

SAMSUNG

Decentralised Living

From lockdown habits to a new way of living

2020



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The evolution of decentralised living

Covid-19 has meant our homes now play a bigger, more varied, role in our lives than they did before. As well as being a place for us to relax, sleep and eat, they're now our workplaces, our gyms and, thanks to video connections, the hub of our social lives.

But what do the changes we've had to make to our lives mean for the way we think and feel about our homes? What has been the impact of decentralised living on our lifestyles and relationships? How have we changed as people? Are these changes simply to help us manage our lives through this difficult time, or do they herald more fundamental, long-term shifts?

To find out, we asked more than 10,000 people in ten countries across Europe about how the virus has changed the way they think about their homes and the impact it's had on their lives.

We asked them about the changes they've made to what they spend their money on, and how it has altered the way they relate to each other and to the wider community.

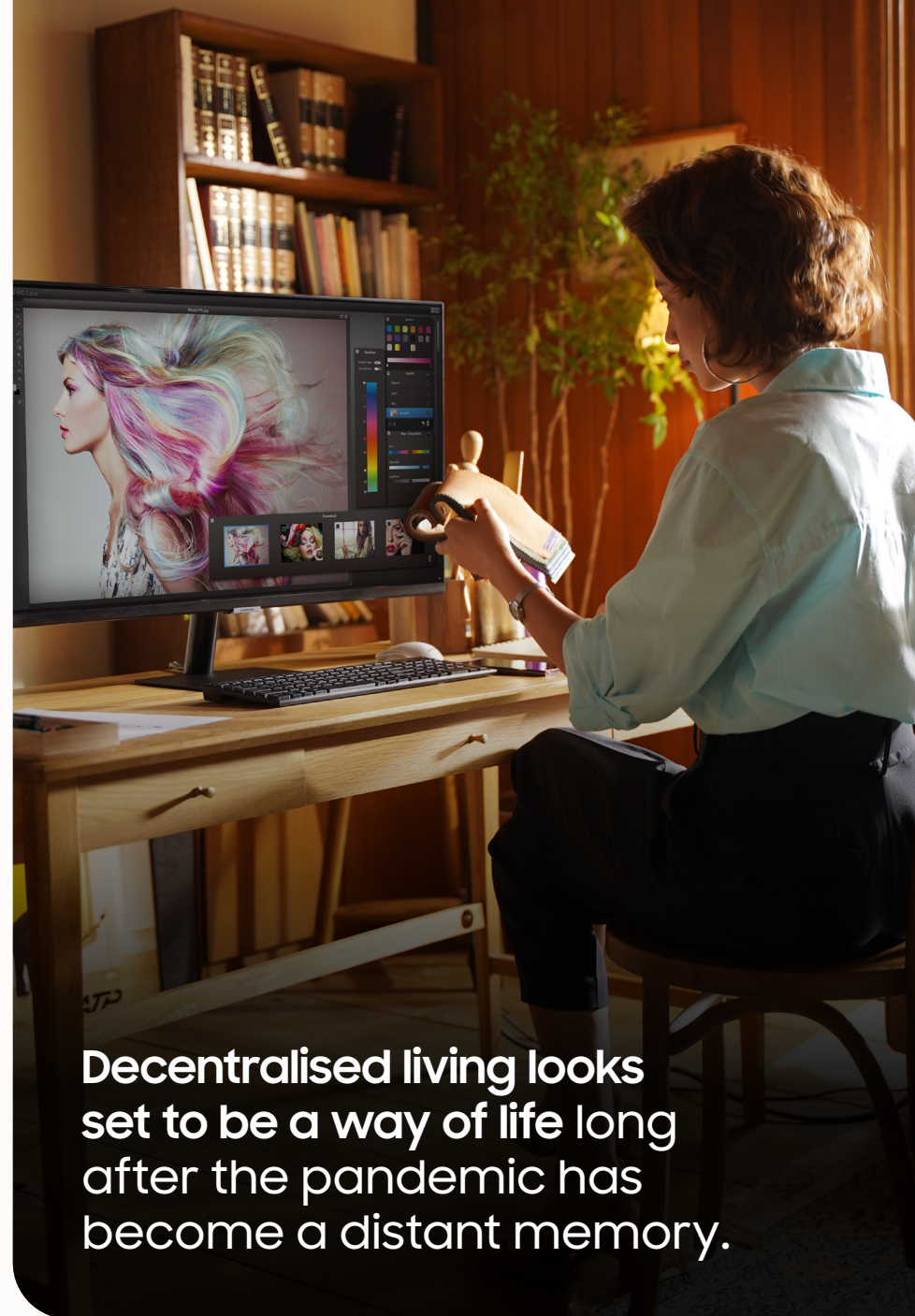
The findings show how technology has allowed us to continue to connect with other people throughout the crisis and transformed the way we build and maintain relationships. We are doing things from our homes we would never have done before. We're trying out new activities, meeting new people, pushing our personal boundaries further than we've done in the past.

