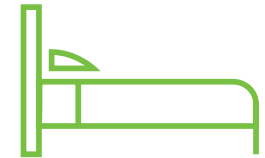


2016

Houzz Australia Bedroom Trends Study



Big Ideas

- **Modest budgets:** Two in five renovating homeowners are dedicating more than \$5000 on master bedroom projects, with only a quarter of decorating homeowners budgeting or spending \$5000 on master bedrooms
- **Keeping it calm:** Almost three quarters of homeowners want to create a calming atmosphere in their master bedroom, with contemporary being the most popular style
- **The top triggers for master bedroom projects:** Over a third of homeowners had recently purchased a new home and were looking to make it their 'own', and a quarter could no longer stand their old room
- **Frequently decorating:** Almost half of homeowners reported that their master bedroom was redecorated in the last five years, only to repeat again now
- **Top décor:** Neutral colors, wall art, mirrors and throw pillows dominate in updated master bedrooms

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At a Glance: Renovation

| | MASTER BEDROOMS | | OTHER BEDROOMS | |
|--|--|-----|-----------------------------------|-----|
| Increasing Size (among renovating homeowners) | Bedroom increase | 32% | Bedroom increase | 35% |
| | Wardrobe increase | 69% | Wardrobe increase | 70% |
| Top Lighting Choice (among those upgrading lighting) | Table lamp | 36% | Table lamp | 36% |
| | Ceiling fixture with fan | 35% | Ceiling fixture with fan | 30% |
| Top Flooring Choice (among those upgrading flooring) | Carpet | 53% | Carpet | 51% |
| | Wood | 32% | Wood | 35% |
| Professional Help (among renovating homeowners) | Hired a pro | 79% | Hired a pro | 75% |
| Top Project Triggers (among renovating homeowners) | Recently purchased new home | 36% | Recently purchased new home | 28% |
| | Wanted to do it all along and finally have the means | 28% | Adapting to changes with children | 28% |

At a Glance: Decorating

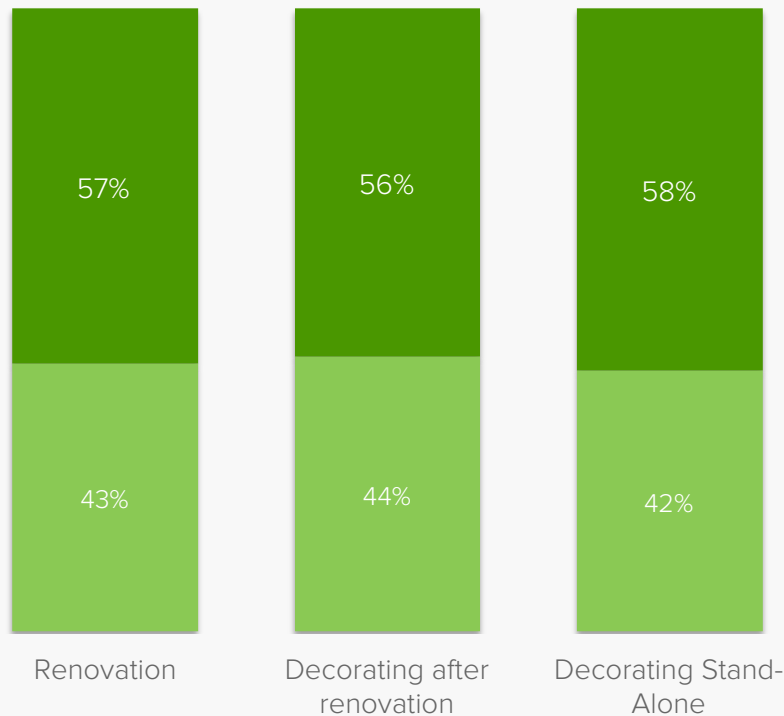
| | MASTER BEDROOMS | | OTHER BEDROOMS | |
|---|---|-----|---|-----|
| Desired Atmosphere (among decorating homeowners) | Calming | 72% | Calming | 61% |
| | Cosy | 35% | Cosy | 36% |
| | Luxurious | 29% | Cheerful | 26% |
| Top Updates (among decorating homeowners) | Wall finish (paint, wallpaper, texture) | 91% | Wall finish (paint, wallpaper, texture) | 91% |
| | Lighting fixtures | 79% | Lighting fixtures | 80% |
| Top Furniture Choice (among those upgrading furniture) | Bedside drawers | 59% | Bedside table | 53% |
| | Bedside table | 59% | Wardrobe | 59% |
| Top Decorative Items (among those adding or replacing decorative items) | Wall art - original | 44% | Wall art | 40% |
| | Pillows | 61% | Pillows | 57% |
| Top Patterns (among decorating homeowners) | No patterns (solids only) | 29% | No patterns (solids only) | 28% |
| | Geometric | 12% | Geometric | 13% |
| Top Colours (among decorating homeowners) | White | 46% | White | 48% |
| | Grey | 30% | Grey | 26% |

Scope & Triggers

Substantial Master Renovations

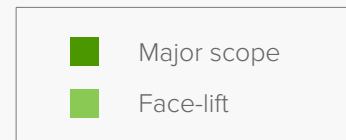
Over half of master bedroom renovations are major in scope, such as floor, door, and window replacements, and/or moving walls. Most renovating homeowners are keeping the master bedroom size about the same, with almost a third increasing the size.

SCOPE OF MASTER BEDROOM PROJECTS*



Change in Master Bedroom Size After a Renovation

| | |
|-----|--------------------------------------|
| 8% | Significantly larger (50%+ increase) |
| 24% | Larger (<50% increase) |
| 64% | Same or about the same |
| 3% | Smaller |

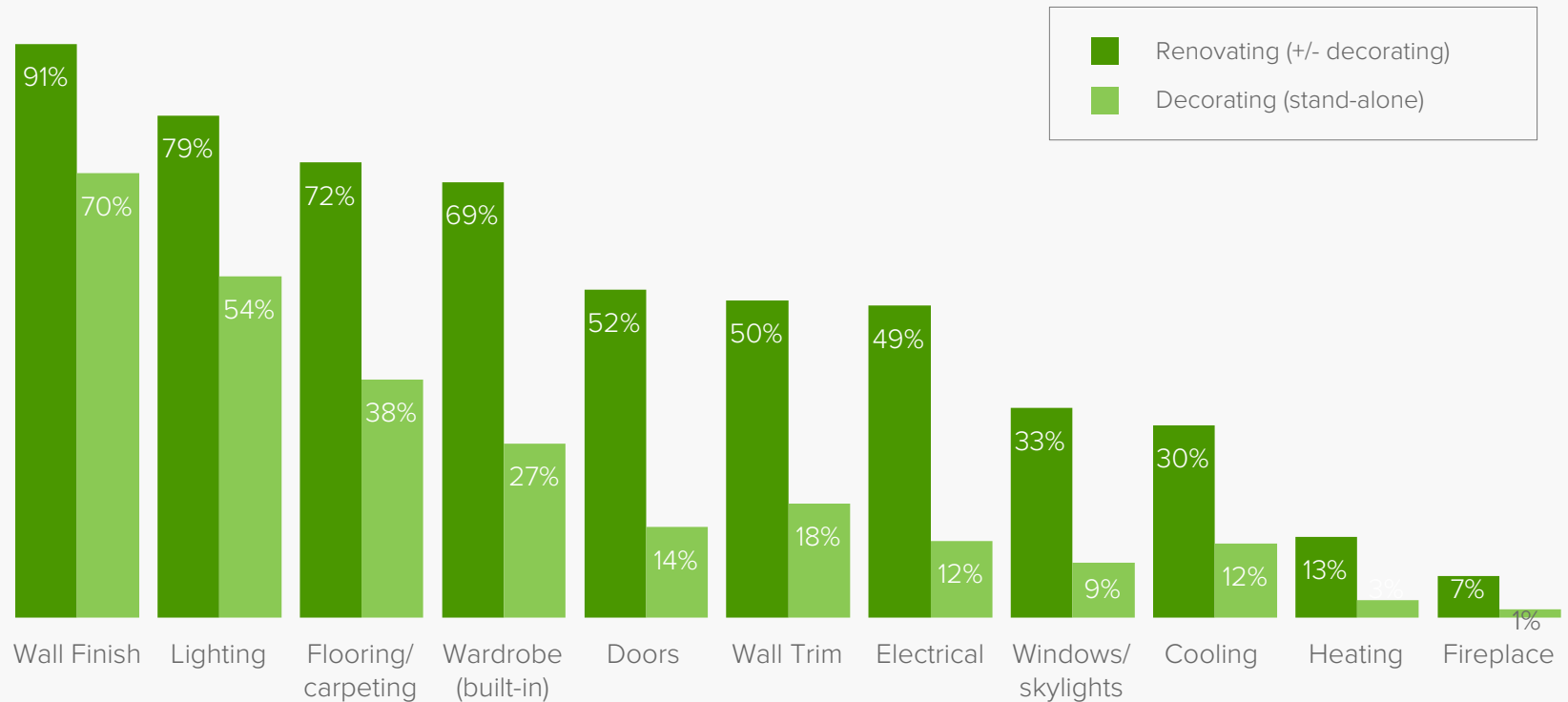


*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom project.

Blurred Lines

Homeowners are adding, replacing, and refinishing major features as part of both major renovations and stand-alone decorating projects, making the line between light renovation and heavy-duty decorating rather blurry.

