ring

Home: A New Meaning



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Introduction.

2020 has been a year of unparalleled change across the world, driven most notably by Covid-19 (Coronavirus).

Along with major impacts and changes to global economies and networks, our individual lifestyles have seen the most turbulence and change as we adjust to the new normal.

In a very short timeframe, our consumer habits, movements and daily practices have had to rapidly adapt to the diverse range of lockdown measures, brought into effect around the world.

The shift to remain at home has been immense, and has quickly moved our lifestyle practices from the outside to the inside. Starting with 'work from home' mandates, we soon found ourselves socialising, (via online meeting platforms) shopping, and even exercising from home.

Our mission at Ring is to make neighbourhoods safer. This ethos drives the products and services we design and the decisions we make.

Starting with our original Video Doorbell, and spanning across a range of products including Security Cameras and Ring Alarm Security System, our focus lies in creating closer connections between people and their homes, no matter where they are.

With this mission in mind, this research report sets out to uncover the impact that more than 12 weeks of remaining at home has had on consumers' attitudes towards the physical spaces they call home.

of participants defined their homes as places of attachment to all of their belongings linked to important memories.

defined the meaning of their homes in relation to family and the people they share their home with.

also viewed their homes as spaces that have been created and decorated to make people happy.

To achieve this, we worked with an independent research team to conduct a survey amongst 2000 people across the United Kingdom, featuring questions designed to uncover what home now means to people and to explore how consumers' relationships with their home might have changed - for better or worse.

Alongside this representative consumer research, an expert in the field of interior design - Samantha Watkins McRae offers her insight into how lockdown has changed home layouts, and what impact this will have in the future.

Additionally, we sought the expertise of Dale Southerton, a professor in Sociology of Consumption and Organisation from the University of Bristol, to explore the changing intersection between contemporary homes, domestic spaces and emerging technologies.



Defining the home.

A consistent reference point that threads through the narrative of human history is that of the home.

Almost every civilization, culture and country is familiar with the social and physical construct of a home, across the spectrums of both geography and history.

Traditionally, homes have signified places of refuge, comfort, and safety. As such, these are the spaces in which our interior lives develop and unfold, threaded together by the connections between family, community, and the individual self. This is largely underpinned by our understanding of the home as a private space in which we retreat from work, relax, and engage with those closest to us.

Southerton notes, "Any study of the home will begin by confirming that the home is a safe haven, a place we feel most relaxed or can truly be ourselves.

They are spaces into which we retreat from work and the outside world, whether we do so for some solitude, quality time with those we care most about or simply to recuperate.

In a context where the walls of our home have become our first line of defence from the outside world, this sense of sanctuary is exacerbated. Our understandings of the home as a private space, juxtaposed with the impositions of the public world, also underpins the ways in which we understand our homes."

According to our survey data, 53% of participants defined their homes as places of attachment to all of their belongings linked to important memories. Others (49%) defined the meaning of their homes in relation to family and the people they share their home with.

Of all participants, 41% also viewed their homes as spaces that have been created and decorated to make people happy.

This ties in closely to the question of personal identity, and how it intertwines with our homes. In this regard, 61%* of consumers agreed that their homes act as an extension of themselves, and represent who they are as people.

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Changes to our homes in 2020.

As sociologist Dale Southerton points out, "The past few months have placed a heightened focus on our homes as places we share with family and friends, as private spaces from which to retreat from the outside world, as places that represent our identities, and as busy environments in which day-today activities collide.

In many respects, there is nothing new about these features of home, but the intensification of them under conditions of 'lockdown' and social distancing raise a whole new set of tensions that the British public are seeking to resolve in diverse ways."

Based on this shift toward "busy environments in which dayto-day activities collide", our research data indicates that people have made a number of improvements to their home environments in order to accommodate this shift. According to interior designer

> **47%** of consumers have done a clear out.

57% of consumers have adapted their homes to serve new purposes.

