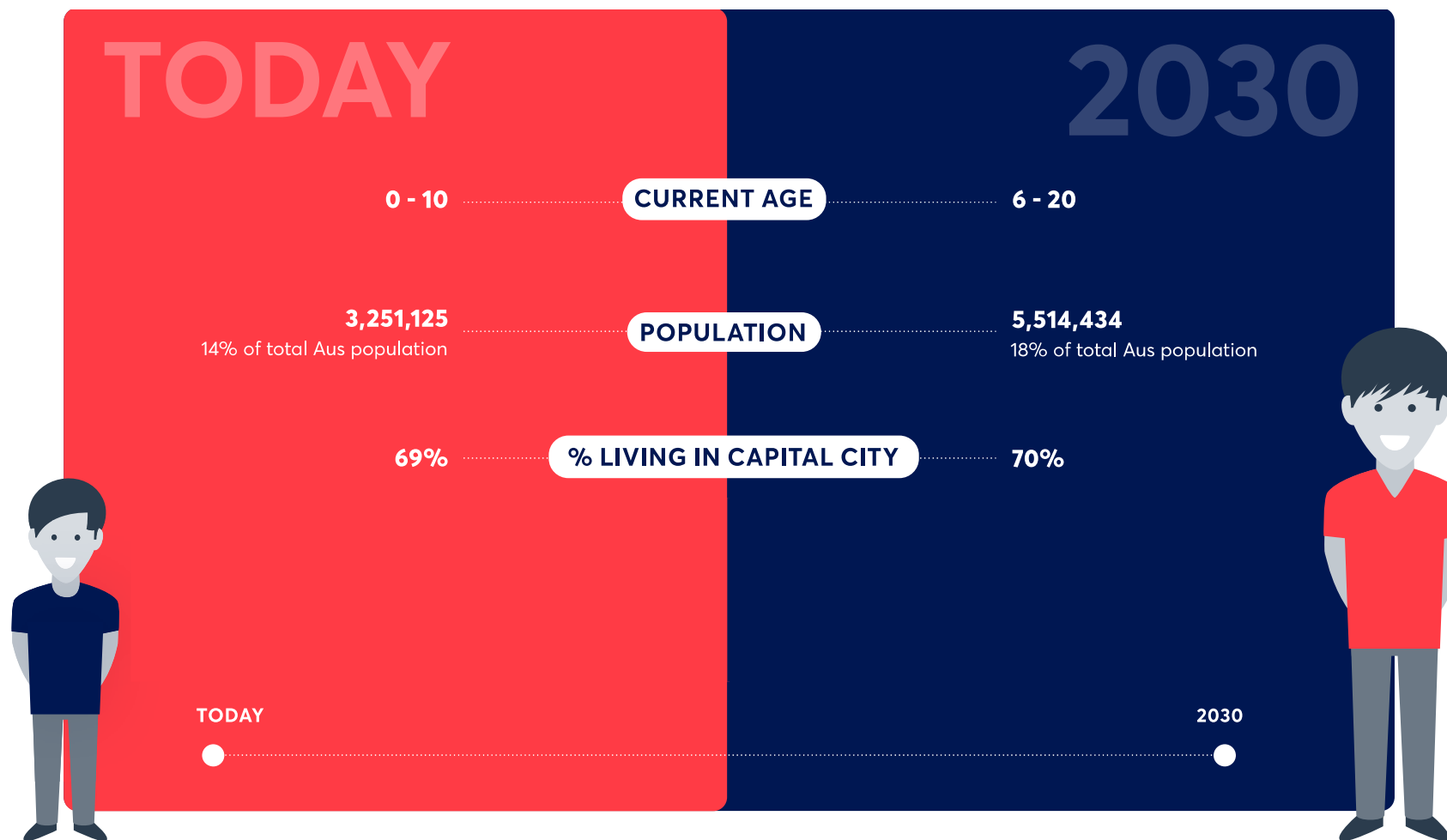
# Demographic profile



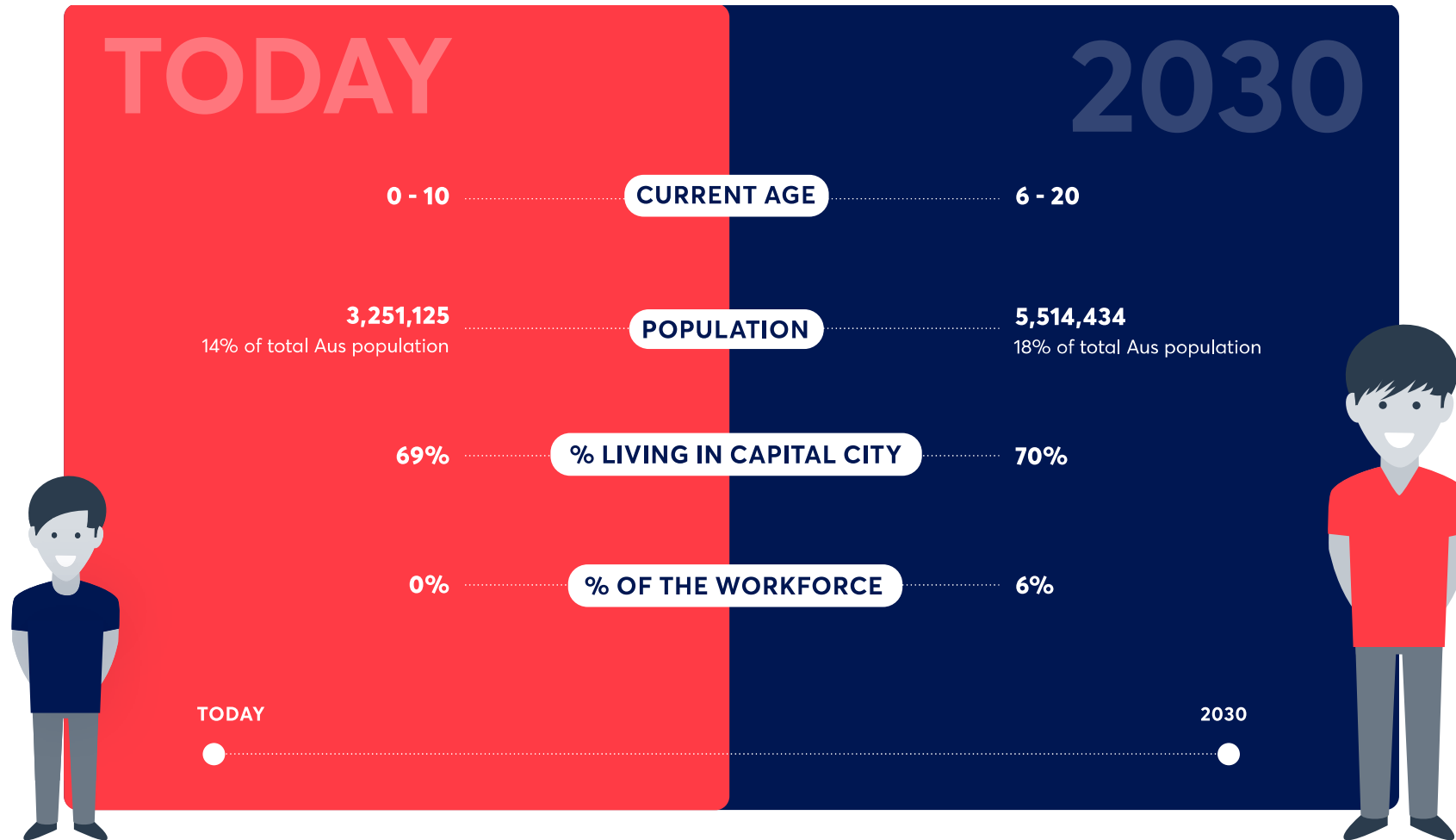
# Demographic profile



# Demographic profile



# Demographic profile





# Shaped by technology

***The age at which we're exposed to a new technology or transformative event determines how embedded it will be in our psyche.***

# Shaped by technology



GEN ALPHA ARE EARLY ADOPTERS WITH  
ONLINE INTERACTION SEAMLESSLY  
INTEGRATED INTO THEIR WORLD.



# Shaped by technology



GEN ALPHA ARE EARLY ADOPTERS WITH ONLINE INTERACTION SEAMLESSLY INTEGRATED INTO THEIR WORLD.



2 IN 5 AUSTRALIAN CHILDREN AGED BETWEEN 6 – 13 OWN OR USE A MOBILE PHONE, WHICH HAS BEEN STEADILY INCREASING SINCE 2013 (41%) .<sup>1</sup>

<sup>1</sup>2020, Kids and mobiles: how Australian children are using mobile phones, Australian Communications and Media Authority

# Impacts: Interaction with technology

# Impacts: Interaction with technology



90%

Believe this experience will cause technology and screens to become more integrated in their lives

# Digital Disruption

65%

of children entering primary school today will ultimately end up working in completely new job types that don't yet exist.

# Outgoing technology for Gen Alpha

Landline  
phone



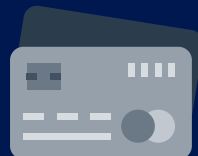
CD/DVD



GPS system



Credit card



Wallet



Analogue  
watch

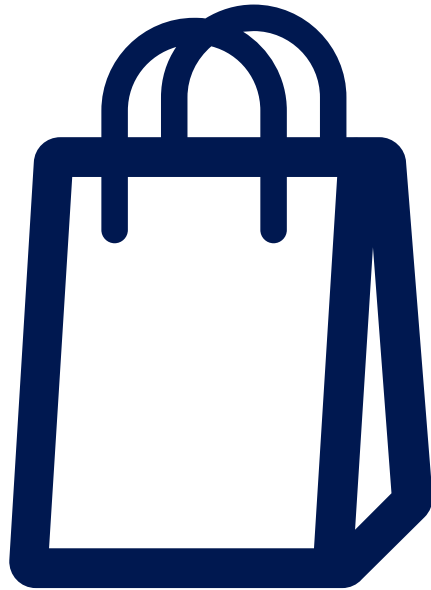


Hey google...