UPGRADED MAJOR FEATURES IN MASTER BEDROOM PROJECTS*

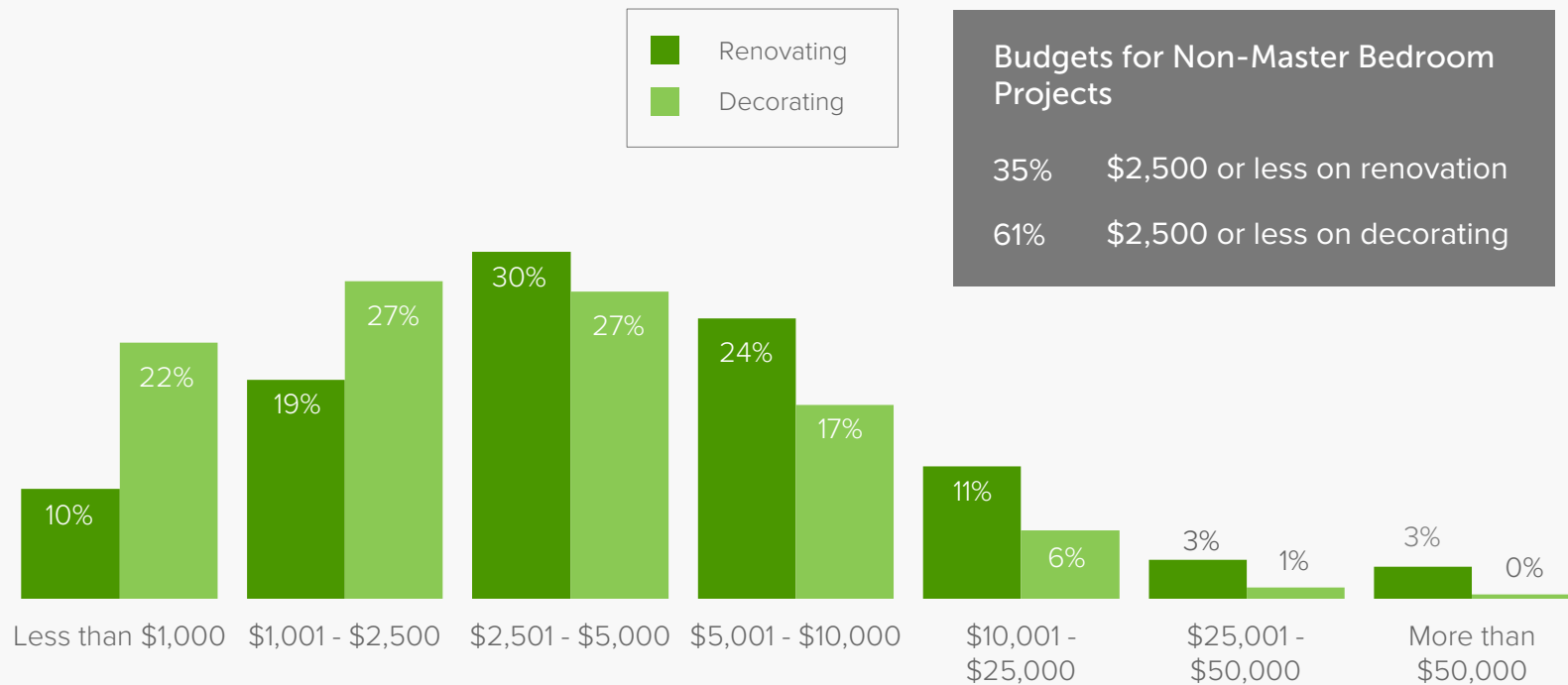


*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom project.

Master Bedroom Budgets

One-in-ten homeowners are budgeting or spending less than \$1,000 on their master bedroom renovations projects, with two in five (41%) dedicating more than \$5000 on master bedroom projects. Not surprisingly, decorating budgets are lower, with only a quarter budgeting or spending \$5000 on master bedroom.

BUDGETS FOR MASTER BEDROOM PROJECTS*

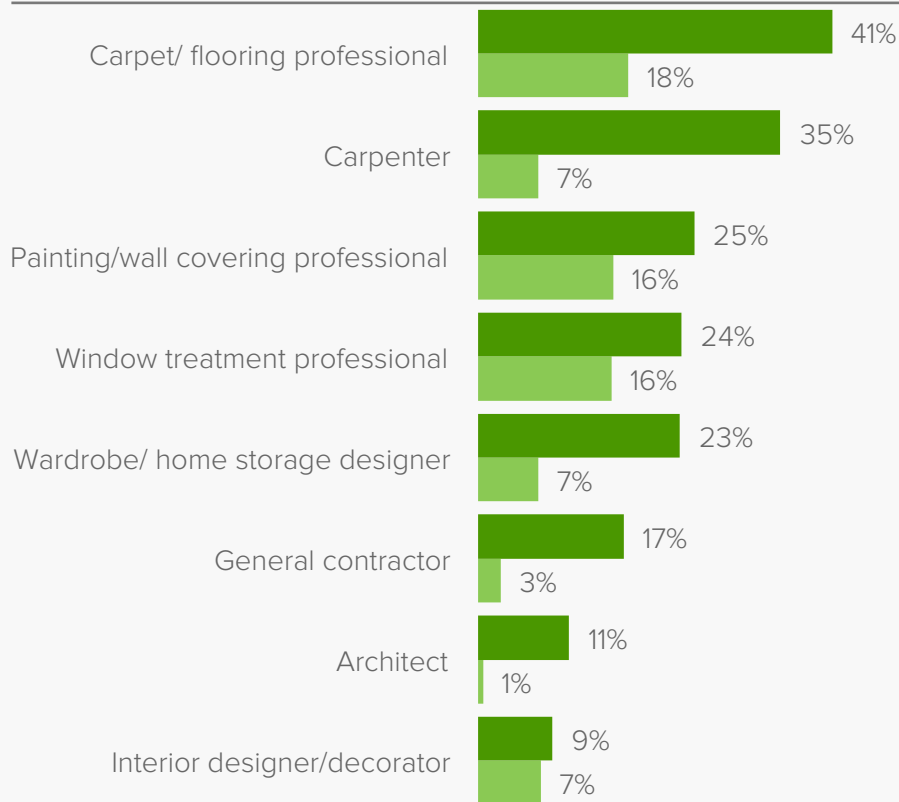


*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom project.

A Helping Hand

Four in five homeowners (79%) are enlisting the help of a professional during their master bedroom renovation or subsequent decorating project. Aussies are most likely to hire professionals to fit new carpet or flooring, followed by carpenters then painters.

HIRING PROFESSIONALS FOR MASTER BEDROOM PROJECTS*



Pro Hiring in Master Bedroom Projects*

79% Renovating (+/- decorating)

50% Stand-alone decorating

Pro Hiring in Non-Master Bedroom Projects*

75% Renovating (+/- decorating)

35% Stand-alone decorating

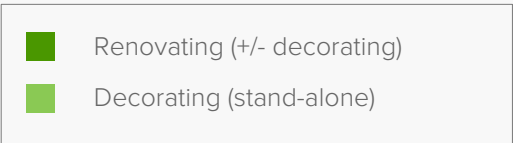
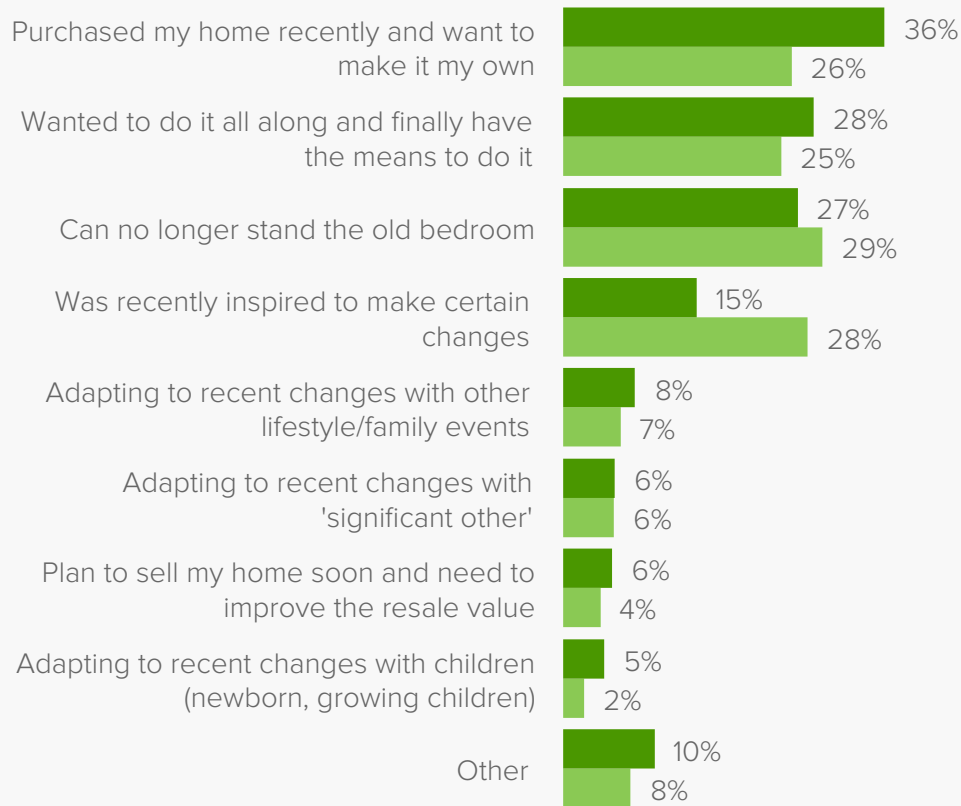
■ Renovating (+/- decorating)
■ Decorating (stand-alone)

*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom project.

