

WHAT THE FUTURE: HOUSING

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GAME CHANGERS



Will the pandemic really change how we live?

The last 12 months have been a year unlike any other. You might even believe that it was a year that blew up all the trends. It was not.

Our inaugural issue of **What the Future** in late 2017 also focused on housing. “We’re seeing a fluidity of living,” IKEA’s Mary Lunghi said then about how homes, and even individual rooms, served as schools and offices and yoga studios.

Ipsos surveyed 18- to 34-year-olds then and now about whether they want to own or rent. We asked if people wanted to own detached homes or apartments and condos. Those numbers haven’t budged. For years, we’ve asked people what they value in a community: things like affordability, low crime rates, cultural amenities and more. Again, hardly a blip in the data.

In other words, much of what we’re seeing now is merely an acceleration of long-standing trends. One possible exception — and it’s a little early to tell for sure — is a likely temporary reversal of a decades-long decline in migration and mobility that we’ll discuss later.

“You might believe that 2020 was a year that blew up all the trends. It was not.”

The funny thing about the future is that what’s happened in the past and what’s occurring now will shape it. Today’s beliefs and actions shape tomorrow’s trends. So if you had been watching, listening, paying attention, and, yes, researching in 2017, your product lines and even your own homes would have been prepared to handle many of last year’s challenges.

Americans now are focusing on home in ways they weren’t before. Your customers are looking for their homes to be a sanctuary; our research shows they’re investing to make it so. (Not surprising. Many rarely leave their homes these days.) That’s shaping spending on home furnishings and organization, of course, but also technology, streaming services, transportation, home offices, fitness equipment and more. Their need to be prepared for more of life’s uncertainties is driving what foods are in their pantries — and what aren’t. Some are even buying new homes. How they pay for all of this, and the financing sources they turn to, could see some shifts.

This year’s Housing issue looks at the impacts of that acceleration on omnichannel sales, on the newfound love for outdoor entertainment now that we’re more properly equipped for it, on migration and the all-important stickiness of remote work.

So home is where we want to be, but I guess we’re already there.

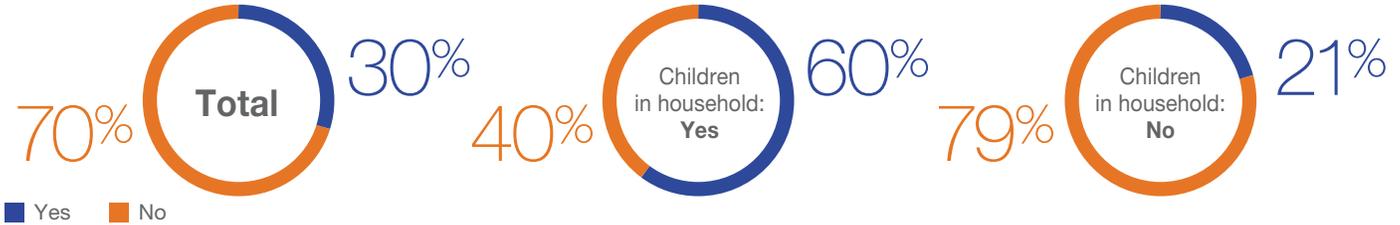
***Matt Carmichael** is editor of *What the Future* and vice president of editorial strategy at Ipsos in North America.*

The pandemic has changed **how we use our homes**

If you have kids, you're likely e-learning

Q. Please answer Yes or No to the following:

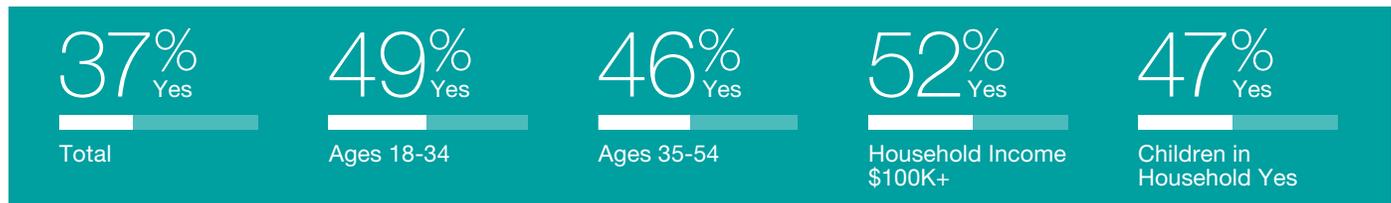
Are your children or any other household members currently e-learning or doing distance learning?