# Influencing household purchasing decisions

# Influencing household purchasing decisions



81%

of parents have had their actions or consumption decisions influenced to be more environmentally aware by their Gen Alpha children.



# Personalisation as an expectation

# Personalisation as an expectation

Generation Y



Descriptive

# Personalisation as an expectation

Generation Y



Descriptive

Generation Z



Customised

# Personalisation as an expectation



***The key characteristic of a leader is foresight. The reason they can lead is that they see things not just as they are, but as they will be.***

A blue-tinted collage of diverse people, including a young boy, a woman in a blazer, a man, a woman in a white top, and an older woman with glasses, serving as the background for the slide.

mccrindle

# The future of cities

**Geoff Brailey**

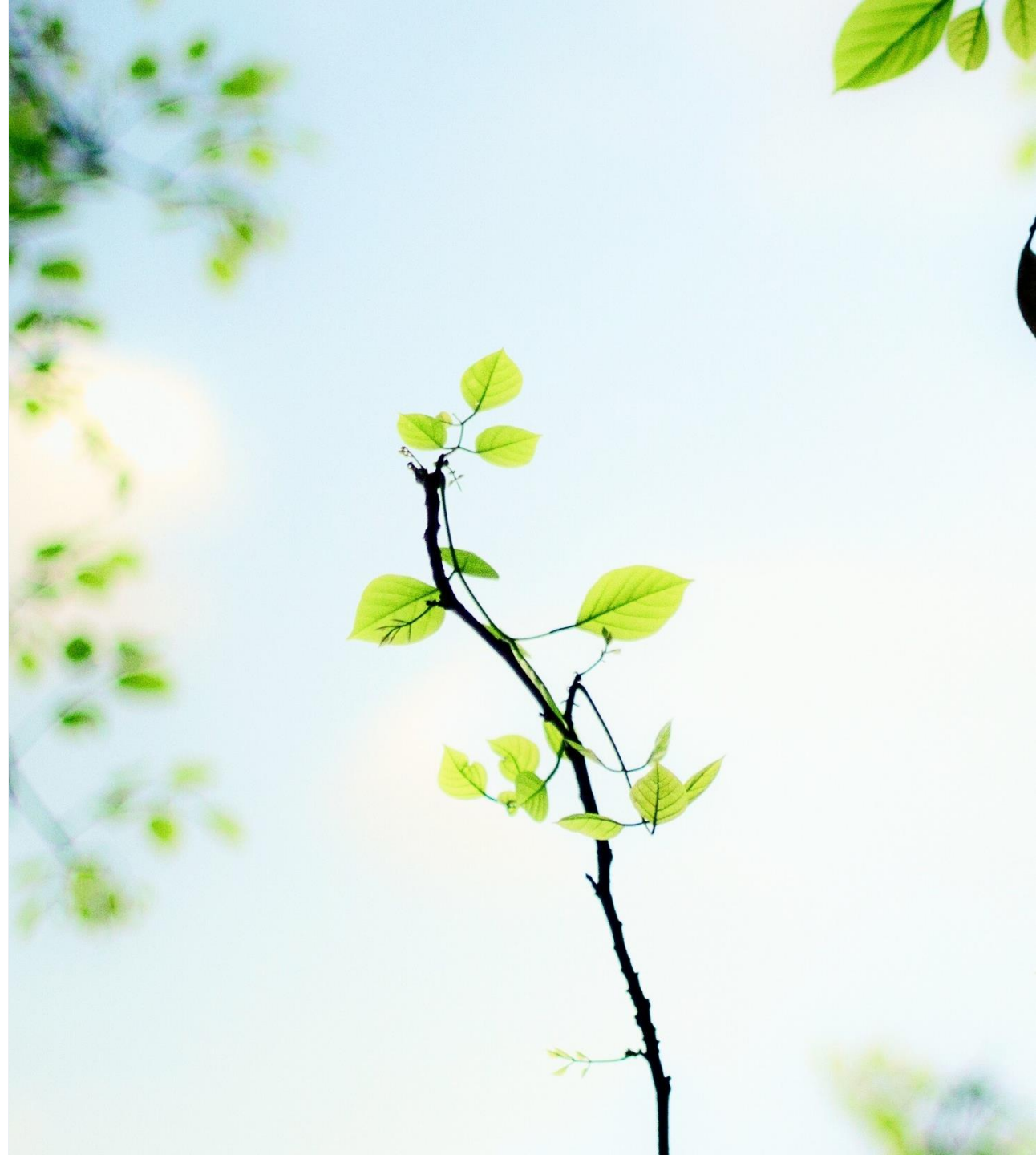
Analyse Australia – Understanding the future consumer  
27th August 2020

T +61 2 8824 3422

E [info@mccrindle.com.au](mailto:info@mccrindle.com.au)

W [mccrindle.com.au](http://mccrindle.com.au)