Covid-19 has led us to refocus our lives. It has also caused us to place even greater value on our homes, made us re-evaluate our relationships and forced us re-think how we connect with each other.



Benjamin Braun

Chief Marketing Officer for Europe
Samsung



Decentralised living looks set to be a way of life long after the pandemic has become a distant memory.

What we value in our home environment

Our survey demonstrates the extent to which our homes are taking centre stage in the way we cope with the impact of the virus and manage our lives through these challenging times. Indeed, the findings suggest the pandemic has made us feel differently about what we actually mean by the word 'home.'

Across Europe as a whole, around a third of us (32%) are currently working from home. Not all the extra time we are spending there, however, is being spent on our jobs: the survey found we've also expanded the range of activities that take place in our households. More than four in ten (41%) of us are now doing things at home that we would not previously have done.

As a result, our homes have taken on a new meaning. Just under two-thirds (64%) of us now see home as our safe space. This trend was particularly noticeable in Spain, where three-quarters of people agreed their home had become their safe space since the pandemic.

Across Europe as a whole, around two in five (39%) of us – see our homes as a place to express ourselves more now than before the pandemic. More than half (53%) of people in Poland think this is now the case, but right across Europe it's evident that the impact of the virus has meant we are nurturing our homes as never before.

We're also paying more attention to them. More than a third of Europeans (37%) say they now care more about how their home looks than they did prior to the pandemic, while more than two in five of us (42%) have embraced the idea of nesting chic: we've bought things to make them a better place in which to spend our time. The survey however revealed sharp differences between the countries we surveyed: more than half of Poles (51%) said they had bought something to improve their home environment, compared with fewer than a third of people in the Netherlands (32%).



Our perception of and relationship with our home has changed significantly since the start of the pandemic.

64%

Since the outbreak of the pandemic, my home has become my safe space.

39%

I see my home as a place for expressing myself more now than I did before the pandemic.

37%

I care more about how my home looks now than I did before the pandemic.

42%

Since the outbreak of the pandemic, I have bought things for my home to make it a better place to spend time in.

What we value in our home environment (continued)

This new way of thinking about our homes is prompting us to ensure the way they're laid out matches our decentralised lifestyles. More than three in five (62%) Europeans believe it's important for them to have a place in their home that allows them to separate work from daily life. A fifth (22%) even think it's important to have impressive items that would look good as a backdrop to their video calls. A quarter of men (25%) think this is the case, compared with one in five women (19%). It was the Italians who cared most about their backdrop (31%), the survey found, while at the other end of the scale the Norwegians were the least concerned about the appearance of their video backdrops (7%).

We're also spending our extra time at home keeping fit. More than half think it's important for there to be a place for them to exercise, with the Italians (66%) and Spanish (62%) scoring highest in this regard. This desire was most notable among those aged between 25 and 34 across Europe, where more than three in five (63%) felt it was important to carve out space for exercise, but more than a third (35%) of those aged 65 or over also thought this was something they would now like to have in their homes post-lockdown.

Our desire to reconfigure or upgrade our homes also applies when it comes to cooking. More than two-thirds (68%) think it is important for them to have an improved kitchen setup, perhaps reflecting the greater interest in cooking the pandemic has produced.

It was the French who scored highest here: nearly nine in ten (87%) felt it was important to improve their cooking facilities, while at the other end of the scale fewer than half of Norwegians (49%) saw this as an important factor.

So, our research has found that across Europe, we are reconfiguring our homes to better suit the more central role they are playing in our lives thanks to decentralised living. But how has that affected our shopping habits?

What's evident from the findings is that, across Europe, this shift in perception about our homes is changing the things we buy, and what we buy them for. Before the outbreak, functionality and comfort were the primary considerations for purchases for the home, followed by style and aesthetics. Now, while comfort remains an important factor, there is a greater emphasis on emotional impact and wellbeing: a third (33%) now believe the emotional impact is more important for them, when considering what to buy for their home, than it was before lockdown began. More than a fifth (22%) of those we surveyed now think the aesthetics of their purchases are more important than they were before the pandemic. More than a quarter (27%) of Italians and Poles think this is the case, compared with just over one in 10 (12%) of Norwegians and Dutch people. Meanwhile a fifth of people across Europe as a whole – but again led by those in Italy (25%) – also think it's more important that their purchases match their sense of style.