Many who can are working from home

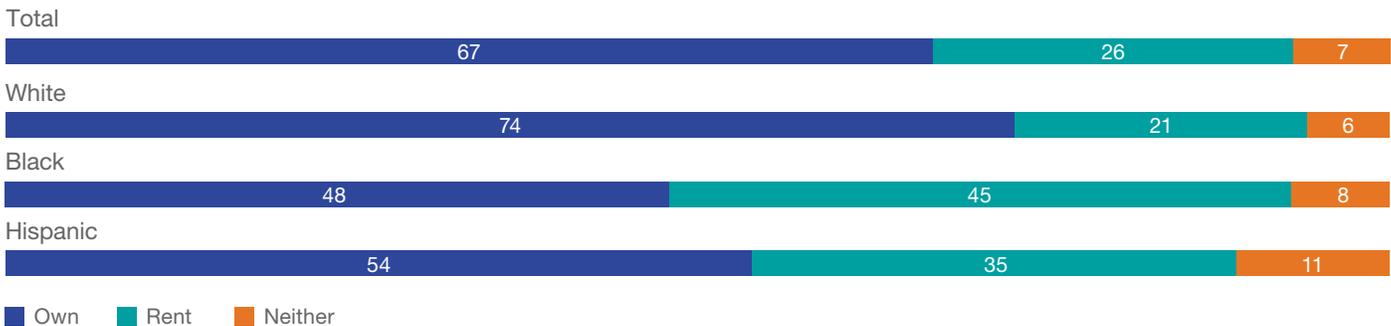
Q. Please answer Yes or No to the following:

Are you or someone in your household currently working from home, who wasn't before the pandemic?



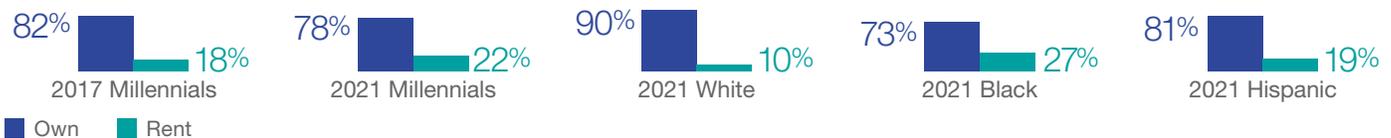
Most people still own their homes...

Q. Regarding your type of housing, do you currently...?



...which hasn't changed our American Dream of home ownership

Q. If you could choose the type of housing you lived in, would you:



(Sources: Ipsos surveys conducted Jan. 11-12, 2021, among 1,111 U.S. adults, including 311 U.S. adults ages 18-34; and Aug. 16-18, 2017, among 598 U.S. adults ages 18-34.)

The Big Question:

How will the pandemic change how and where we live?

Question:

Can our homes support our newly flexible needs?



Mary Lunghi

Country consumer and customer insights manager, IKEA

57%

of Americans ages 18-34 are decluttering and organizing in their homes more today than they were a year ago.

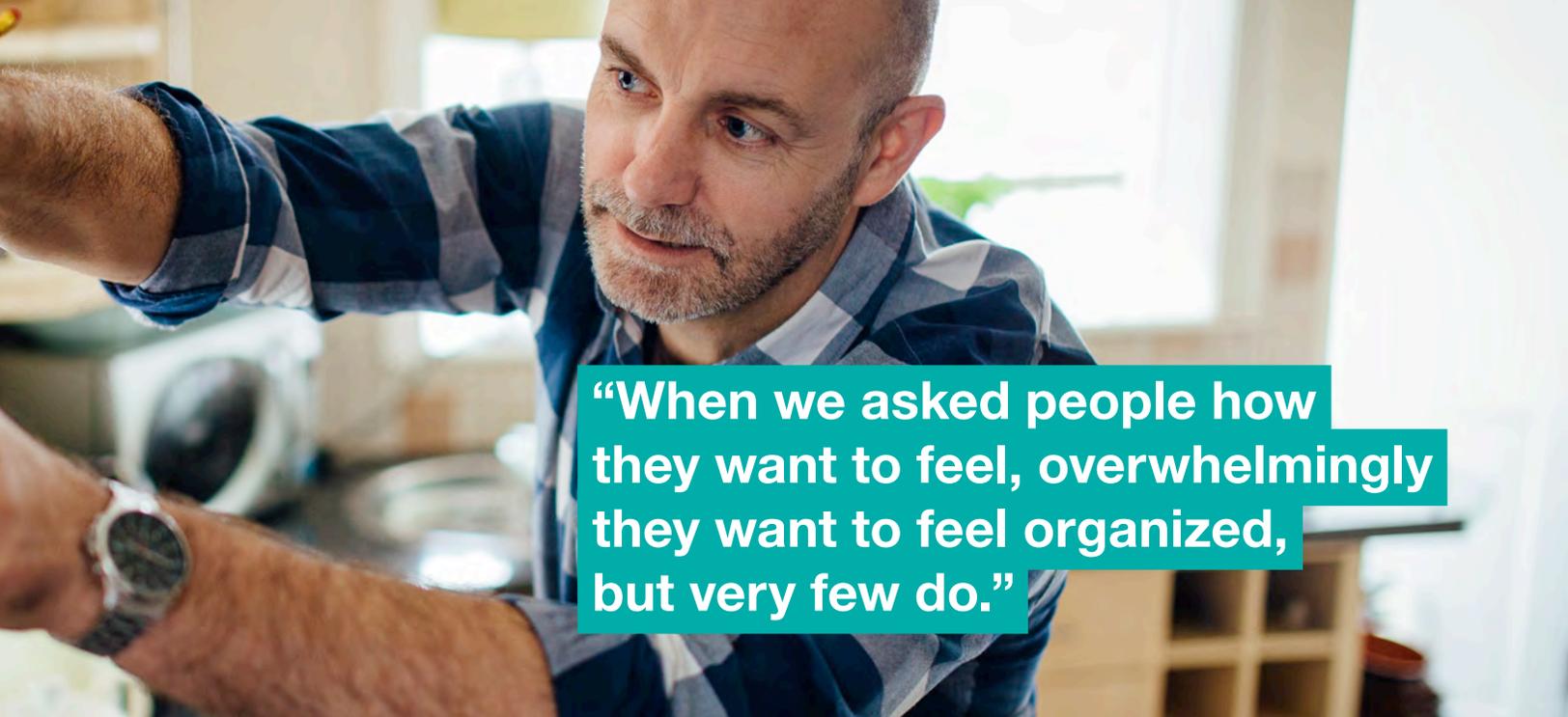
(Source: Ipsos survey conducted Jan. 11-12, 2021, among 1,111 U.S. adults.)