# Population Growing



# Global population rising

**2020**

Global population: **7,794,798,729**



# Global population rising

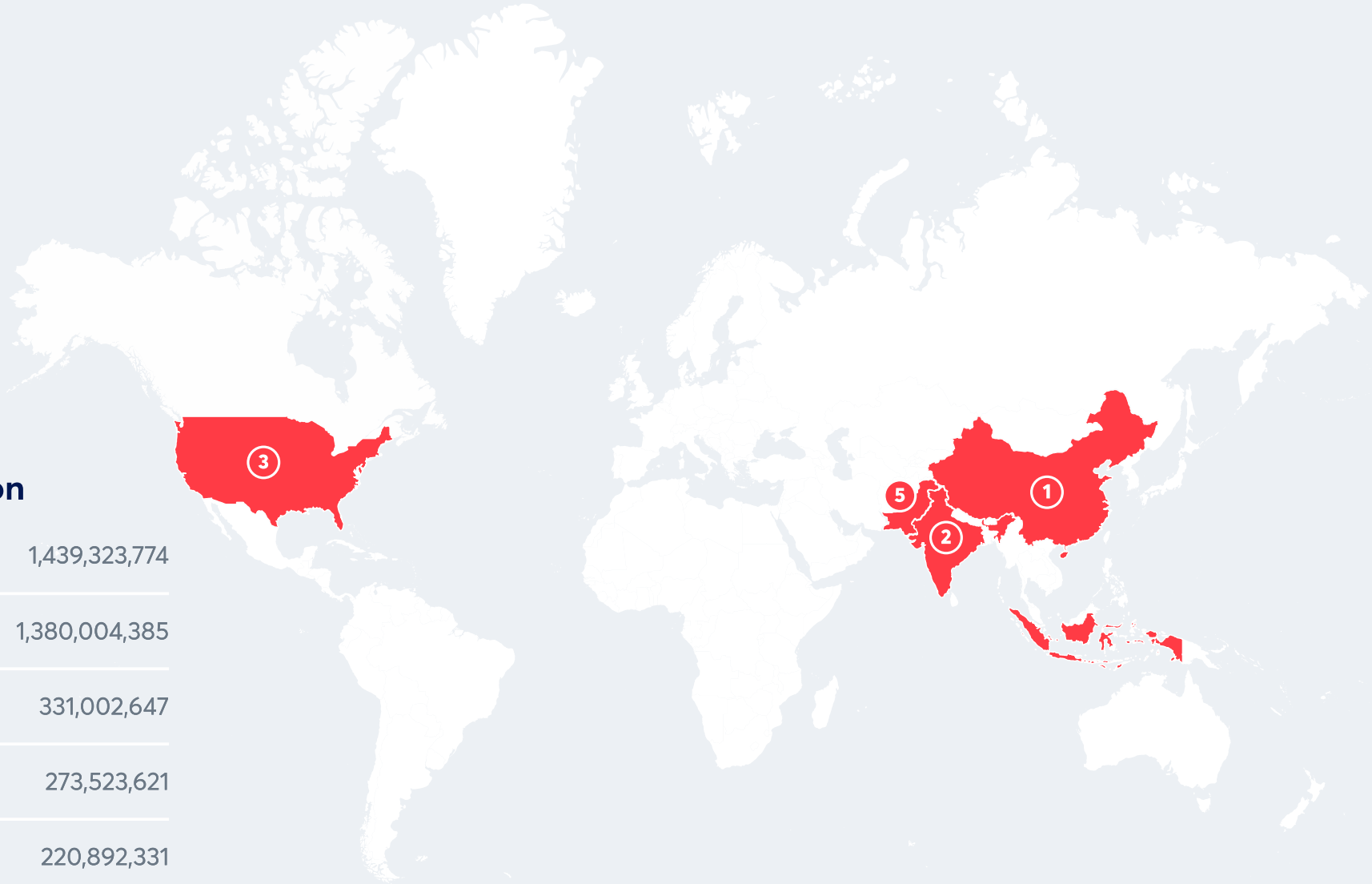
**2020**

Global population: **7,794,798,729**

**2030**

Global population: **8,548,487,371**

# 2020



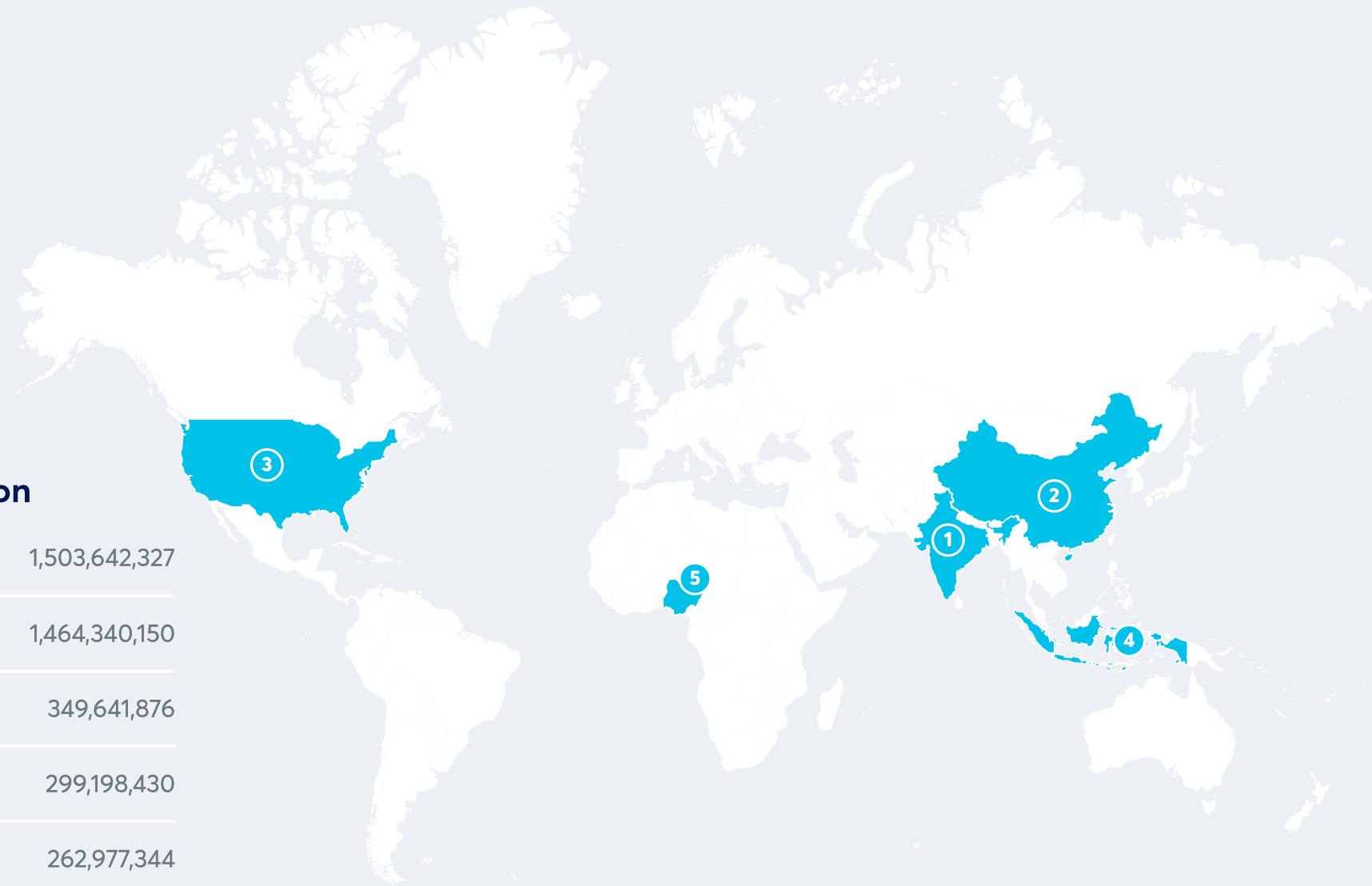
## Top 5 countries by population

1	China	1,439,323,774
2	India	1,380,004,385
3	United States of America	331,002,647
4	Indonesia	273,523,621
5	Pakistan	220,892,331

# 2030

## Top 5 countries by population

1	India	1,503,642,327
2	China	1,464,340,150
3	United States of America	349,641,876
4	Indonesia	299,198,430
5	Nigeria	262,977,344



# 2020

## % of continent by generation

	Africa	Asia	Europe	South America	North America	Oceania
Alpha	31%	17%	12%	17%	13%	18%
Z	30%	23%	16%	25%	19%	22%
Y	20%	23%	20%	23%	21%	21%
X	11%	19%	21%	18%	19%	18%
Boomers/ Builders	8%	17%	31%	17%	28%	22%

# 2020

## % of continent by generation

	Africa	Asia	Europe	South America	North America	Oceania
Alpha	31%	17%	12%	17%	13%	18%
Z	30%	23%	16%	25%	19%	22%
Y	20%	23%	20%	23%	21%	21%
X	11%	19%	21%	18%	19%	18%
Boomers/ Builders	8%	17%	31%	17%	28%	22%

# 2020

## % of continent by generation

	Africa	Asia	Europe	South America	North America	Oceania
Alpha	31%	17%	12%	17%	13%	18%
Z	30%	23%	16%	25%	19%	22%
Y	20%	23%	20%	23%	21%	21%
X	11%	19%	21%	18%	19%	18%
Boomers/ Builders	8%	17%	31%	17%	28%	22%

# 2020

% of continent by generation

	Africa	Asia	Europe	South America	North America	Oceania
<b>Alpha</b>	31%	17%	12%	17%	13%	18%
<b>Z</b>	30%	23%	16%	25%	19%	22%
<b>Y</b>	20%	23%	20%	23%	21%	21%
<b>X</b>	11%	19%	21%	18%	19%	18%
<b>Boomers/ Builders</b>	8%	17%	31%	17%	28%	22%

# 2030

% of continent by generation

	Africa	Asia	Europe	South America	North America	Oceania
<b>Beta</b>	16%	8%	6%	8%	7%	9%
<b>Alpha</b>	34%	22%	16%	22%	17%	22%
<b>Z</b>	23%	21%	16%	22%	20%	20%
<b>Y</b>	15%	21%	20%	21%	20%	19%
<b>X</b>	8%	17%	20%	16%	17%	15%
<b>BB</b>	4%	11%	22%	11%	19%	14%

# Top 10 cities in the world

Rank	City	Ratings	Country
1	Vienna	99.1	Austria
2	Melbourne	98.4	Australia
3	Sydney	98.1	Australia
4	Osaka	97.7	Japan
5	Calgary	97.5	Canada
6	Vancouver	97.3	Canada
7	Tokyo	97.2	Japan
8	Toronto	97.2	Canada
9	Copenhagen	96.8	Denmark
10	Adelaide	96.6	Australia

Economist Intelligence Unit – Global Liveability Ranking



# Top 10 cities in the world

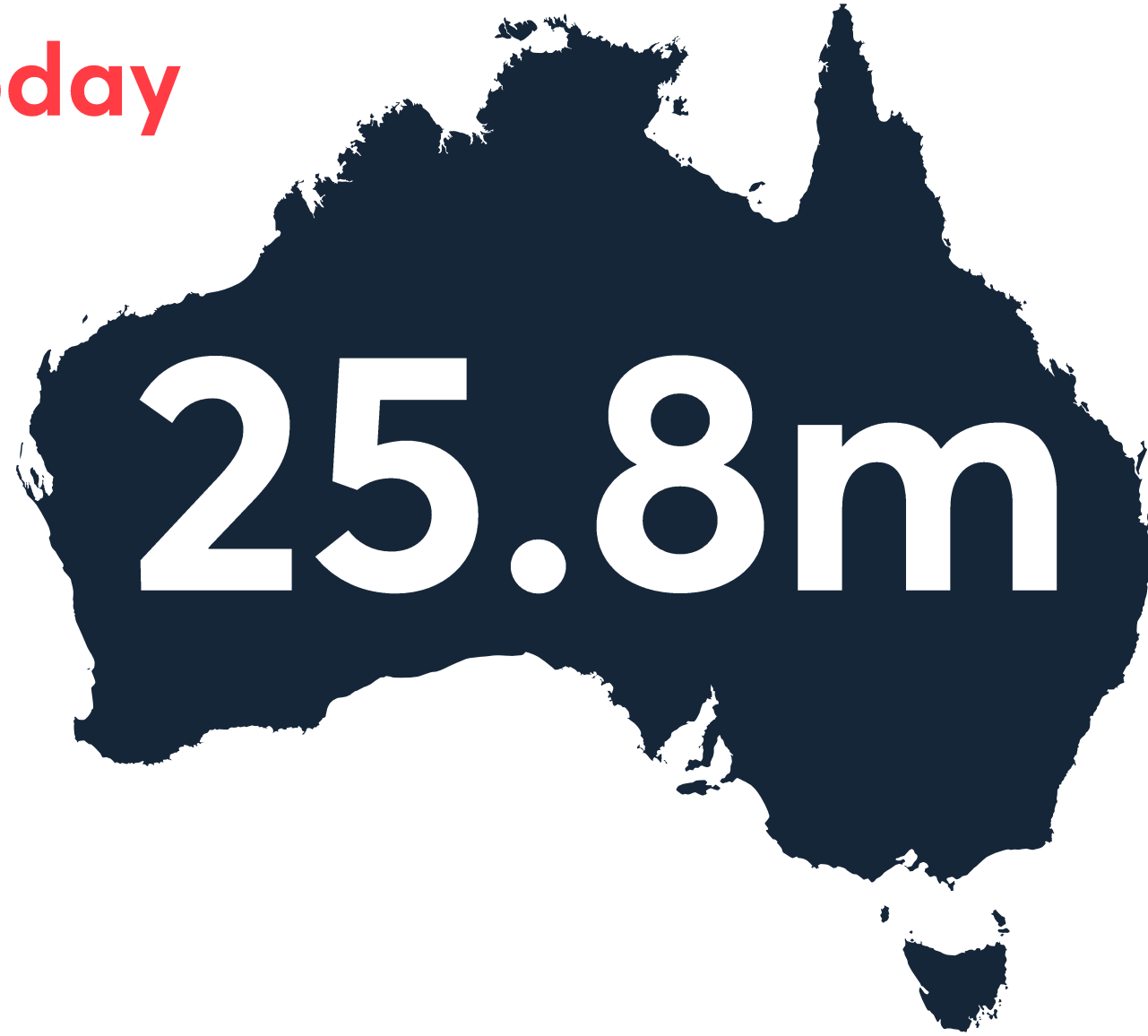
Rank	City	Ratings	Country
1	Vienna	99.1	Austria
2	Melbourne	98.4	Australia
3	Sydney	98.1	Australia
4	Osaka	97.7	Japan
5	Calgary	97.5	Canada
6	Vancouver	97.3	Canada
7	Tokyo	97.2	Japan
8	Toronto	97.2	Canada
9	Copenhagen	96.8	Denmark
10	Adelaide	96.6	Australia