While comfort remains an important factor, there is a greater emphasis on **emotional impact** and **wellbeing**.

When buying things for our home, our priorities have changed.

37%

Agree that the **comfort** of new purchase – whether it makes life at home more comfortable – is more important now than before the pandemic.

31%

Agree that the **functionality** of a purchase – whether it does what it needs to do and is easy to use – is more important now than before the pandemic.

20%

Agree that the **style** of a purchase – whether it fits with their sense of style – is more important now than before the pandemic.

33%

Agree that the **emotional impact** of a purchase – whether it improves their mental or emotional wellbeing – is more important now than before the pandemic.

22%

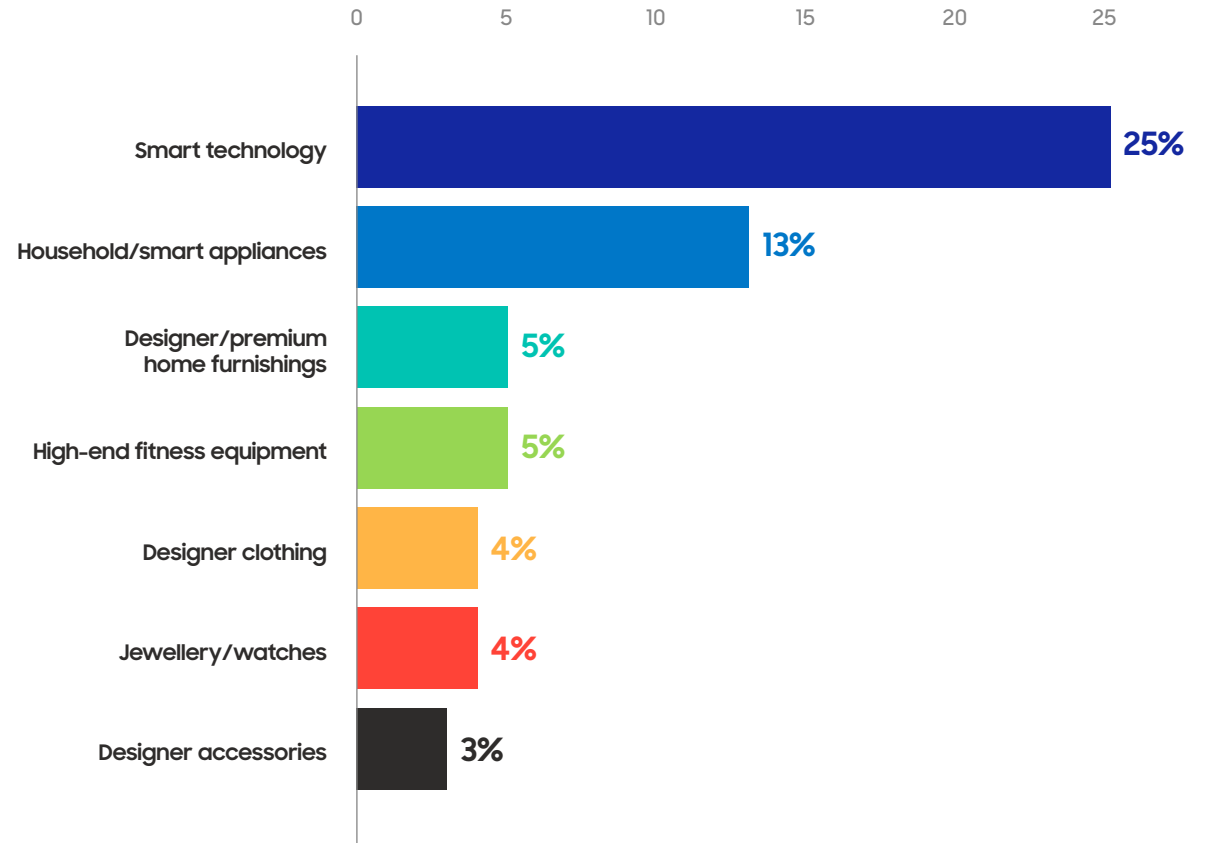
Agree that the **aesthetics** of a purchase – how it will look in the home – is more important now than before the pandemic.