The Breaking Point

Over a third (36%) of those who renovated a master bedroom, stated that purchasing a new home and wanting to make it one's own, is the #1 driver in master bedroom projects. More than a quarter of homeowners (28%) also reported that they wanted to do it all along and finally have the means to, and many had just reached a breaking point (27%).

EVENTS TRIGGERING MASTER BEDROOM PROJECTS*



5% vs 28%

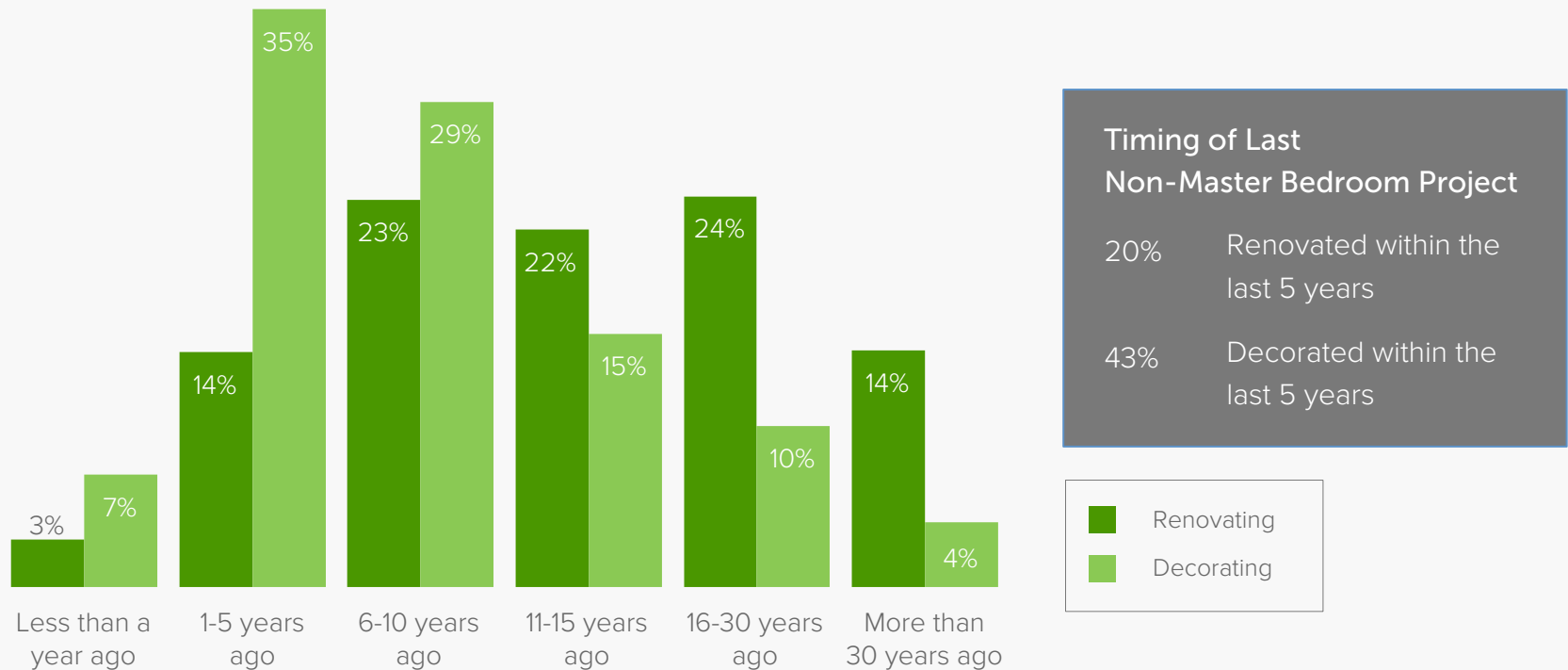
CHANGES WITH CHILDREN
in master vs. other bedrooms as project triggers among renovating homeowners

*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom project.

Frequently Decorating

Two in five (42%) of homeowners reported that their master bedroom was decorated in the last five years, with 7% of those claiming to have decorated only in the last year, to repeat again now. Decorating other rooms is also frequent, with 43% of decorators saying they had decorated within the last 5 years.

TIMING OF LAST MASTER BEDROOM RENOVATING AND DECORATING PROJECTS*



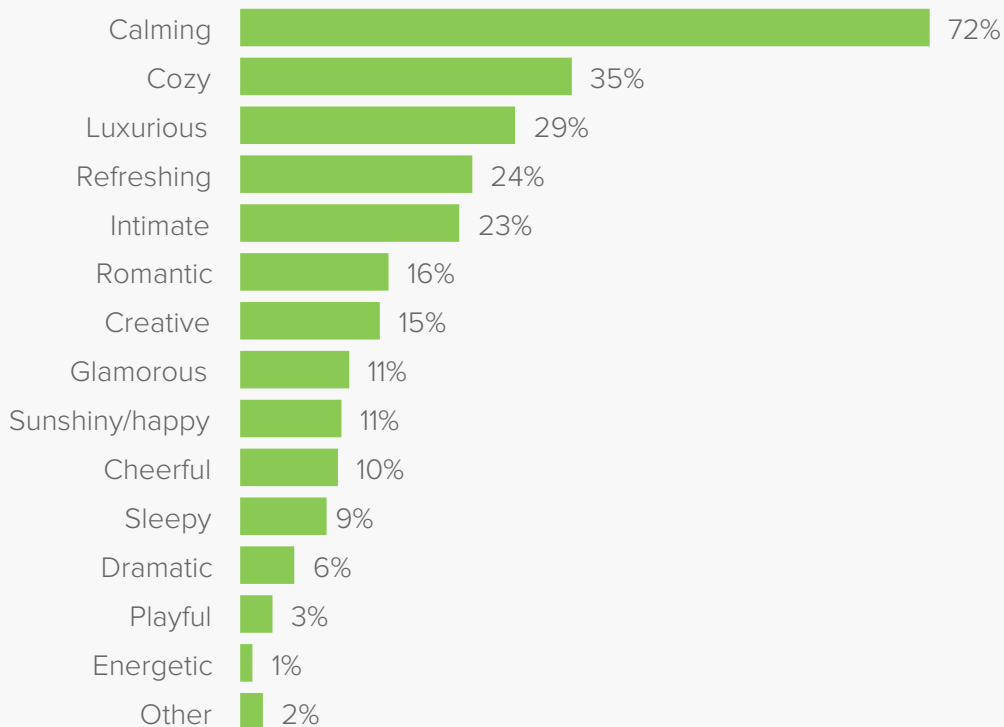
*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom project.

Sentiment & Style

Calm, Comfort & 5-Star Sleeping

Three in four homeowners (72%) choose colours, patterns and materials to achieve a calm vibe in all bedrooms. The majority of decorating homeowners want to achieve a calming atmosphere in the master and other bedrooms (72% and 61%, respectively). After cosiness (35%) and luxury (29%), preferences for vibe vary greatly.

TARGET ATMOSPHERE IN MASTER BEDROOM DECORATING*



Target Atmosphere in Non-Master Bedrooms

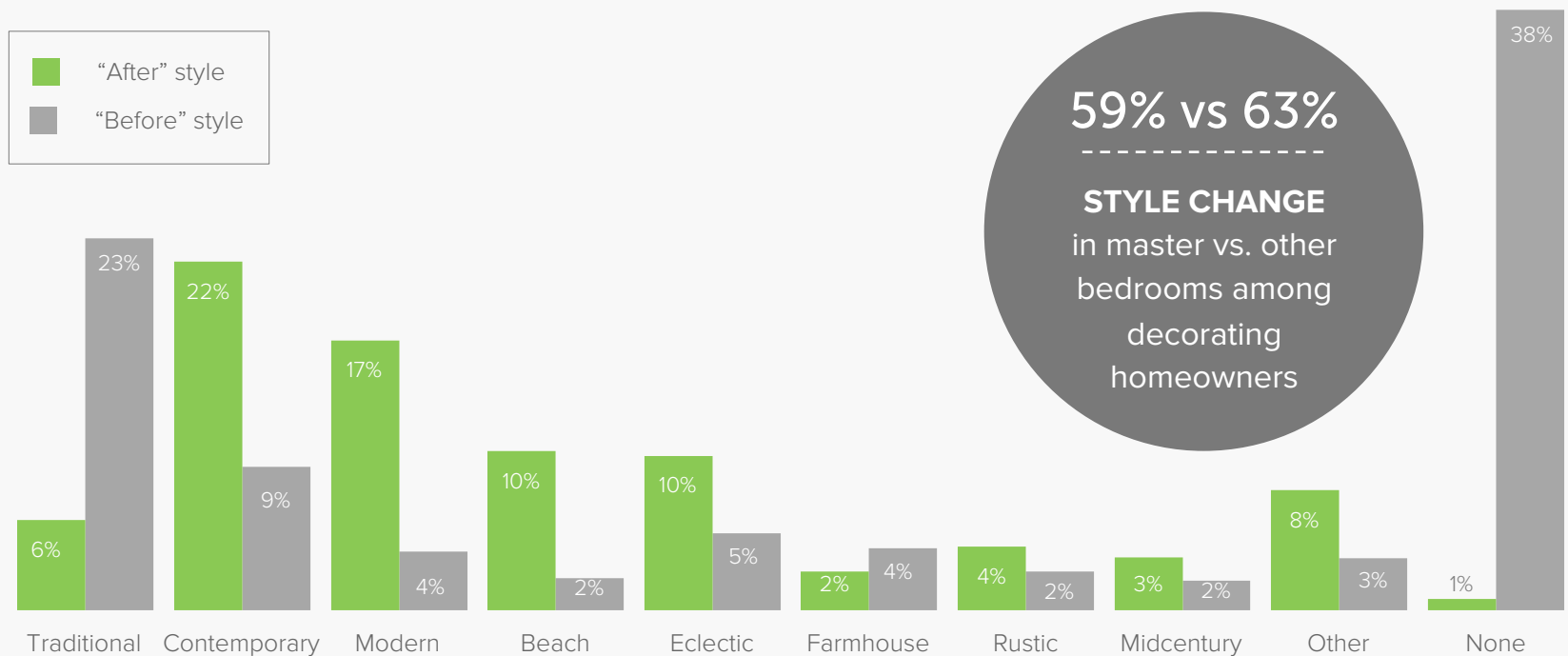
| | |
|-----|------------|
| 61% | Calming |
| 36% | Cosy |
| 26% | Cheerful |
| 25% | Refreshing |
| 24% | Creative |
| 18% | Happy |
| 16% | Luxurious |
| 14% | Playful |
| 11% | Intimate |
| 8% | Glamorous |
| 3% | Other |