Economist Intelligence Unit – Global Liveability Ranking

# Australia 2011 Census



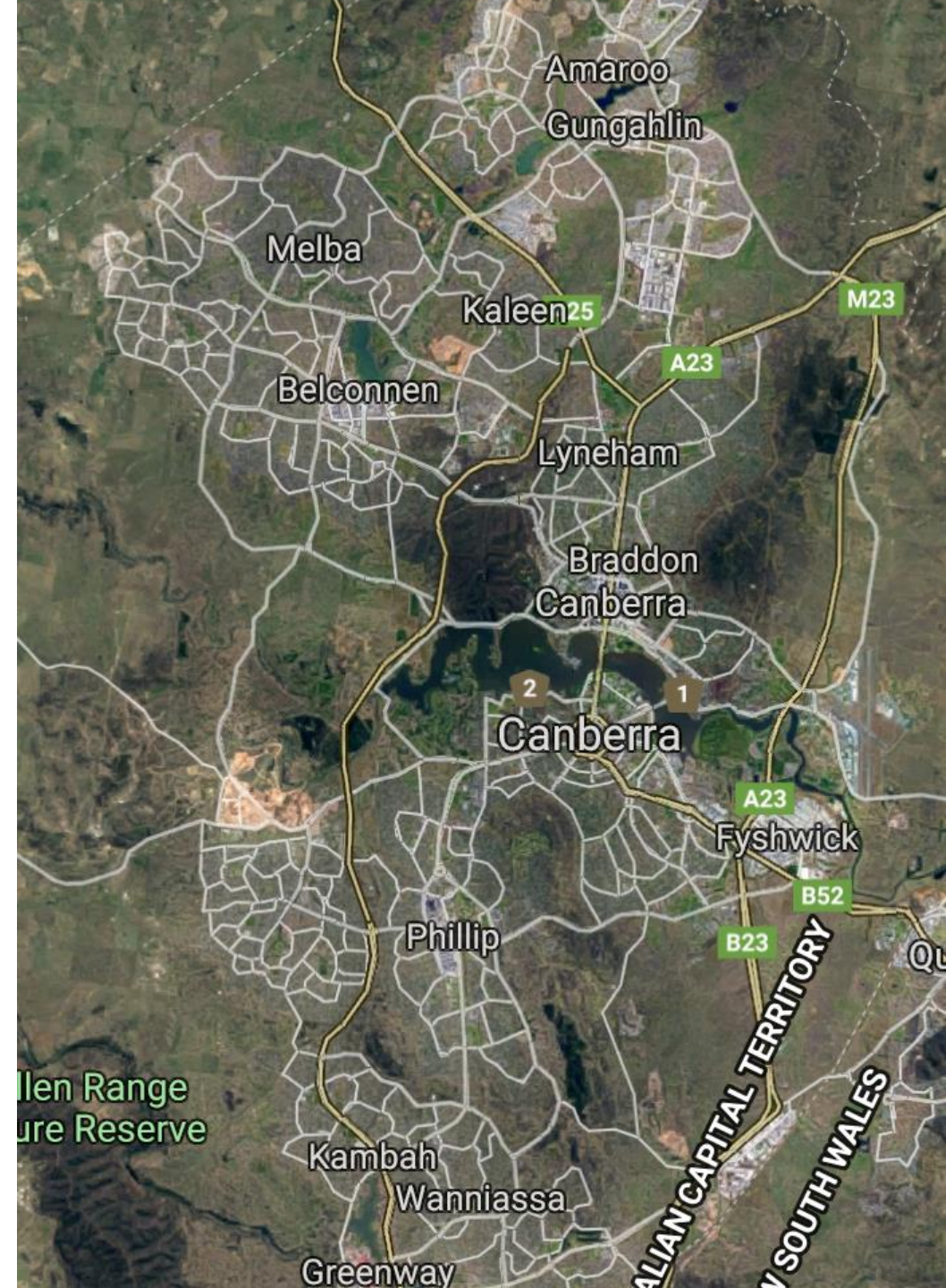
**Australia, today**



**Australia, 2048**

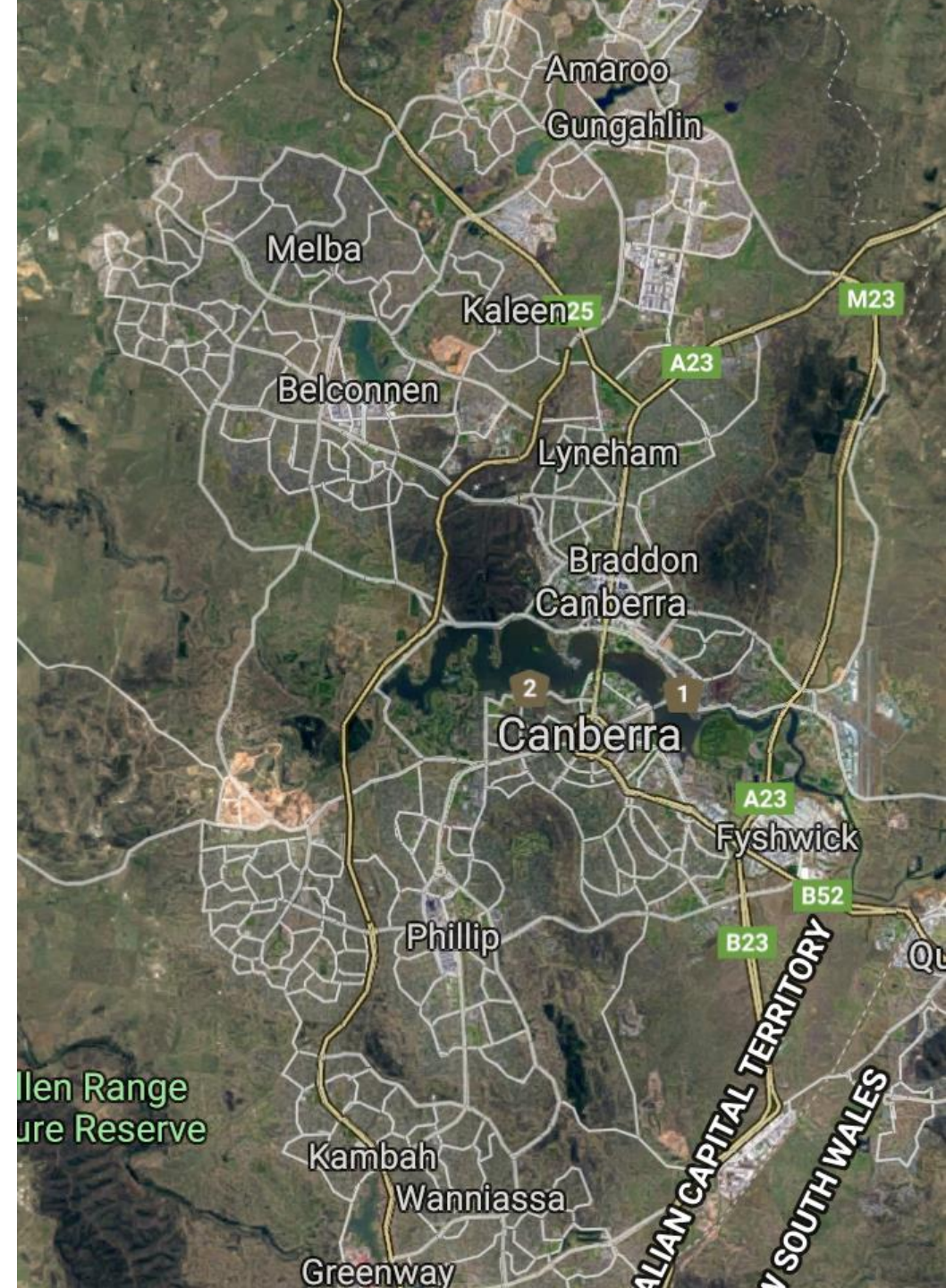


Over the next 30 years,  
Australia will grow by 15  
million people.