What we value in our home environment (continued)

The new role our homes are playing also appears to be causing us to think more about the technology we are buying. Technology, after all, has allowed us to communicate with our work colleagues, our family and our friends throughout the pandemic. It has made lockdown more bearable.

Our survey findings told us about the priorities we now attach to technology compared to other items. When asked how they might spend some imaginary spare money, a quarter (25%) told us that, they would be most likely to spend it on smart technology – from the options provided – reflecting the importance of staying connected during the current uncertain times. The figure was particularly high for Italy and Spain, where 33% said they would be most likely to spend this spare money on smart technology, while the trend was less noticeable in Norway, where just 19% said the same.

Indeed, more than six times as many Europeans would buy smart technology first compared with those who would buy designer clothing. The next highest priority were household appliances, which 13% would be most likely to buy. Meanwhile 5% of Europeans would be most likely to buy high-end sport or fitness equipment, or designer home furnishing, followed by jewellery (4%) and designer clothing (4%).



Imagine you had a spare amount of money to spend. Which, if any, of the following items would you be MOST likely to spend it on?

More than **six times** as many Europeans would buy smart technology first compared with those who would buy designer clothing.

What we value in our home environment (continued)

These shifting priorities are reflected in our intended purchasing decisions over the next 12 months. More than half (52%) said they would be likely to buy a new home appliance such as a washing machine or a microwave, while more than two in five (43%) were likely to purchase technology for home entertainment such as smart speakers or TVs.

And it's not just the big-ticket items that are attracting our attention: more than a third (36%) also say it is likely they would buy a smart tech-enabled item such as lighting or a doorbell over the next year.

The Italians led their other European counterparts here, with 46% saying they would probably make such a purchase, while the least likely were the Belgians, with just under one in three (28%) saying they would do so.

Meanwhile, across Europe as a whole, more than a third (34%) told us they were likely to buy health or fitness technology such as an indoor bike, a smart watch or a fitness monitor over the next year. The figure was highest for those aged 25 to 34, where a half told us this was a likely purchase over the next 12 months, but even one in seven of those aged 65 or over told us they would be likely to do so.

That desire to protect the environment is evident when we asked our respondents across Europe about their reasons for purchasing a new home appliance. While practical drivers were key when purchasing decisions were made, that was followed by energy-efficiency and quality. Although nearly six in 10 (58%) said any purchase would be to replace a broken existing piece of equipment, 30% said it would be to get a more energy-efficient model. Nearly one in five (18%) said it would be to buy something that fits in more with their lifestyle needs. It was the older groups which prioritised replacing broken models: by contrast, younger people tended to opt for quality and lifestyle suitability. While it's evident then that the need simply to replace something that no longer works remains most important, a greener lifestyle more in keeping with the new place the home plays in our lives also now appears to be a significant factor.

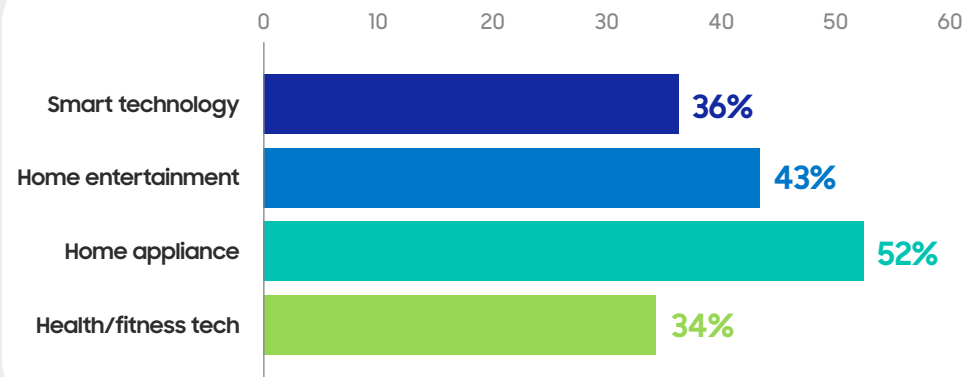
The pandemic then has forced us to rethink our homes and our living spaces. It's also made us think more carefully about how they look and what we buy for them. But what has been the impact on ourselves? Just how far has decentralised living made us recalibrate our lives as well?



Across the countries we surveyed, 47% think it's important to have more **advanced smart technology** or **household appliances** in their home.

The Italians were the keenest to embrace such technology our survey found: more than seven in 10 (71%) of those we surveyed in the country felt this was important for them.

Proportion of Europeans likely to make tech purchases in the next 12 months.