*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom *decorating* project.

Time for Change

Over half of homeowners change the style of their master bedroom during a decorating project (59%), with one in three saying that their old rooms lacked any style. Of those changing the master bedroom style, two thirds (39%) opt for a contemporary or modern style in their space and away from traditional styled bedrooms.

BEFORE AND AFTER STYLE IN MASTER BEDROOM STYLE UPDATES*

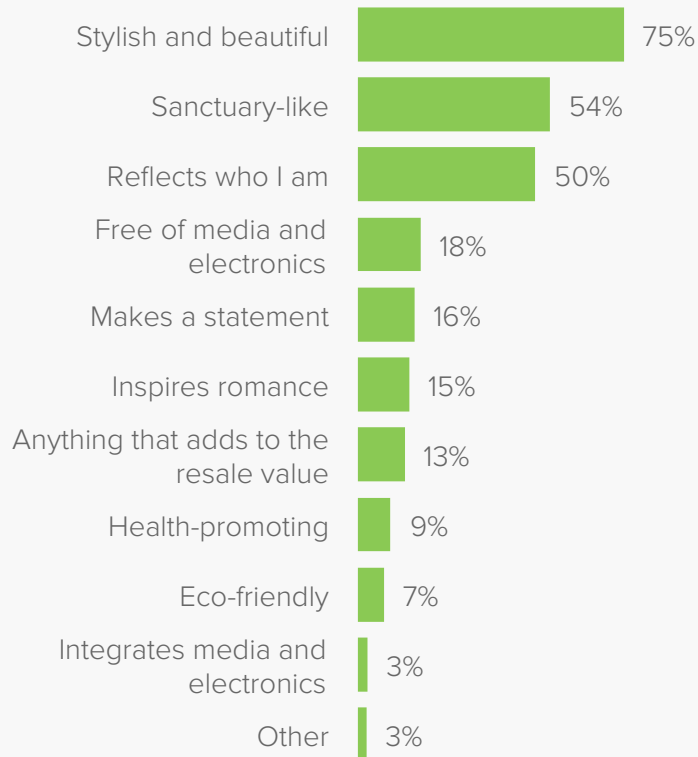


*Percentages reflect proportion of homeowners who have changed bedroom style during recent, current, or planned master bedroom decorating projects.

Focus on Beauty & Self

Homeowners prioritise stylish (75%) and sanctuary-like spaces (54%) in their master bedroom design. Over one in ten update to add to the resale value. Quality sleep, comfort and ease of cleaning are key functional aspects when it comes to the design of our bedrooms.

MOST VALUED ASPECTS OF MASTER BR DESIGN*



MOST VALUED ASPECTS OF MASTER BR FUNCTION*



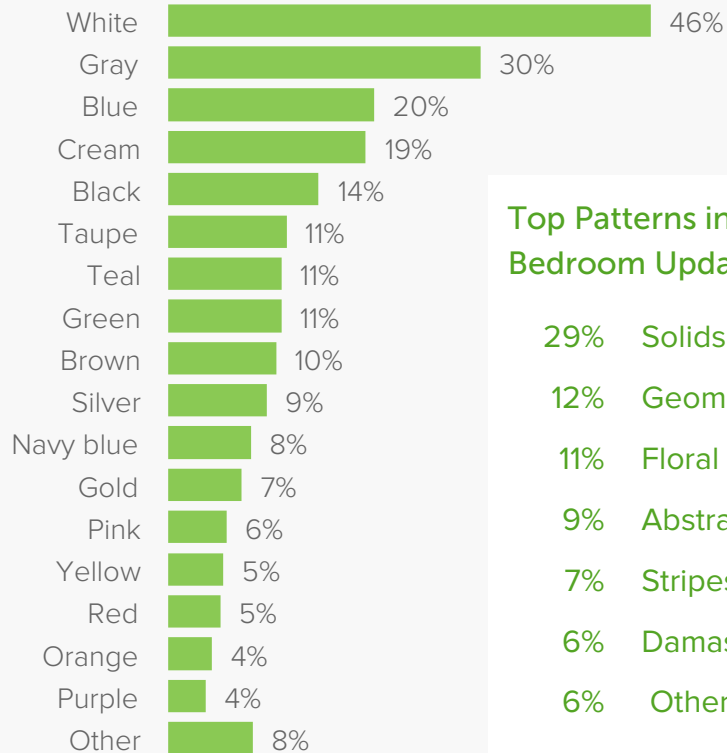
*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom decorating project.

Décor & Finishes

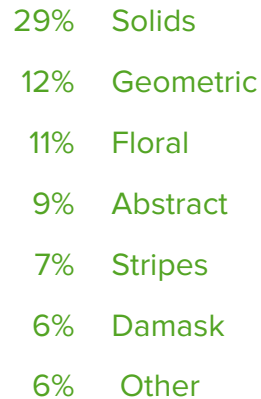
Keeping the Calm

Homeowners gravitate toward calming colours like white, grey, blue and cream in master bedrooms. Many updated master bedrooms prefer solid non-patterns (29%), though geometric is somewhat popular (12%). Wood (44%) and cotton (37%) are the most common materials; one in 20 will embellish their rooms with leather or hide.