**Over the next 30 years,  
Australia will grow by 15  
million people.**

**Equivalent to 36x new  
cities, each the size of  
Canberra (417,000).**



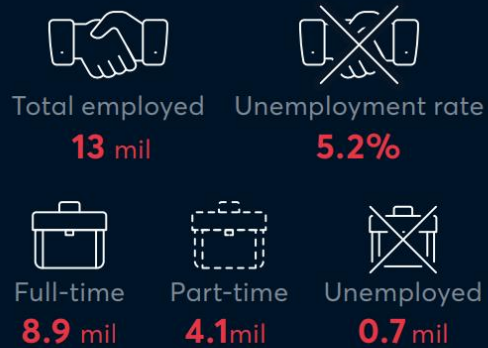


# AUSTRALIA'S POPULATION MAP

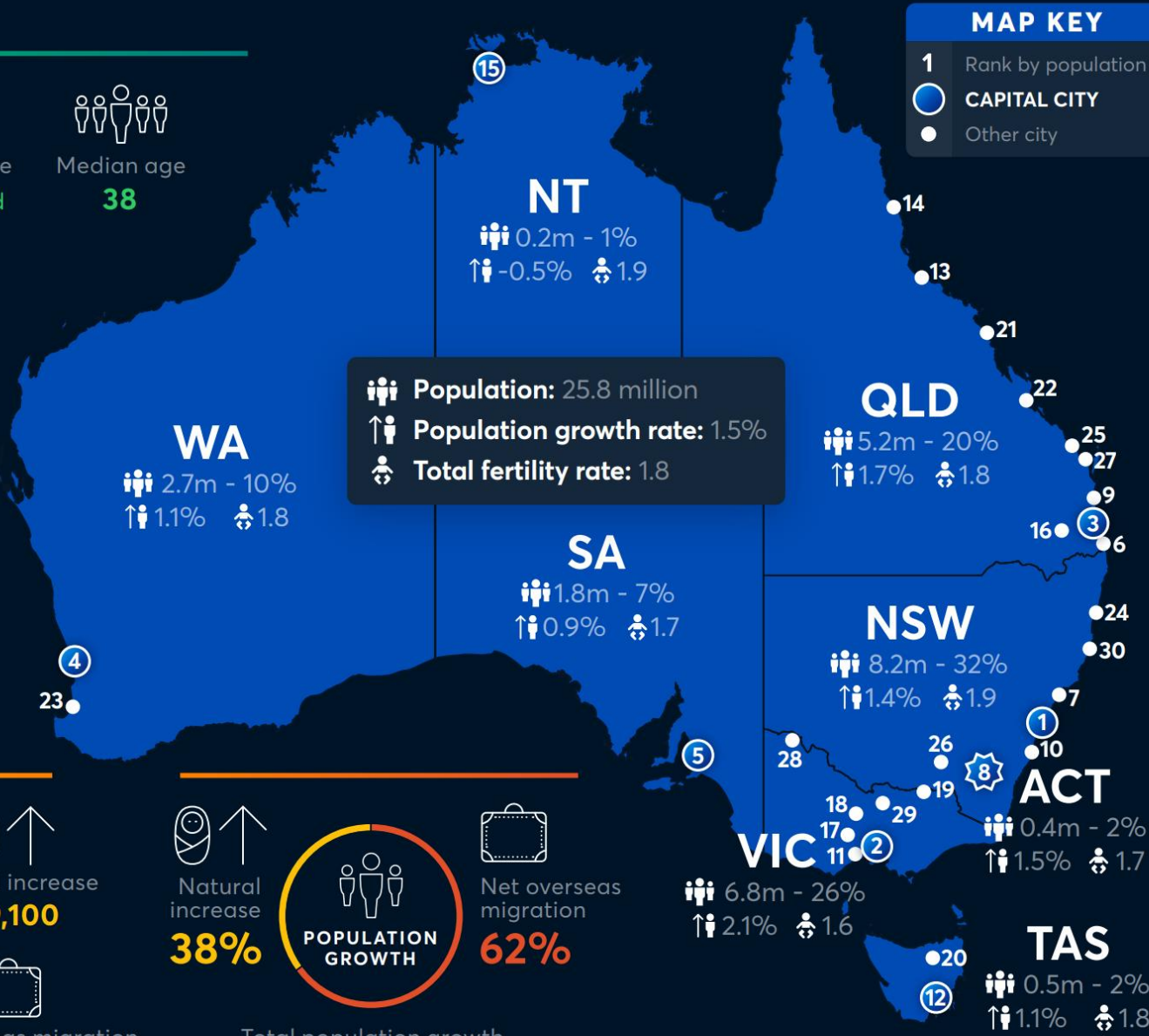
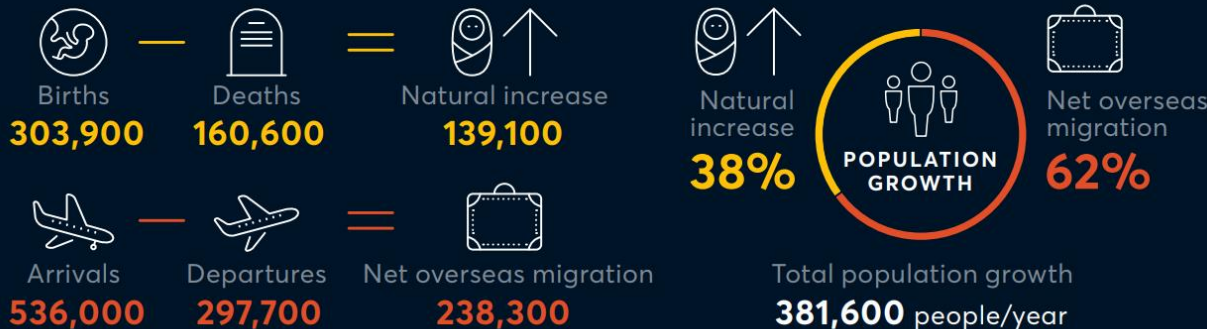
## HOUSEHOLDS



## EMPLOYMENT



## POPULATION



### MAP KEY

- 1 Rank by population
- CAPITAL CITY
- Other city

### CITY BY POPULATION

Rank	CITY	POPULATION
1	SYDNEY	5,422
2	MELBOURNE	5,212
3	BRISBANE	2,566
4	PERTH	2,103
5	ADELAIDE	1,369
6	Gold Coast	714
7	Newcastle	499
8	ACT/CANBERRA	439
9	Sunshine Coast	351
10	Wollongong	311
11	Geelong	283
12	HOBART	239
13	Townsville	183
14	Cairns	156
15	DARWIN	148
16	Toowoomba	140
17	Ballarat	109
18	Bendigo	103
19	Albury - Wodonga	96
20	Launceston	89
21	Mackay	80
22	Rockhampton	79
23	Bunbury	75
24	Coffs Harbour	74
25	Bundaberg	72
26	Wagga Wagga	57
27	Hervey Bay	57
28	Mildura	53
29	Shepparton	53
30	Port Macquarie	50



# Cranes in Australia





SYDNEY

**299 CRANES**

 **28.1% UNITS/APARTMENTS**

**VS**



MELBOURNE

**196 CRANES**

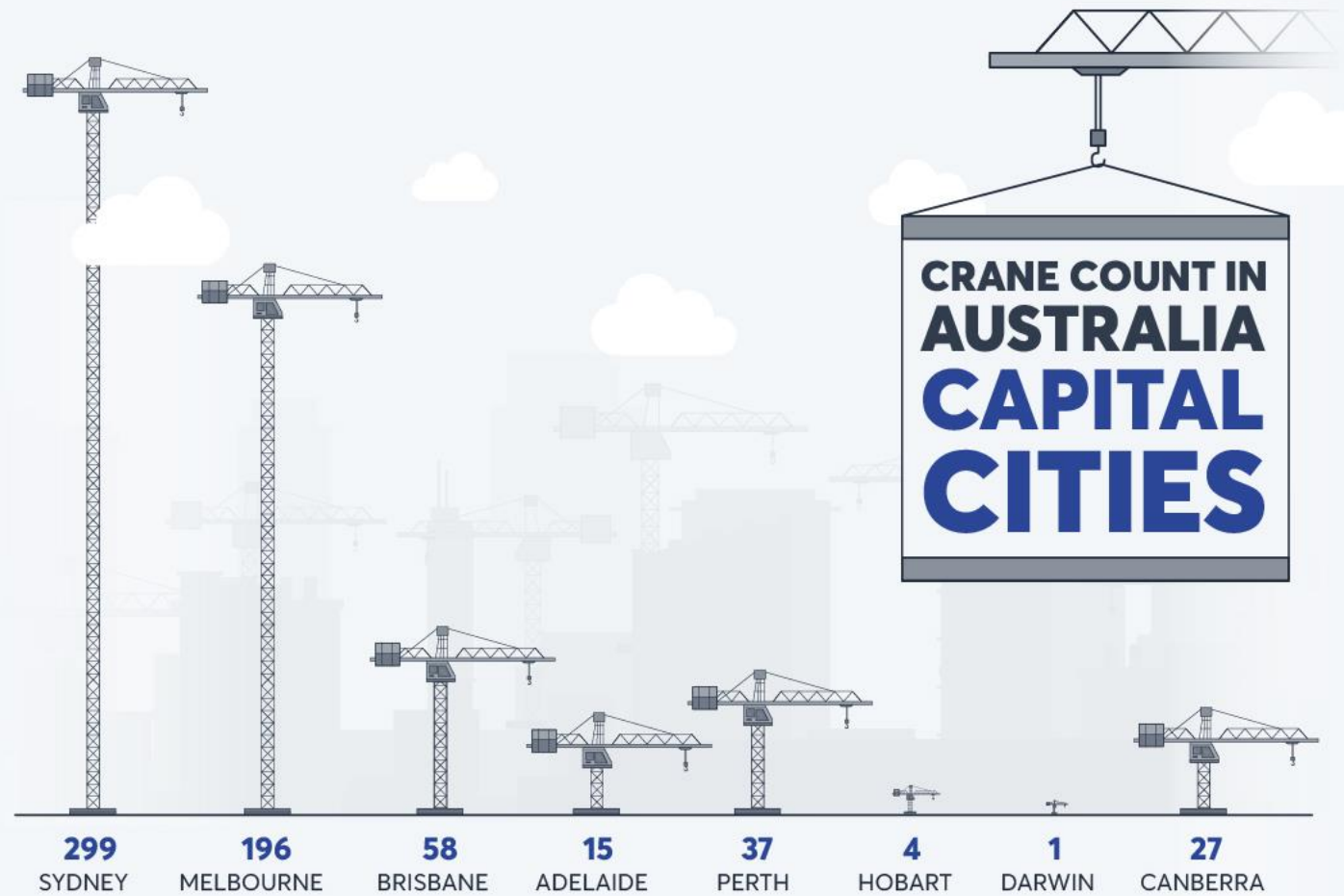
 **14.7% UNITS/APARTMENTS**



“

**IN Q3 2019 THERE WERE MORE  
CRANES IN AUSTRALIA THAN  
EVER BEFORE, HOWEVER  
CRANES NUMBERS REDUCED  
FROM 757 AT THE Q3 2019  
PEAK TO 722 IN Q1 2020.**

”