19% have converted

their living rooms or garage/garden spaces into work areas.

11% have been using different rooms as home gyms.

Samantha Watkins McRae, this coincides with the trend over recent years of people looking for creative ways to make their homes work harder for them, to provide more functional space in their home, rather than simply moving on to a new property.

In particular, our survey results indicate that decluttering the home is the most popular home improvement to take place during lockdown, with 47% of consumers having done a clear out. From the perspective of interior design, this touches on the question of storage, which according to Watkins McRae, "has always been a priority for people."

The function of the home has also changed, as 57% of consumers have adapted their homes to serve new purposes, with 19% having converted their living rooms or garage/ garden spaces into work areas or other different uses. Other ways in which consumers are changing the function of their homes includes using different rooms as home gyms (11%), and using their living room as a hub for small businesses or their garage as a production hub for business/creative projects (10%).

This correlates with the general emergence of more multi-use spaces, such as spare bedrooms that convert into home offices, or the purchasing of modular furniture like stow-away beds and tables.

"We're seeing sliding doors and dividers used more often to make more efficient use of a room's space, or to hide an office or gym. This also allows consumers to connect with spaces as and when they choose, giving them more flexibility", says Watkins McRae.



The move towards greener homes.

Another key trend emerging from the survey research is that of buying houseplants, with 24% of consumers having added more greenery to their living spaces.

"This is the new reality of homelife; homes are both sanctuaries and places of constraint. It is perhaps no wonder that people are adding houseplants to enhance the aesthetic qualities of their homes", marks Southerton.

On top of this trend towards greener spaces, Watkins McRae points out a notable shift towards environmental awareness when it comes to our interior spaces. She notes, "With lockdown in effect and many aspects of life on pause, there has been a revived appreciation of nature. Consumers aren't just looking at creating greener spaces within their homes, but also at how they can have a positive impact from the perspective of environmental sustainability."

"We've seen the popularity in materials such as re-purposed plastic bottles spun into yarns or discarded components that would otherwise find their way into landfill, given a new life with a conscience. People are definitely prioritising this now more than ever."

She further points out the emerging trend of Biophilia within interior design, which sees people creating a garden environment indoors and bringing with it the health and wellness benefits of being closer to

The impact of an unprecedented amount of time at home.

With most people having spent more than 12 consecutive weeks at home, a general shift in attitudes towards the home is to be expected. Perhaps surprisingly to some, the changing attitude of people towards their homes has been favourable, with 53% of Brits expressing that the way they view their homes has changed in a positive way since lockdown started.

According to our survey data, the primary reason for this positive change in sentiment towards the home is due to viewing the home as a place of comfort and sanctuary (67%), followed by people enjoying spending more time at home every day (53%).

For those who haven't had a positive change in sentiment towards their home, growing tired of being inside the same space all day is the main reason (47%). It should be noted however, that this data reflects the general tension between the concentration of people in homes and those who live alone.

In this regard, Southerton points out that "the number of people living together within a single home is on the rise, with 12% of homes having added new family members during the lockdown period. Students returning home from University, young adults preferring to be locked down in family homes or older relatives selecting to isolate with family or friends are probable reasons for this increase."

Our survey also reveals that despite prolonged time spent with the same people in lockdown and a prediction that people may grow tired of each



other, relationships between people at home are strong, with almost 3 in 5 (58%) not having felt the need to spend more time on their own away from those they live with than before.

Interestingly, the need to spend more time alone is highest amongst the younger generation, as 66% of 16-24 year olds have needed more time away from those they live with than before, compared to 22% of those aged 55 and above.

Conversely, awareness and concern that those living alone are even more cut-off from their wider communities has been high, which speaks to the general importance of people's needs for a sense of community and belonging.

On this point, Southerton points out that "we may be more concentrated in terms of people within homes and in terms of the time we spend with them or we may be feeling more isolated, but in both cases connections and interactions with our local communities have become all the more important."