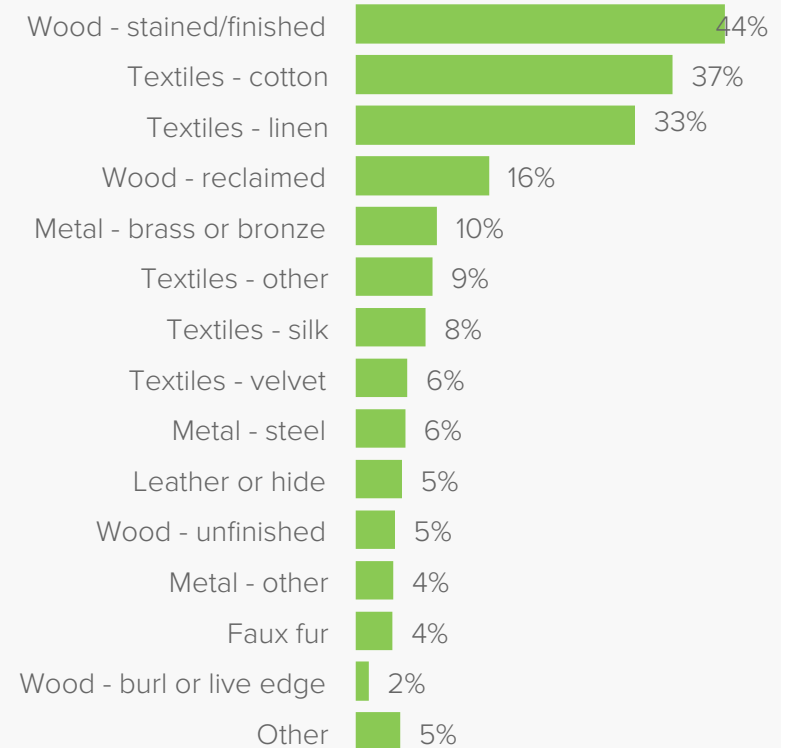
TOP COLOURS IN MASTER BEDROOMS UPDATES*



Top Patterns in Master Bedroom Updates*



TOP MATERIALS IN MASTER BEDROOMS UPDATES*

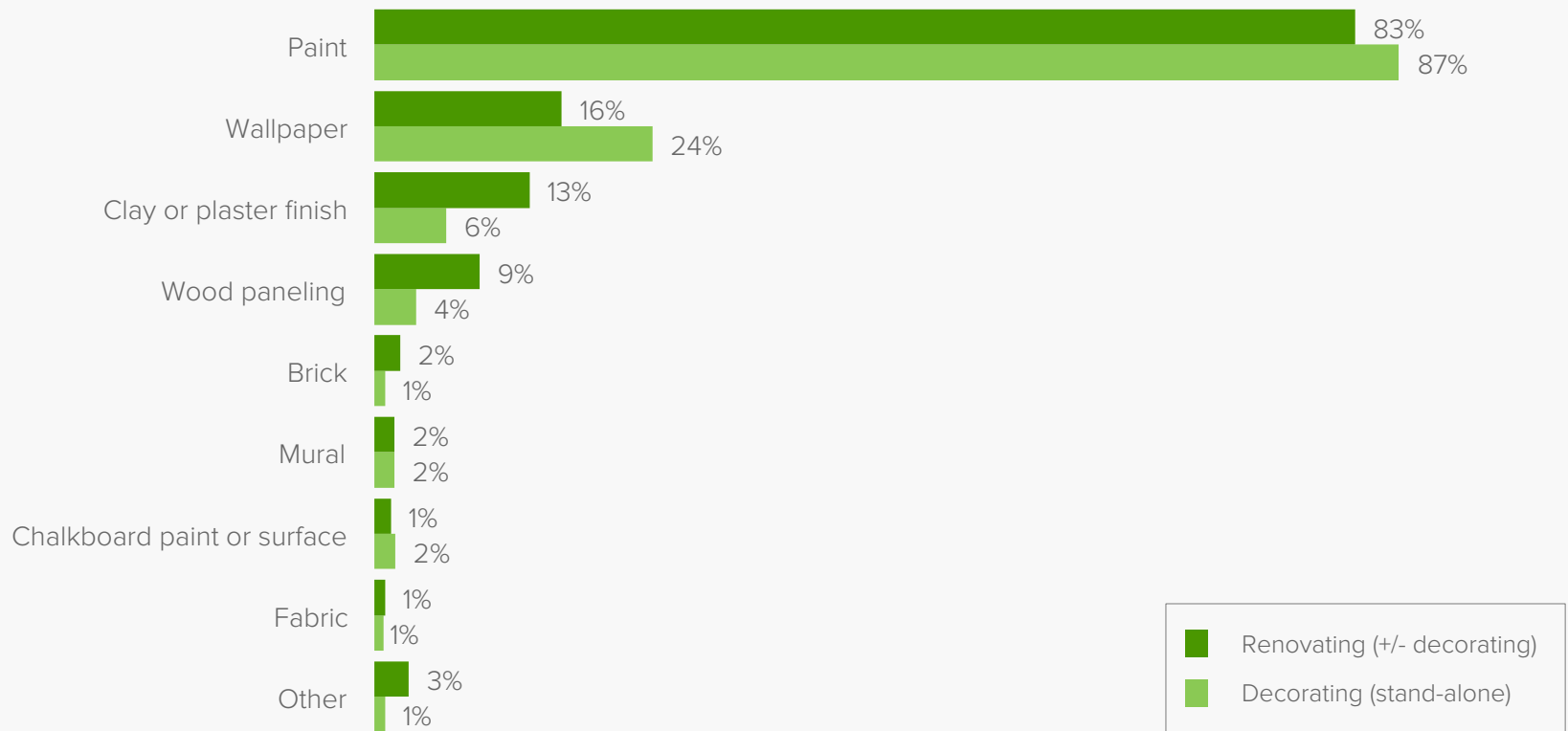


*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom *decorating* project.

The Majority Choose Paint

The majority of homeowners who are renovating or decorating their master bedroom are upgrading wall finishes (91%), and are doing so with paint (83%). Just under a fourth opt for wallpaper, around a tenth choose clay or plaster finish or plaster finish, with a few experimenting with brick, chalkboard paint and murals.

NEW FINISHES IN MASTER BR WALL UPGRADES*

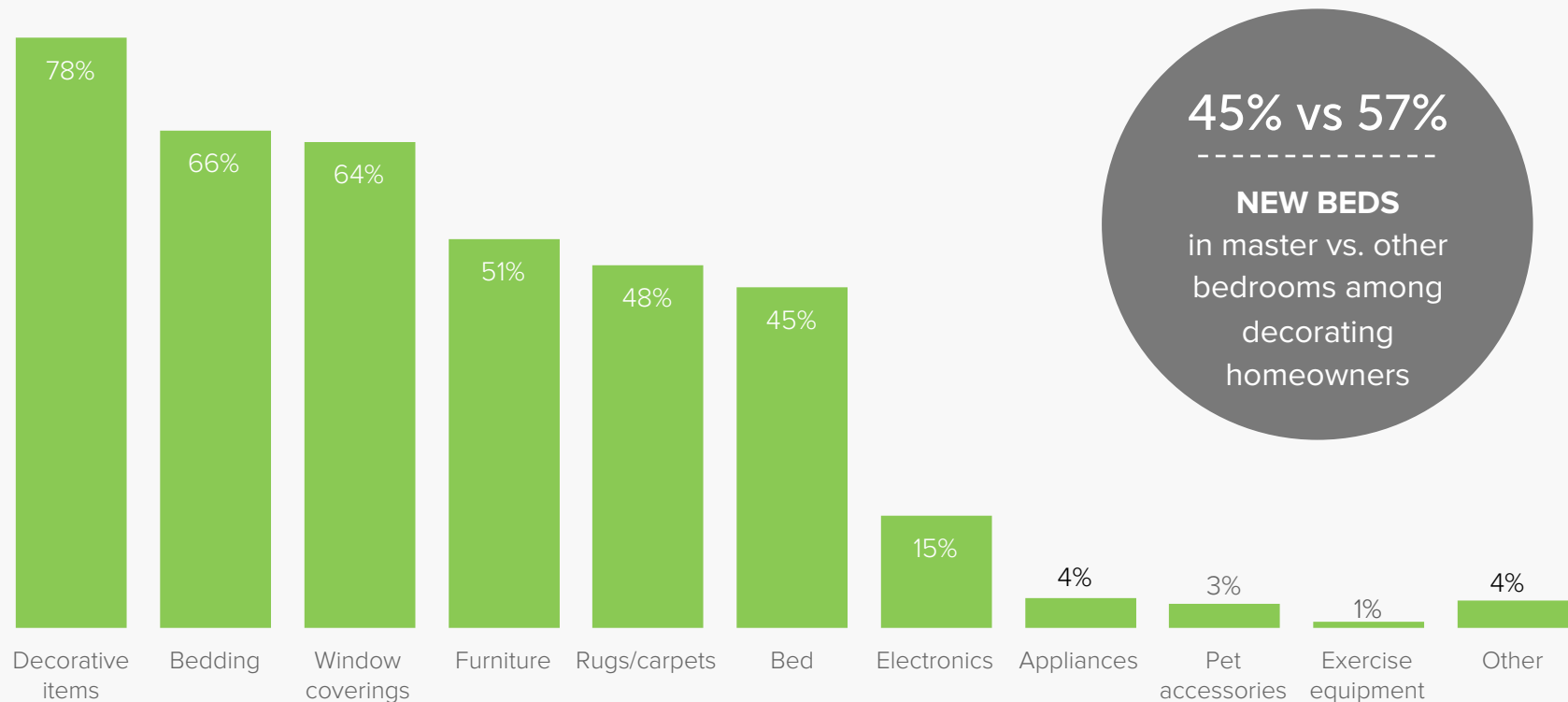


*Percentages reflect proportion of homeowners who are upgrading wall finishes as part of their completed, current, or planned master bedroom projects.

Decorating: Not Just About the Details

Four in five decorating homeowners are updating small décor elements in their master bedroom (78%), over half are replacing bedding and window coverings (66% & 64%, respectively). One in two (51%) are updating their furniture. Beds are more likely to be replaced in non-master bedroom decorating projects than in master bedrooms.