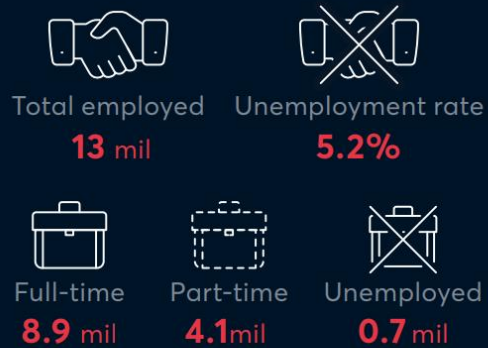


# AUSTRALIA'S POPULATION MAP

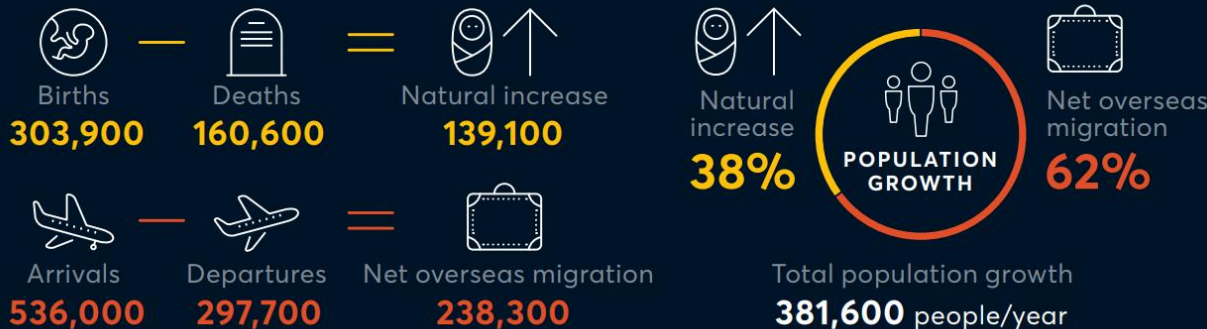
## HOUSEHOLDS



## EMPLOYMENT



## POPULATION

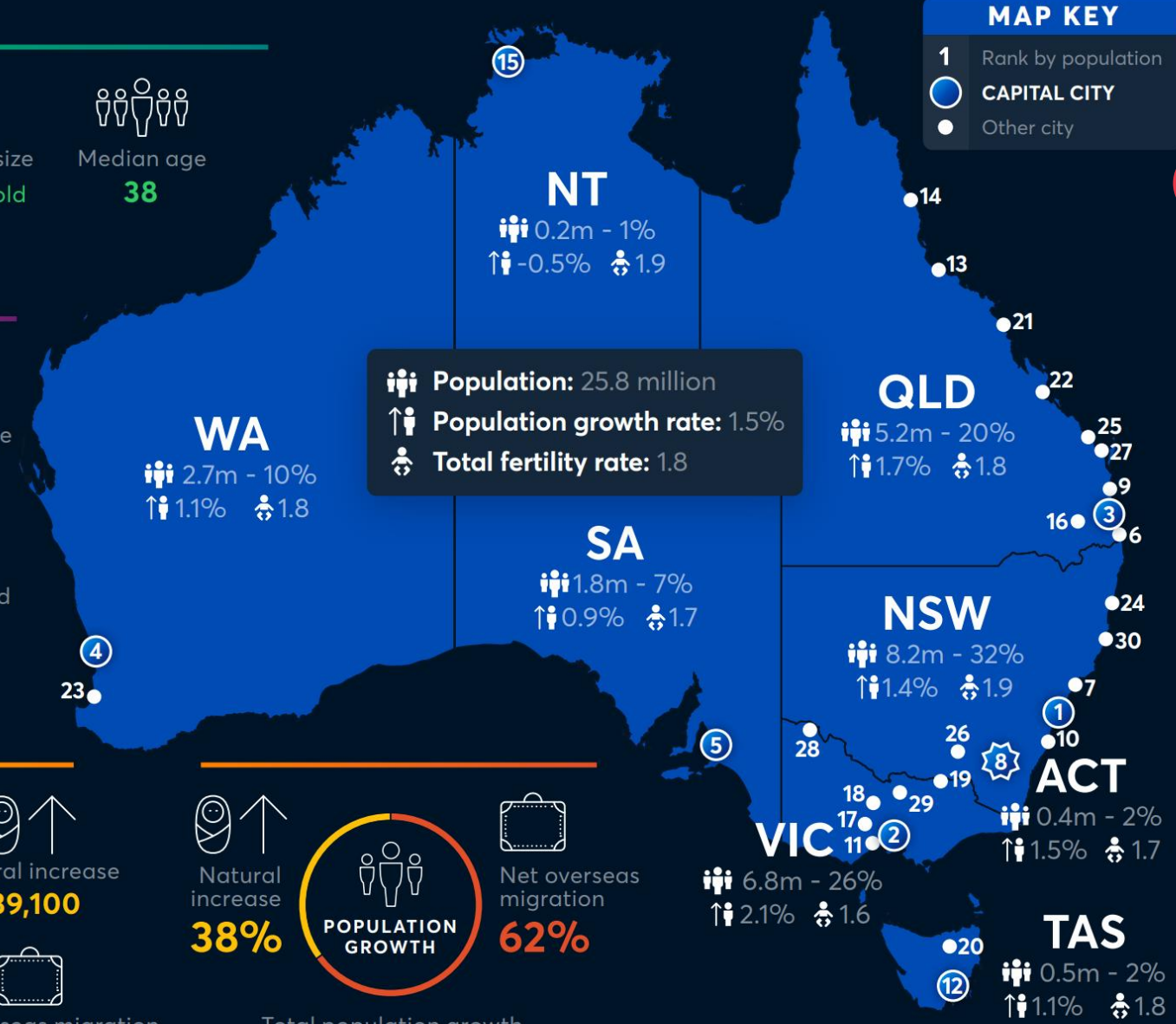


## MAP KEY

- 1 Rank by population
- CAPITAL CITY
- Other city

## CITY BY POPULATION

#	CITY	'000
1	SYDNEY	5,422
2	MELBOURNE	5,212
3	BRISBANE	2,566
4	PERTH	2,103
5	ADELAIDE	1,369
6	Gold Coast	714
7	Newcastle	499
8	ACT/CANBERRA	439
9	Sunshine Coast	351
10	Wollongong	311
11	Geelong	283
12	HOBART	239
13	Townsville	183
14	Cairns	156
15	DARWIN	148
16	Toowoomba	140
17	Ballarat	109
18	Bendigo	103
19	Albury - Wodonga	96
20	Launceston	89
21	Mackay	80
22	Rockhampton	79
23	Bunbury	75
24	Coffs Harbour	74
25	Bundaberg	72
26	Wagga Wagga	57
27	Hervey Bay	57
28	Mildura	53
29	Shepparton	53
30	Port Macquarie	50