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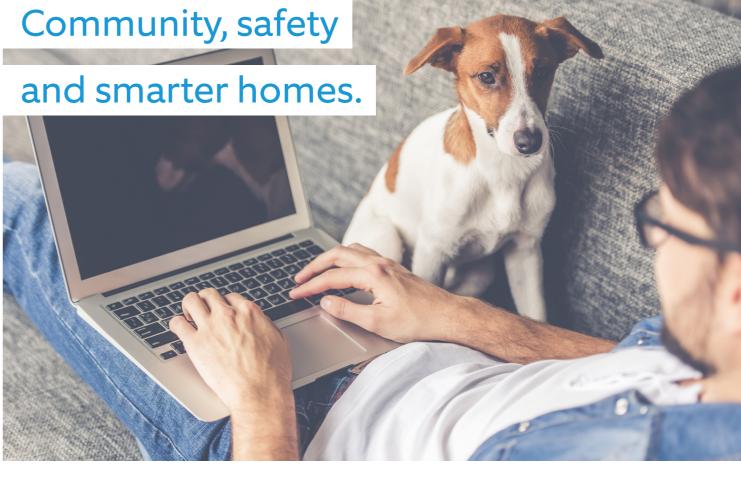
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Tightly bound up with the construct of the home is that of community. From acts of kindness for neighbours in need, to the weekly NHS clap for carers, the lockdown period acted as an important catalyst in solidifying and reinforcing ties within and between local communities.

Closely tied to a feeling of community, is the feeling of safety. Survey data shows that when thinking about the general safety of their homes, 27% of consumers feel that their home is safe due to getting to know their neighbours better during lockdown.

As for home security, almost two thirds of consumers (64%) observed that time spent at home during lockdown has made them more protective of their homes. Further, 39% say they have taken more care in

the appearance of their home, and 25% are now actively considering the security of their

From the perspective of homes becoming 'smarter', the extended lockdown period led to 10% of consumers investing in smart home technology as part of their home improvement and security efforts. This coincides with a general shift in people's relationships to smart

home technology, with 17% of consumers now using video doorbells for contactless delivery on their doorstep or security cameras for communicating with elderly relatives.

By looking at these two trends of increased security consideration and smart home technology adoption in combination, we begin to see consumer behaviour that goes beyond only solving day-to-day practicalities.



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homes.

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Predicting future changes.

Considering the impact that 2020 has had on the way that we perceive and connect to our homes, the question arises as to what kinds of lifestyle and home trends can be expected going forward.

On a broader scale, a trend towards multigenerational living has begun in the UK, with 13% of consumer homes now having family members or students home, who had planned to be travelling or at university.

From the perspective of interior design, Watson McRae points out that "based on what has happened this year, our personal spaces will form even more of a sanctuary.

Where consumers previously would have looked to spend money on wellness and comfort achieved outside of the home, they will now be looking to recreate this at home.

Similarly, she observes that with "working from home becoming the default for many, the need to create a space to do this in will continue to be important."

"We all face a unique set of challenges as we've all been plunged into a new way of working – from video calls to solo tea breaks. We therefore need to come up with solutions as this working from home trend continues."

"It's important to find a way to fully switch off at the end of a working day - and that's especially true when you're working from home," Toni Radzihovska, Head of Alexa Smart Home EU, at Amazon explains. "From discovering new music to setting those evening lights ready to relax, smart home

technology can help separate your work time from your play time."

This sentiment reflects Ring's survey data, which shows that following lockdown, over a quarter (27%) of Brits are reassessing how they can adapt their home space for the future.

Considering the possibility of more time spent at home going forward, it is unsurprising that consumers have become more interested in having outdoor space (36%), quiet neighbours to help with concentration during the day (21%) and a spare bedroom for storage and other activities (20%).

In looking at home 'setups', and considering that 64% of people now feel more protective of their home since lockdown, even more may be looking for ways to protect their space.