How the pandemic has affected our personal connections, lifestyles and relationships

The survey so far has found that our homes are now more important to us, and we've shifted our spending so we can better stamp our own personalities on them.

But the next set of findings demonstrate that the impact of the virus has been felt beyond the home: it's affected our relationships, our family traditions and the way we connect with people. And the results suggest things will not revert to their old pattern once Covid-19 has passed: many of the changes are likely to become a permanent feature of our lives.

The survey indicates we've used the extra time we've been given in lockdown to undertake a wider range of activities, to become more rounded individuals. Decentralised living has allowed us to broaden our horizons and challenge ourselves to do things differently.

Across Europe – perhaps unsurprisingly – top of the list of things we've started doing for the first time, or started doing more of, were video calls with our friends and family (37%). But in second place came spending time and being creative in the kitchen: 29% said the pandemic had prompted them to cook meals at home more often or for the first time.

The third most popular activities were virtual work meetings, alongside online or in-home workouts: more than a fifth (22%) of us have taken these up, the Italians followed by the Spanish being the leaders in this regard (30% and 29% respectively). It's evident we are all determined to get the most out of those exercise spaces or improved kitchen setups that are now important to us.

Started/did more often during COVID

Of those who started or did it more often... Want to continue doing once all restrictions are lifted

| | | |
|------------------------------------|-----|-----|
| Cooking at home | 29% | 78% |
| Online or in-home workouts | 22% | 60% |
| Decorating or upgrading the house | 19% | 66% |
| Pursuing a new hobby | 17% | 74% |
| Learning a new skill | 13% | 76% |
| Video calls with friends or family | 37% | 50% |

Our lockdown hobbies and habits are here to stay.

Just under a fifth (19%) of us have either started, or devoted more time to, decorating; the Poles and the British apparently being keenest to pick up their paintbrushes during lockdown. More than one in six (17%) of us have found more time for a hobby or have started a new one. Thirteen % of us are learning a new skill, such as a language or musical instrument. While the survey found that those aged between 16 and 24 have been the most adventurous during the pandemic, being more likely to try new things than the other age groups, it's evident that for all of us life under lockdown is allowing us to push ourselves; to try new things and acquire new knowledge.

And it doesn't look like we're embracing these new activities simply to fill up the extra time at home we've been given. The survey suggests we seem to be acquiring a liking for these newly found tastes: many of us will maintain them when our lives return towards normal. Across the continent as a whole for example, 78% of those who had taken up cooking for the first time or did it more often than before the pandemic would like to continue to do so, even if there are no travel or other restrictions a year from now. Three in five (60%) of us plan to carry on with online workouts, while half (50%) plan to carry on video calling family or friends even after all restrictions are over.

The technology we've relied on has also enabled us to build deeper relationships, grow more connected with people around us and catch up with long-lost friends. More than six in 10 (62%) of those we questioned across Europe said technology had allowed them to stay in touch with the people who mattered most to them. More than half (53%) said they'd used virtual technology to stay in touch with friends who lived far away. For more than two in five (43%), it's even meant they've been able to connect with their friends more often than usual.

It's not just friends who have been brought closer together: families too have been able to connect throughout the epidemic. Across Europe as a whole, two in five people (39%) said they'd spoken to family who don't live with them more often since the pandemic started. This trend is most pronounced in Spain, where 53% agreed they'd been able to reconnect more since the virus emerged. And video technology has been no barrier to having a personal conversation with those closest to us: 39% said they felt as comfortable having such a conversation with a friend via a video call as they did in person.

Socialising via video calls isn't going anywhere

58%

Agree that maintaining meaningful connections with family has been made easier through the use of technology during the pandemic.

50%

Of those who started video calling friends or family or did it more often during the pandemic, want to continue doing so, even once lockdown restrictions are over.

53%

Would reconsider attending a gathering with friends that they didn't want to go to if it was held virtually instead.

50%

Would reconsider attending a birthday party that they didn't want to go to if the person held them virtually instead.

41%

Would reconsider attending a work social occasion didn't want to go to if the person held them virtually instead.



Technology, has also enabled us to **build deeper relationships**, grow more connected with people around us and catch up with long-lost friends.

How the pandemic has affected our personal connections, lifestyles and relationships (continued)

Meanwhile people are also finding that the use of technology during the crisis has kept the sense of community alive and facilitated greater connections across boundaries. Around a third (32%) feel more included in society. Three in ten (29%) say they have helped an older person connect virtually since the pandemic began, while more than a quarter (27%) say they feel more connected to their local community than they did before Covid-19 arrived. The latter was particularly noticeable among younger people in Europe, with a third of those aged between 16 and 24 agreeing – as well as among all those living in Spain, the UK and Germany (32%, 31% and 30% respectively).