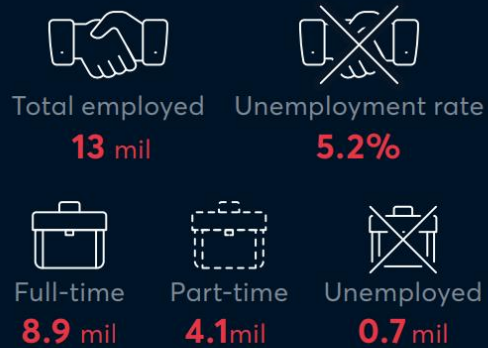


# AUSTRALIA'S POPULATION MAP

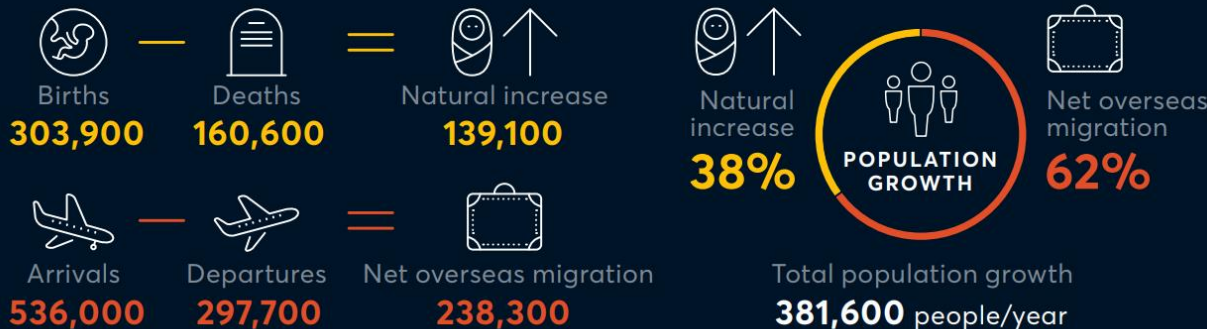
## HOUSEHOLDS



## EMPLOYMENT



## POPULATION

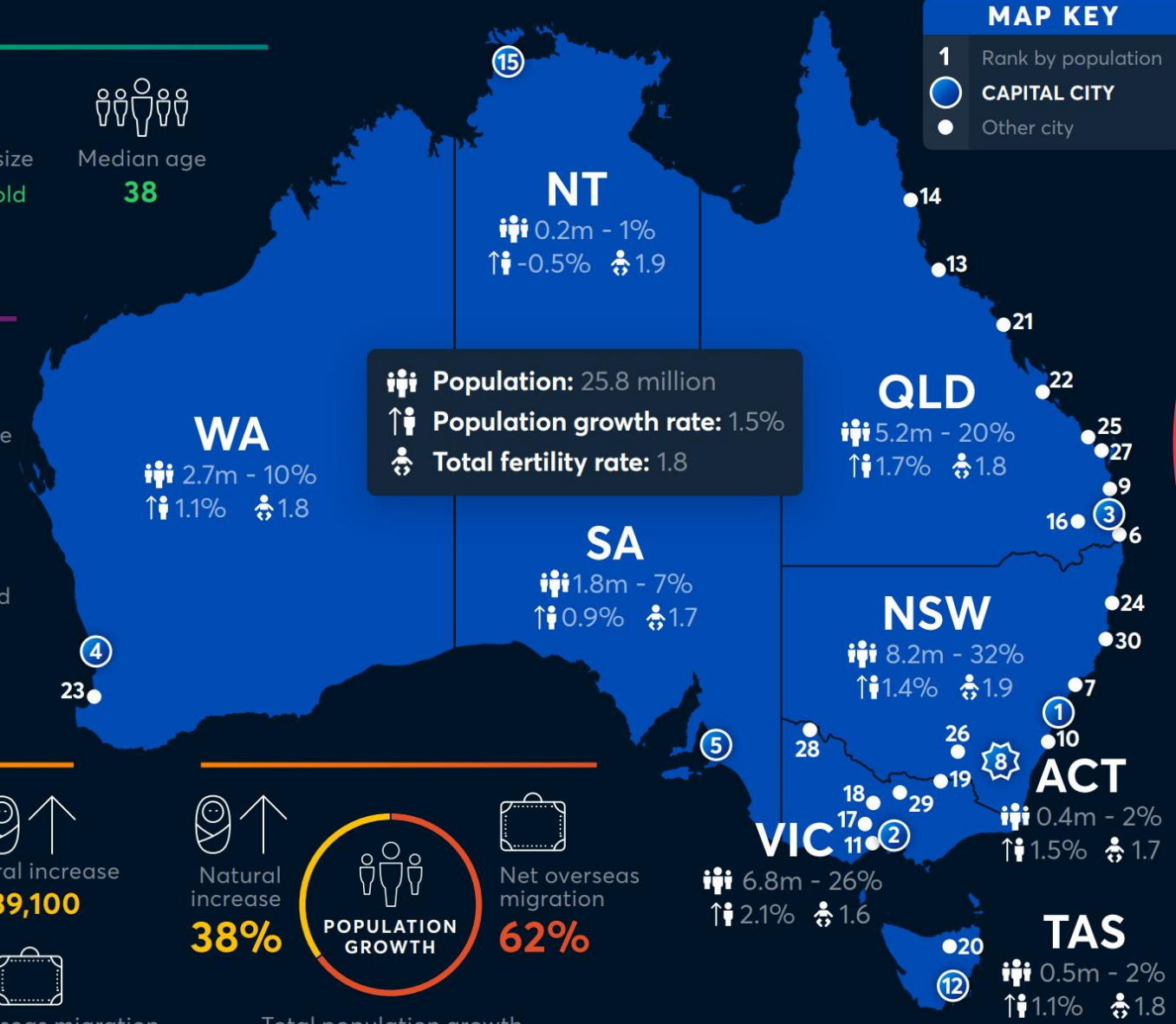


### MAP KEY

- 1 Rank by population
- CAPITAL CITY
- Other city

### CITY BY POPULATION

#	CITY	'000
1	SYDNEY	5,422
2	MELBOURNE	5,212
3	BRISBANE	2,566
4	PERTH	2,103
5	ADELAIDE	1,369
6	Gold Coast	714
7	Newcastle	499
8	ACT/CANBERRA	437
9	Sunshine Coast	351
10	Wollongong	311
11	Geelong	283
12	HOBART	239
13	Townsville	183
14	Cairns	156
15	DARWIN	148
16	Toowoomba	140
17	Ballarat	109
18	Bendigo	103
19	Albury - Wodonga	96
20	Launceston	89
21	Mackay	80
22	Rockhampton	79
23	Bunbury	75
24	Coffs Harbour	74
25	Bundaberg	72
26	Wagga Wagga	57
27	Hervey Bay	57
28	Mildura	53
29	Shepparton	53
30	Port Macquarie	50



# Dwelling Structure



# Dwelling Structure



77%



16%



7%

Perth



# Dwelling Structure



Perth

77%

16%

7%

Adelaide

75%

17%

8%



*Save 270  
hours/year*

# Dwelling Structure



Perth

77%

16%

7%

Adelaide

75%

17%

8%

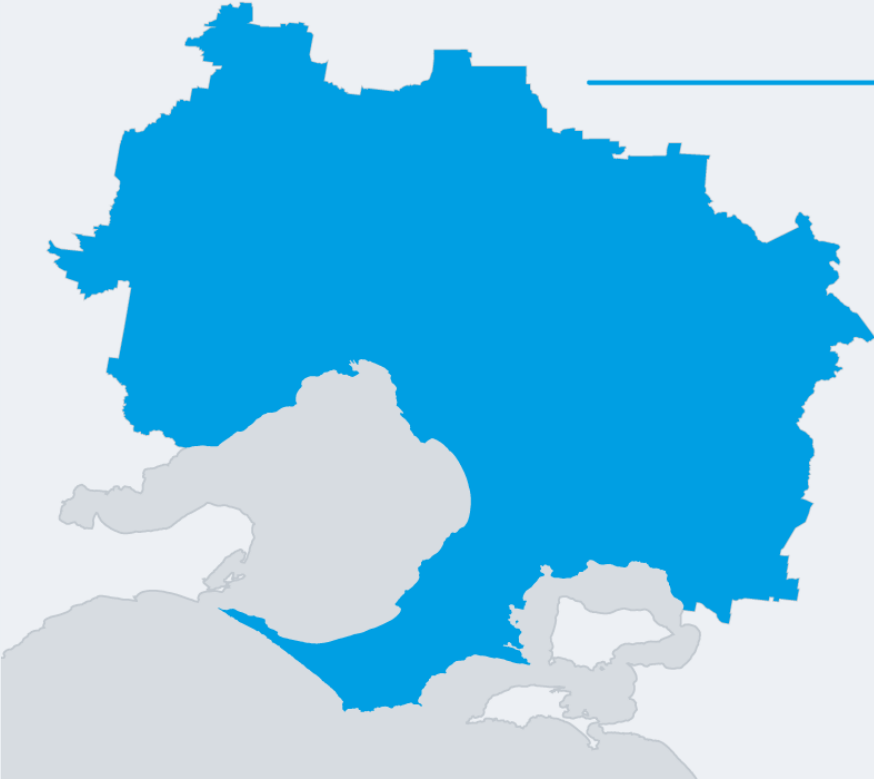
Melbourne

68%

17%

15%

# Melbourne – global comparisons



Melbourne GCCSA: 9,993 km<sup>2</sup>

	Melbourne	New York	Paris	Berlin	London
<b>Population</b>	5 million	17.8 million	9.6 million	3.7 million	8.3 million
<b>Population density (people per km<sup>2</sup>)</b>	500	2,050	3,550	3,750	5,100
					

# Dwelling Structure



Perth

77%

16%

7%

Adelaide

75%

17%

8%

Melbourne

68%

17%

15%

Sydney

57%

14%

28%



*How do we  
create human  
flourishing?*

# Australian cities

Connectivity



***We need to build cities from the internet up.***



# Australian cities

Connectivity  
Liveability





*1 in 4 can't  
survive the  
day without  
coffee*

# Australian cities

Connectivity  
Liveability  
Accessibility





*1 in 2 don't get the  
recommended  
150mins physical  
activity/week*

# Australian cities

Connectivity  
Liveability  
Accessibility  
Affordability





*Cost of  
congestion is  
\$16.5b in 2015*



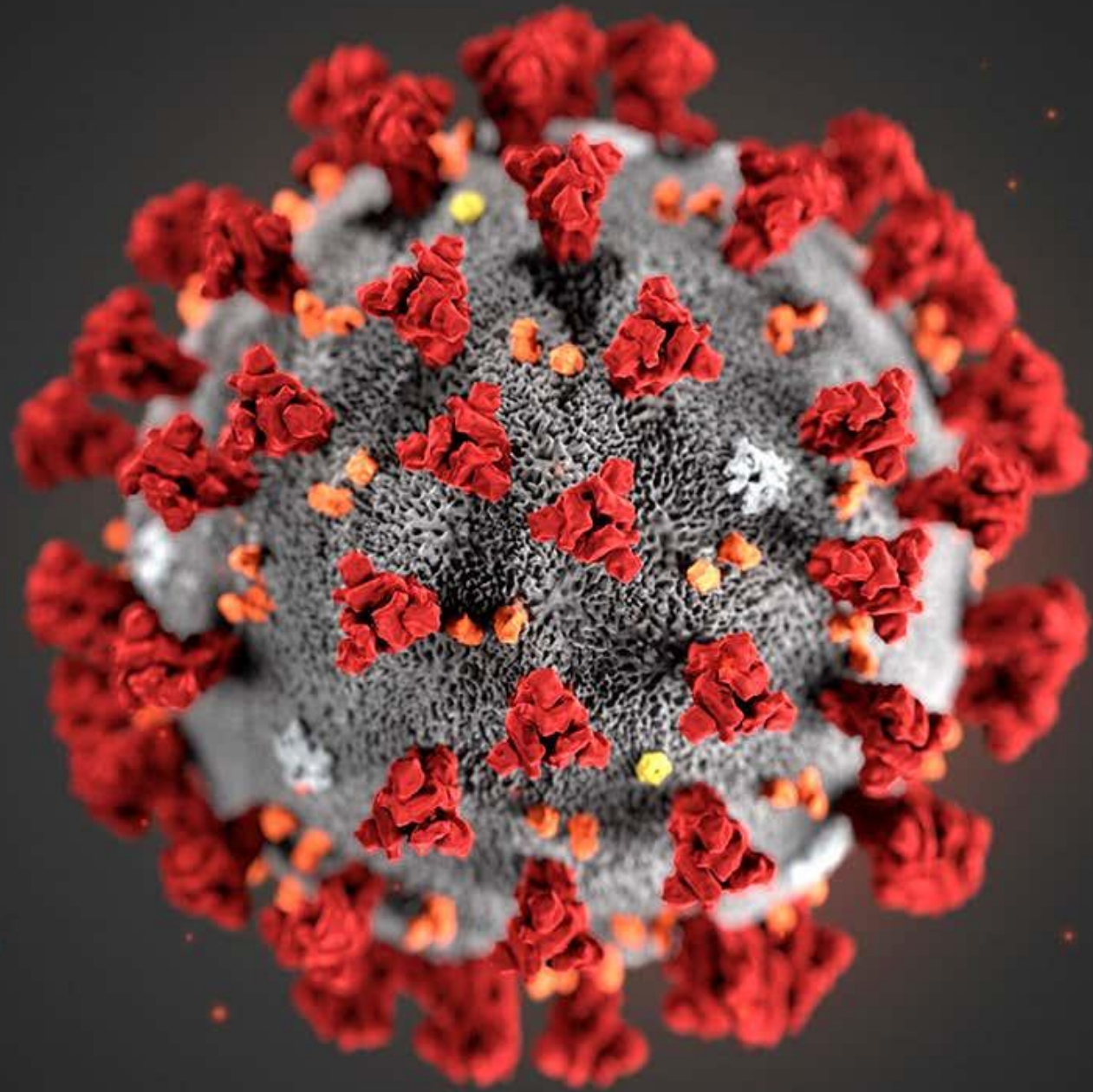
*Cost of  
congestion is  
\$16.5b in 2015  
Growing to  
\$27.3b by 2030*