Smart home products in the home space are therefore an important consideration for the future, with almost a third of consumers looking to feature home security products (30%) and nearly a quarter (23%) looking into home office technology when designing their spaces going forward.

Looking ahead, it therefore seems that consumers' intentions to adapt their home spaces will coincide with the trend of smart home technology.

Regarding what homes will mean to consumers in the future, Southerton points out that this will come down to the various tensions that have been explored in this report so far: the tensions between populated homes and isolated homes, between the home as

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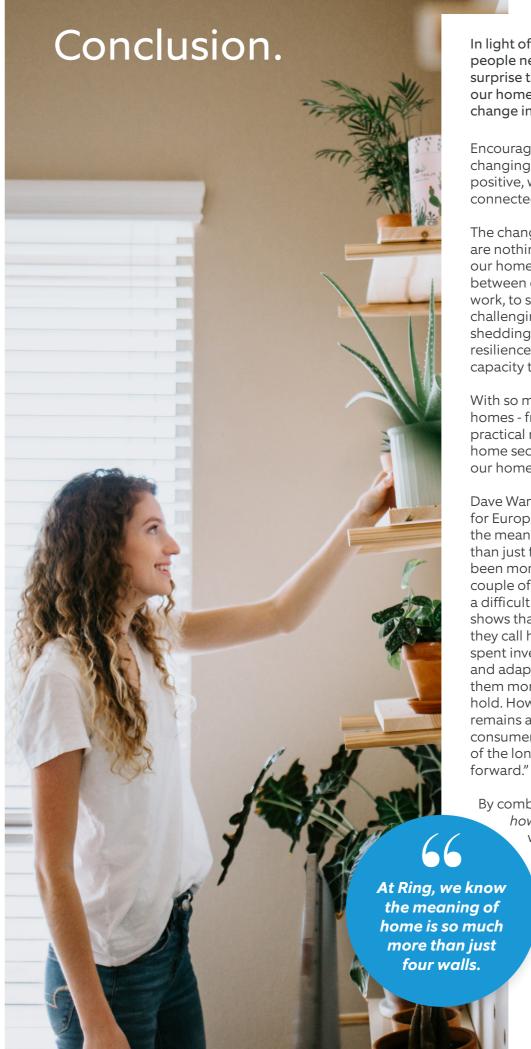
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a sanctuary vs. as a place of business, between the home as a public vs. private space. Inevitably, "how we seek to manage and create boundaries between all of the activities that take place within homes will determine what new meanings of home emerge in the future.

At the centre of these tensions is how households work with and incorporate a whole range of inter-connected digital technologies and services into their day-to-day lives."



In light of the many lifestyle changes that people needed to adopt in 2020, it is no surprise that the relationship we have with our home has experienced unprecedented change in a remarkably short time frame.

Encouragingly, our survey data shows this changing dynamic to be predominantly positive, with most of us feeling more connected to our homes than before.

The changes we're currently witnessing are nothing short of a paradigm shift, with our homes turning into intersection points between every aspect of our lives - from work, to social, to wellness and more. As challenging as this is for many, it is also shedding light not only on our collective resilience and adaptability, but also on our capacity to think and act creatively.

With so many people re-imagining their homes - from interior design facelifts to practical renovations, all the way through to home security improvements - the future of our home lives looks increasingly positive.

Dave Ward, Managing Director of Ring for Europe comments: "At Ring, we know the meaning of home is so much more than just four walls and this has never been more apparent than over the past couple of months. After what has been a difficult time for so many, our research shows that people appreciate the spaces they call home now more than ever. Time spent investing in home improvements and adapting their home space has made them more aware of the value their homes hold. How to keep homes secure therefore remains an important consideration for consumers and one we predict will be part of the longer-term changes as we move

by combining this heightened sense of how we want our homes to serve us with the growing trends toward greener, smarter, and more secure homes, it looks as if we are setting ourselves up for more time well spent at home, regardless of what the next few years will bring.

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