These greater connections with friends and family may reinforce existing trends seen within the industry for people to upgrade their technology, enabling us to maximise our virtual relationships. 29% of people we surveyed have started using devices with large screens to make video calls, the Poles being the leaders in embracing this technology. In fact, more than half (54%) of the people we surveyed told us they believed technology has had a positive impact on our society. Just 15% disagreed.

Decentralised living, has transformed our **homes** and our **lives**.

Decentralised living, then, has transformed our homes and our lives. And the survey finds we're even becoming more comfortable using technology to allow us to do things we might otherwise have avoided. Half of the people we surveyed said they would reconsider attending a birthday party that they didn't want to go to if the person held them virtually instead; the Poles and the Swedes being those most likely to do so (59% and 56% respectively).

Others would also be happy if some lockdown habits were to continue: more than four in ten would reconsider socialising with their work colleagues under the same circumstances. Indeed in some ways, technology may have enabled us perhaps to be slightly braver, and make us more comfortable with the more sensitive aspects of our relationships. 22% said technology had made it possible for them to date during the pandemic.

Technology during the crisis has kept the sense of **community** alive and facilitated **greater connections** across boundaries.



Conclusion

Beyond homes and lives: how decentralised living has changed us

Our study demonstrates the extent to which our lives and our homes are adapting – both physically and emotionally – to the changes forced on us by the pandemic.

Our homes are now both the physical and the emotional heart of our lives, the hub of our work, social and leisure activities. As a result, we take greater care of them, spend more on them, take more trouble to ensure they express our own personalities.

But we're determined also to set boundaries, to keep our working spaces separate from the parts we use for everyday living. In doing so, lockdown has demonstrated that flexibility at work is possible, indeed normal. It's made it easier for us to choose the hours that we work and freer to decide the locations we do it from. Decentralised living means 'work' is likely to continue to look and feel very different in the future.

The findings also point to a greater emphasis on the emotional impact and effect of our purchases on our own wellbeing. Our homes now say more about us than they did before. They more closely reflect our individuality.

Our habits and how we spend our free time have changed too. We're undertaking more activities, and those who have taken up new hobbies and habits have told us they want to continue doing them, even when all social distancing restrictions are over. More generally, the pandemic has changed our idea of friendship. We are comfortable connecting virtually, not just with friends but with family too. Many of us look set to rely on video connections to maintain relationships with those closest to us – particularly with those that live furthest away – once the pandemic ends.

Indeed, technology has been the great enabler during lockdown. Not only has it allowed us to carry on working, it's enabled us to effectively recreate many of our pre-lockdown social interactions.

It has made us feel more included and helped us create a sense of community in troubled times. That in turn has changed our shopping habits: the desire to continue entertaining ourselves more at home has already had a huge impact on the kinds of purchases we make. Technology products will continue to evolve rapidly to meet our changing preferences and higher expectations as consumers.

Covid-19 has wreaked havoc in our communities, caused the deaths of hundreds of thousands of people, thrown millions out of work. But across Europe we've made the changes we need to help us cope. We've strengthened our emotional connection to our home environment, learned different ways of doing things, tried out other activities, developed new skills.

Covid-19 has caused us to re-think what is truly valuable in our lives. Decentralised living allows us to make the most of these new attitudes and priorities, changing the way we interact with our friends, families and loved ones forever.

Our homes are now both the **physical** and the **emotional heart** of our lives, the hub of our work, social and leisure activities.

Methodology

Ipsos MORI interviewed a total sample of 10,883 adults aged 16-75 in the United Kingdom, France, Germany, aged 16-70 in Belgium, Netherlands and Italy, aged 16-65 in Spain and Sweden, aged 18-65 in Norway and aged 16-60 in Poland. The survey was conducted in 9 countries using an online i:omnibus methodology and a comparable online ad hoc methodology in Norway. Fieldwork has been conducted between 17th and 26th November 2020, depending on the country.

Quotas have been applied on gender, age, region and working status and data has been weighted to the known offline population proportions for those variables. Final global data has been weighted to the known offline population proportions of those countries. The country weights have been used to ensure each country is representative of its own proportion and population in comparison with actual real proportions of the countries in scope. All polls are subject to a wide range of potential sources of error.