# Australian cities

Connectivity  
Liveability  
Accessibility  
Affordability  
Sustainability







# The new normal

## 3 in 4

Australians believe  
working from home will  
become the new normal



# Working from home

“I am experiencing working from home and want to keep it”:



Gen Z

27%



Gen Y

40%



Gen X

25%

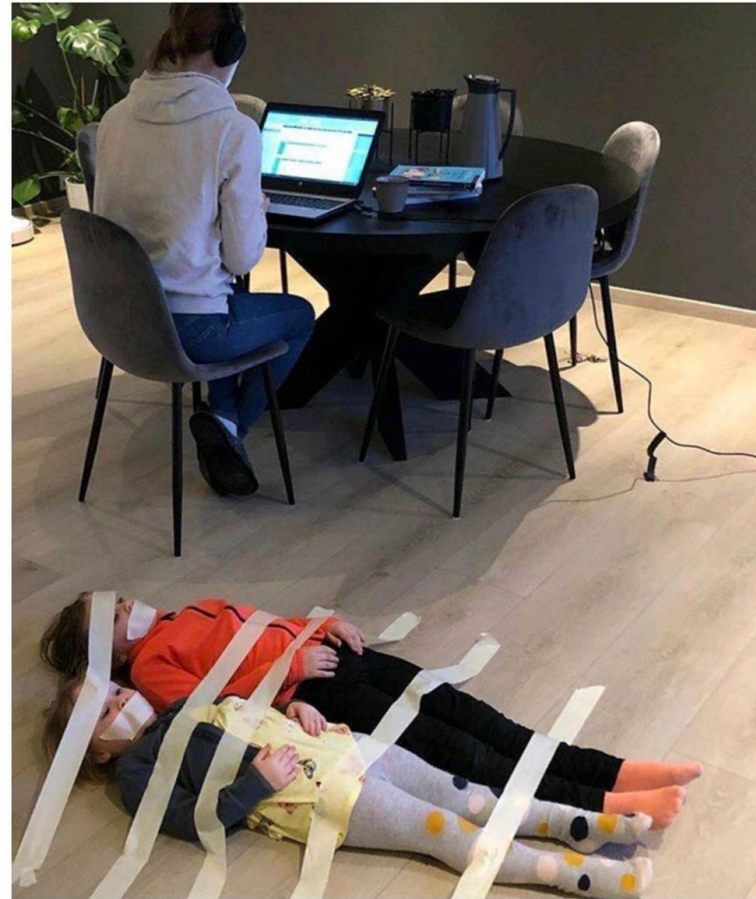


Boomers

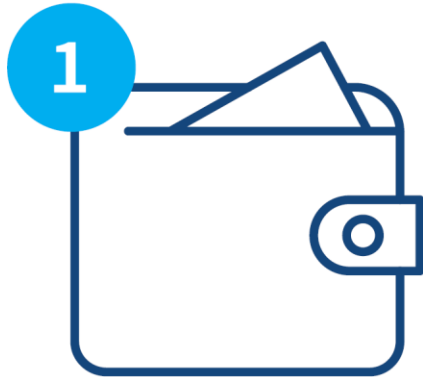
12%

# Working From Home (WFH)

Working from home as a parent...

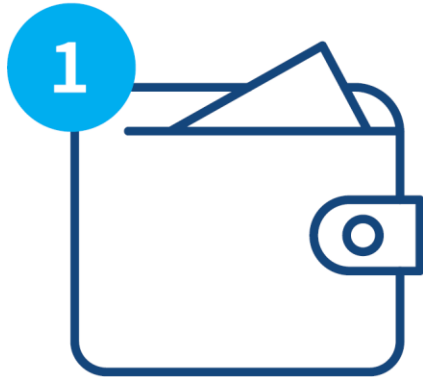


# 'MUST Haves' For Lifestyle Cities



AFFORDABILITY

# 'MUST Haves' For Lifestyle Cities

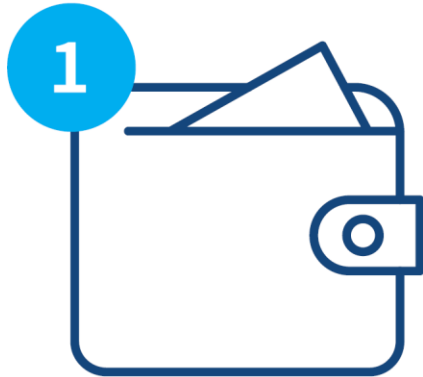


AFFORDABILITY



SERVICES

## 'MUST Haves' For Lifestyle Cities



AFFORDABILITY

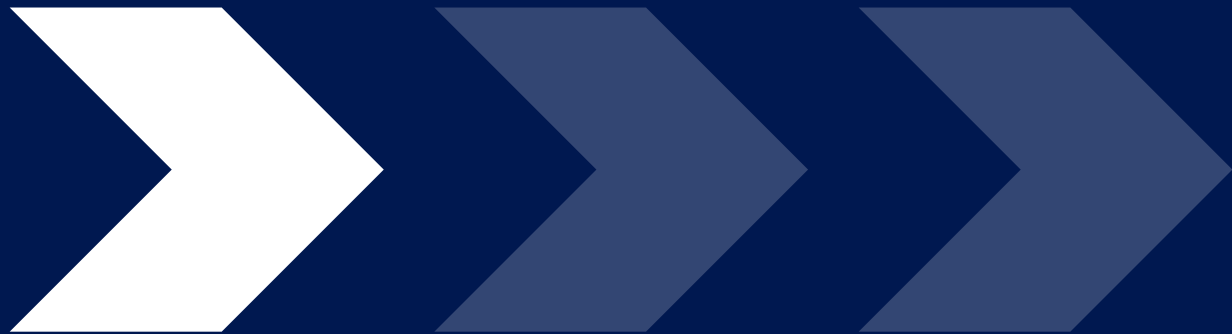


SERVICES



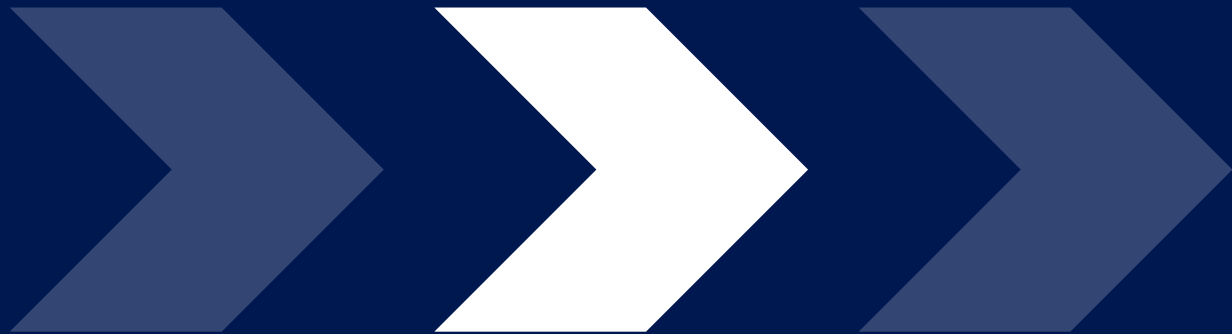
SOCIAL  
AMENITIES

# OUR POPULATION IS CHANGING

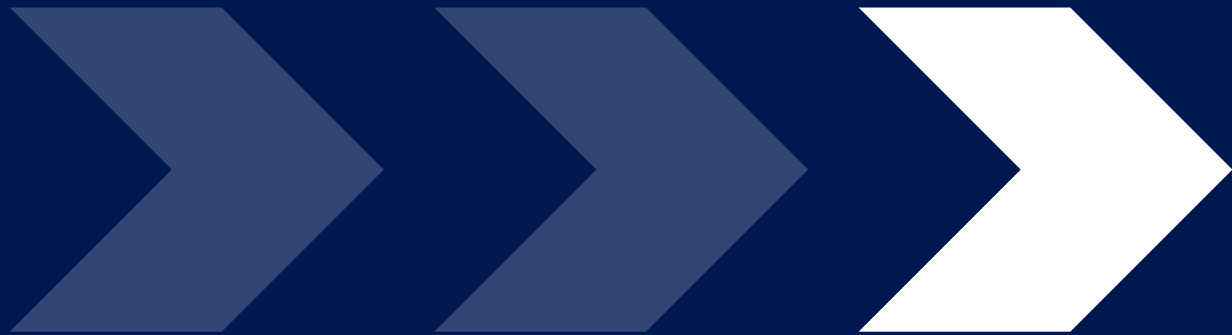




# OUR GENERATIONS ARE CHANGING



# OUR APPROACH NEEDS CHANGING



***A crisis is a terrible thing to  
waste.***

***Winston Churchill***