NEW DECORATING ELEMENTS ADDED IN MASTER BEDROOM DECORATING PROJECTS*

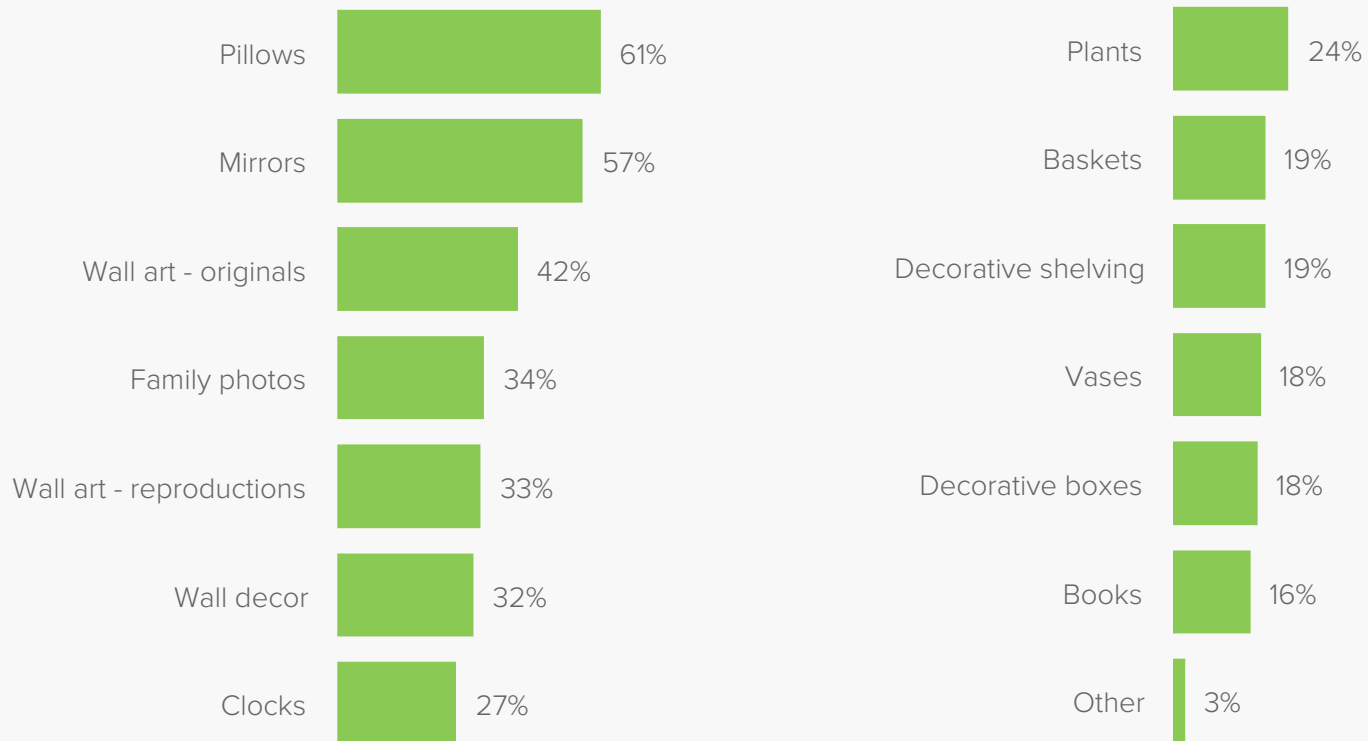


*Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bedroom *decorating* project.

Culture Vultures

Among those updating decorative accessories in their master bedroom, over three quarters are adding or replacing wall art (75%), and many are finding other ways to fill wall space, from mirrors (57%) to family photos (34%).

NEW ITEMS IN MASTER BEDROOM DECORATIVE ACCESSORIES UPDATES*

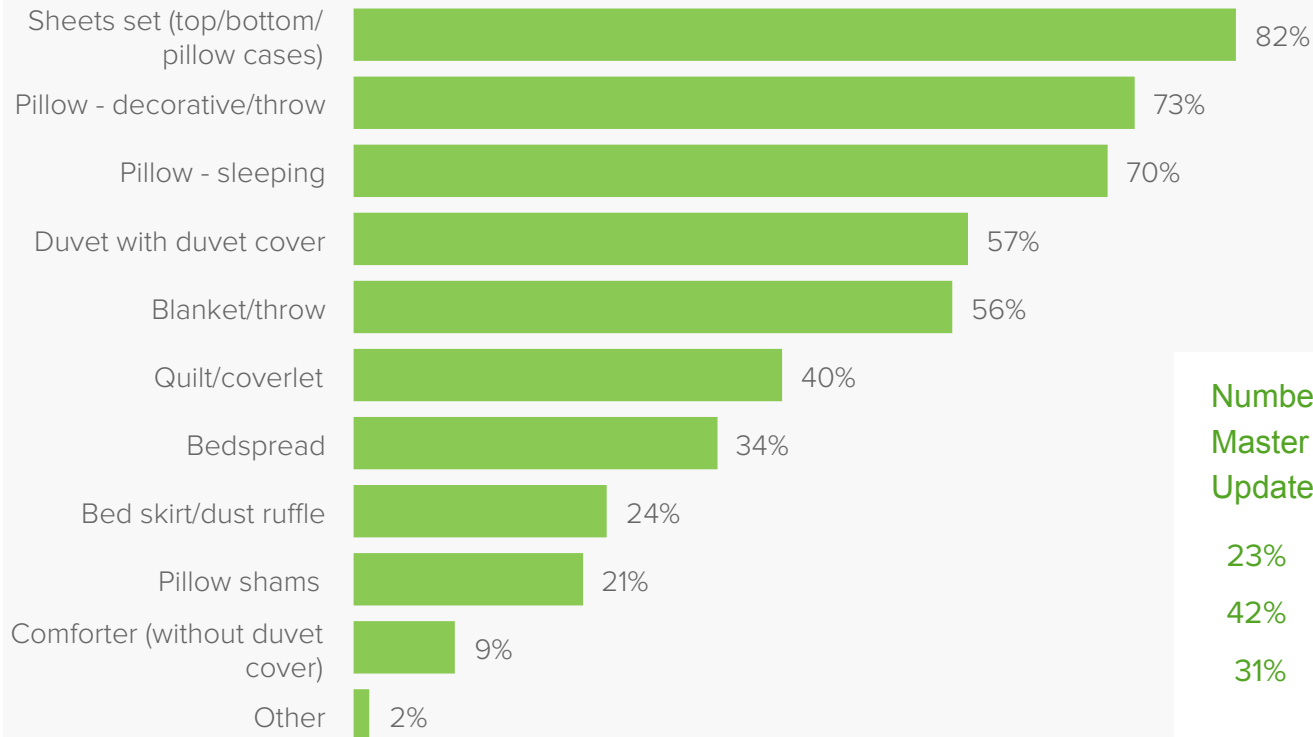


*Percentages reflect proportion of homeowners *who are updating small décor* as part of their completed, current, or planned master bedroom *decorating* projects.

Pillows Galore!

Two thirds of decorating homeowners (66%) are updating bedding during their master bedroom project, which includes a wide assortment of elements. Eight in ten (82%) claim that sheet sets are at the top of their list for new bedding. Decorative pillows have also proven popular, with three in 10 homeowners ending up with five or more after their updates.

NEW BEDDING TYPES IN MASTER BEDROOM BEDDING UPDATES*



Number of Decorative Pillows in Master Bedroom After Bedding Updates*

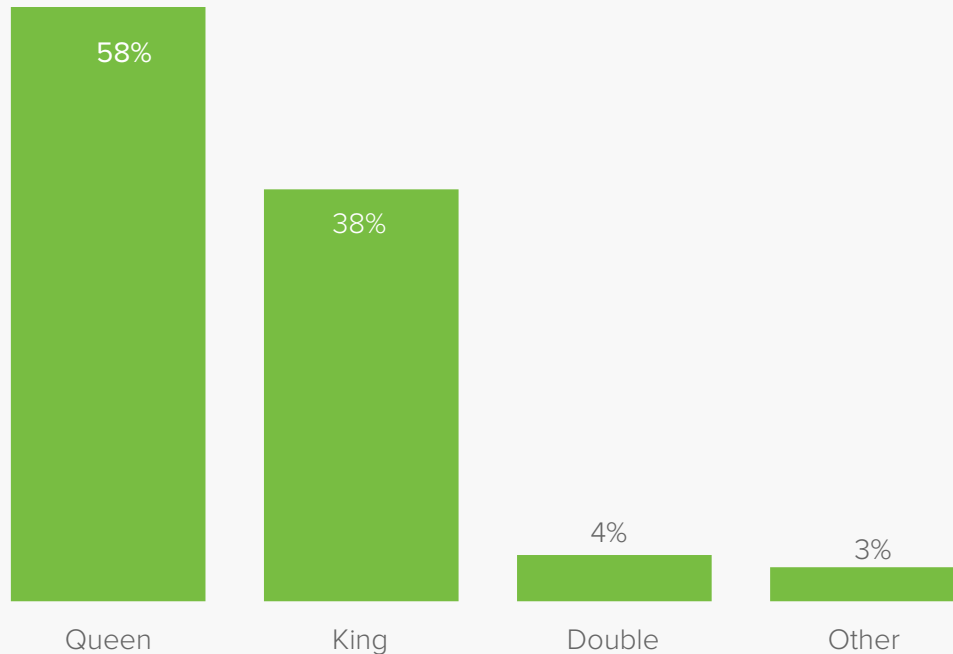
| | |
|-----|-----|
| 23% | 1-2 |
| 42% | 3-4 |
| 31% | 5+ |

*Percentages reflect proportion of homeowners *who are updating bedding* as part of their completed, current, or planned master bedroom *decorating* projects.

Fit for a Queen

When it comes to the new bed size in master bedrooms, More than half (58%) of decorating homeowners purchased queen size beds, followed by king size beds. Beds in non-master bedroom are most commonly queen sized too (36%), followed closely by single sized (25%).

NEW BED SIZE IN MASTER BEDROOM BED UPDATES*



New Bed Size in Non-Master BR Bed Updates

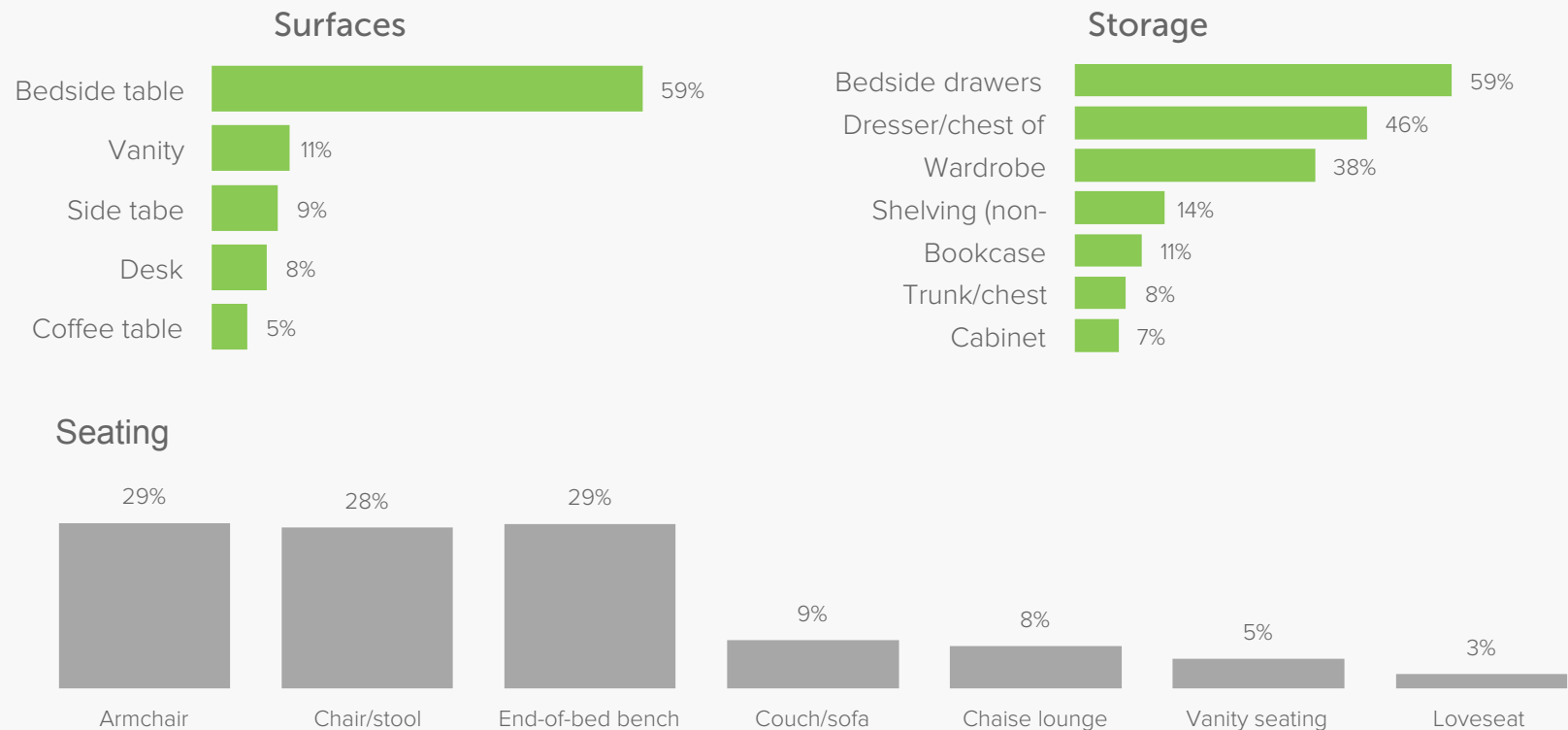
| | |
|-----|--------|
| 36% | Queen |
| 25% | Single |
| 23% | Double |
| 11% | King |
| 11% | Other |

*Percentages reflect proportion of homeowners *who are updating the bed* as part of their completed, current, or planned master bedroom *decorating* projects.

Seating, Surfaces, Storage

Among those homeowners who are updating furniture and surfaces during a master bedroom decorating project (51%), bedside drawers and bedside tables are the most common purchase (59%), followed chest of drawers (46%). Over a quarter (29%) are investing in end-of-bed benches, combining seating and storage.

NEW FURNITURE TYPES IN MASTER BEDROOM FURNITURE UPDATES*

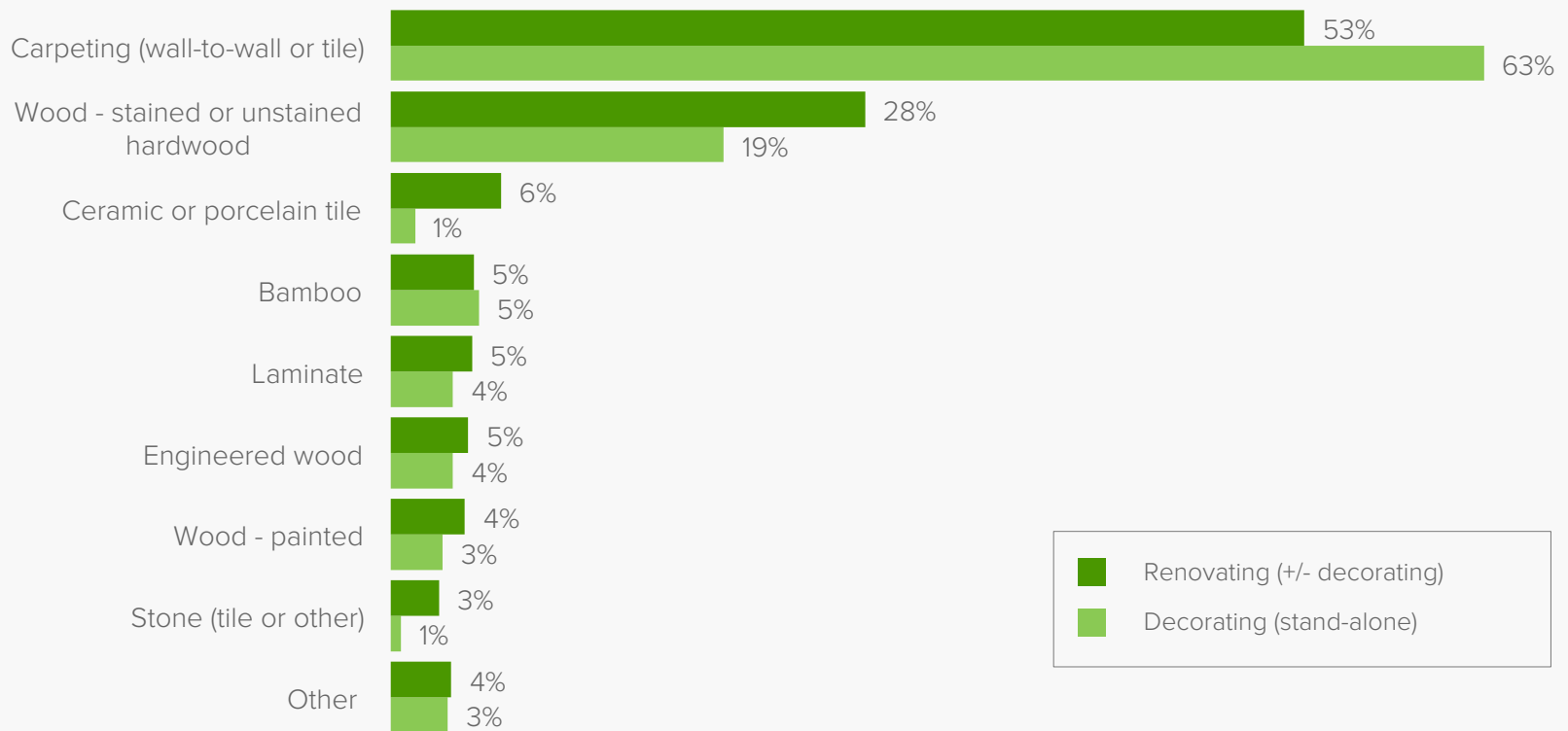


*Percentages reflect proportion of homeowners who are updating furniture as part of their completed, current, or planned master bedroom decorating projects.

Carpet is Right

Homeowners who are renovating and decorating their master bedrooms place an importance on replacing the flooring (72% and 38%, respectively), with above half (53% and 63%, respectively) opting for carpet. Homeowners are almost twice as likely to carpet their master bedrooms than opt for wooden floors.

NEW OR REFINISHED MATERIALS IN MASTER BEDROOM FLOORING UPGRADES*

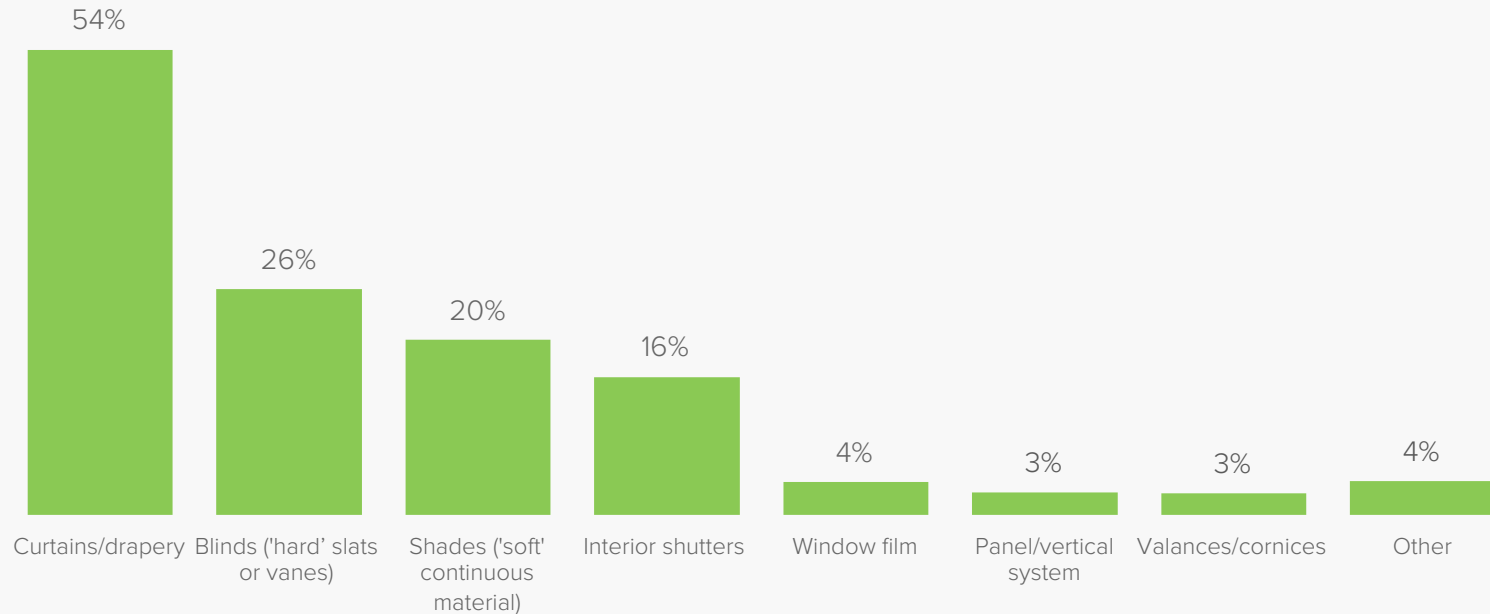


*Percentages reflect proportion of homeowners who are upgrading flooring as part of their completed, current, or planned master bedroom projects.

Curtains vs. Blinds

There's an obvious choice among those updating window treatments in their master bedroom (64%), curtains and drapery are the top choices (54%), followed by a variety of blinds. One fifth choose shades, and over one in ten are opting for interior shutters.

NEW WINDOW TREATMENT TYPES IN MASTER BEDROOM WINDOW TREATMENT UPDATES*

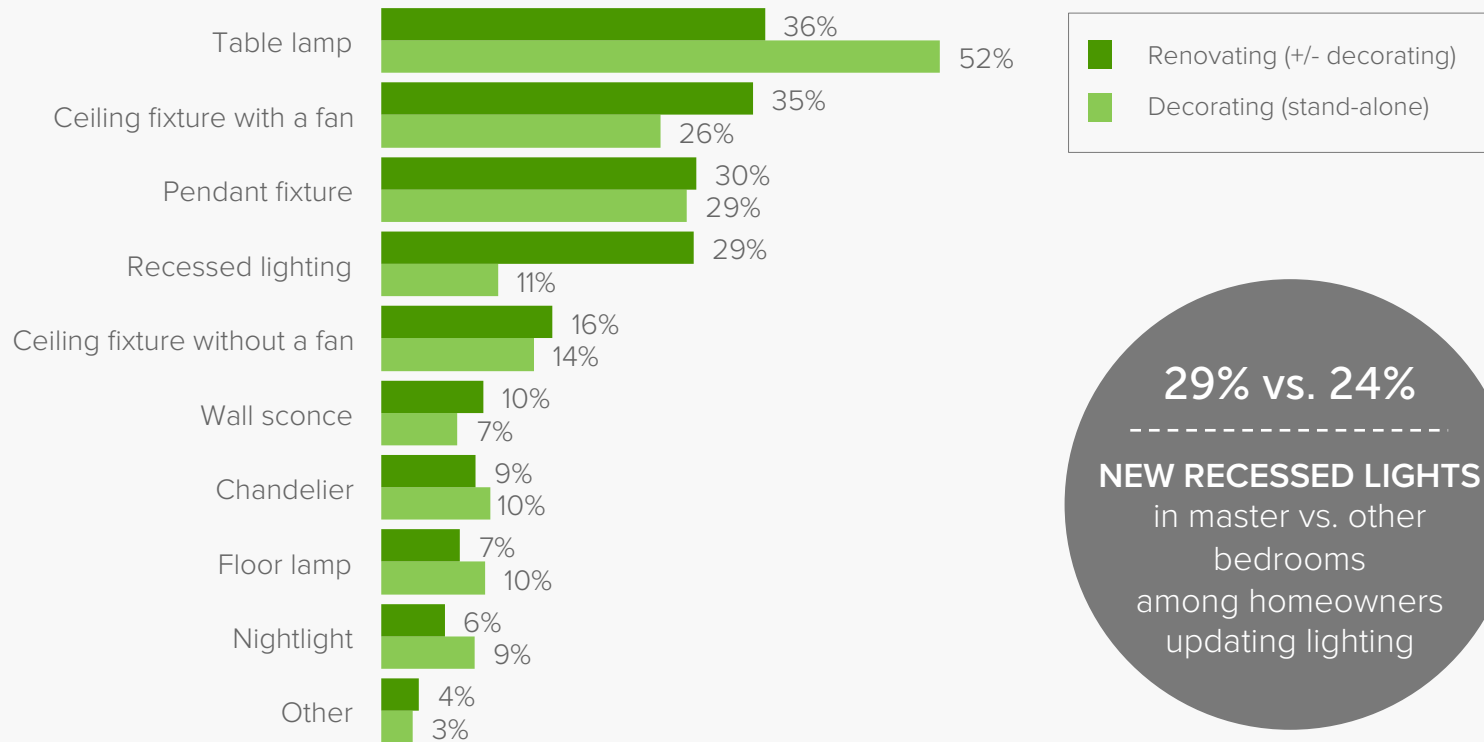


*Percentages reflect proportion of homeowners *who are updating window treatments* as part of their completed, current, or planned master bedroom decorating projects.

Illuminating with Standard Lighting

Lighting fixtures are much more likely to be upgraded during or just after a renovation than during a stand-alone decorating project (79% vs. 54%, respectively). Table lamps are the top choices for both.

NEW LIGHTING FIXTURES IN MASTER BEDROOM LIGHTING UPGRADES*

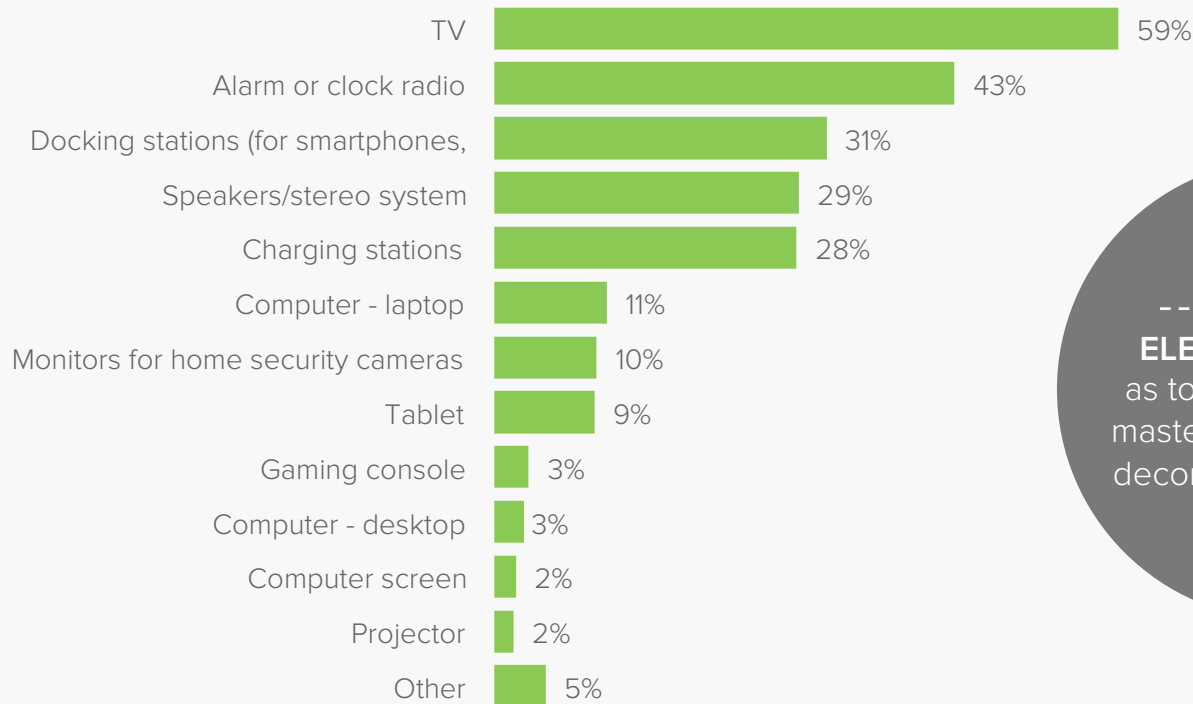


*Percentages reflect proportion of homeowners who are upgrading lighting as part of their completed, current, or planned master bedroom projects.

Divided on Devices

Nearly a fifth of decorating homeowners commit to keeping their bedroom electronic and media free (18%), nearly two out of ten will replace or purchase new electronic items and appliances (15%). Televisions are the most popular purchases, and one in ten are opting to bring in a monitor home security from the master bedroom.

NEW DEVICES IN MASTER BEDROOM ELECTRONICS UPDATES*



18%

ELECTRONICS-FREE
as top design aspect of
master bedrooms among
decorating homeowners.

*Percentages reflect proportion of homeowners who are adding or replacing electronics as part of their completed, current, or planned master bedroom decorating projects.

Methodology

The survey was sent to registered Houzz users in Australia and fielded in October and November 2015.

Homeowners who completed a bedroom renovation or decorating project in the past 12 months, are currently working on one, or plan to start one in the next three months shared their plans and progress in our online survey. N=5826.