When we interviewed Mary Lunghi for the inaugural issue of What the Future in 2017, the discussion focused around the need for flexible space in the home.

Fast forward to the coronavirus pandemic and we're all feeling that in a major way. Now when she thinks **What the Future**, she is wondering how the fast-forward button on these trends will impact how we live, where we live.

Matt Carmichael: Our homes are currently places where we're doing many things in different ways: more cooking, more decluttering, more working. Multiuse rooms must serve many different purposes. What's going to stick?

Mary Lunghi: These were all trends pre-COVID-19, so having that flexibility in your home is really key. COVID-19 just accelerated and amplified the trends. But then, very quickly, desks became the new toilet paper. There is an expectation that remote working is going to stay, perhaps not at the numbers that it's at right now, but that it will certainly be more than it was pre-COVID-19. There's some question around gyms. What we're seeing is that people who can't get to a gym are also transforming their homes to allow for this sense of wellness, the sense of home as a sanctuary.



“When we asked people how they want to feel, overwhelmingly they want to feel organized, but very few do.”

Carmichael: That has profound implications for how we organize our homes, right?

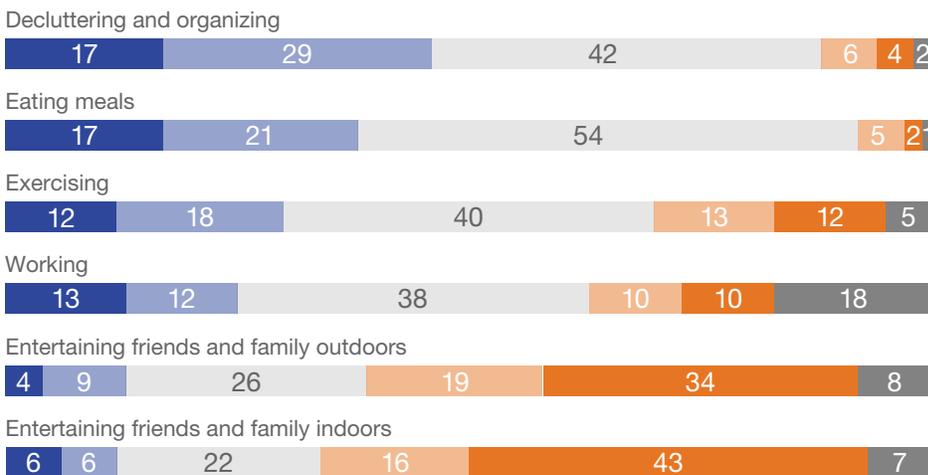
Lunghi: We’re seeing people actually taking a new look at their homes and putting it through the lens of how to adapt it to meet their current needs. They’re finding underutilized spaces. For example, when we talk about working from home and knowing that that’s going to stick, you’ve got people who are transforming closets to a workspace or that space underneath the stairs. It gives them that ability to close it off and not see it so they have a separation from their personal life and their work life.

Carmichael: In our data, one of the things people report doing more of – more so than working, cooking, etc. – is decluttering.

Lunghi: We recently did some research within Ipsos’ Online Communities, and the majority of people’s comments about their houses are positive with “comfortable,” “clean,” “safe,” “good” and “sanctuary” at the top. This is an improvement from when we ran this study at the onset of the pandemic where we saw a much greater split between positive and negative. In the interim, people have adapted and made their homes better for themselves. The negative comments are around “messy” and “unorganized.” When we asked people how they want to feel, overwhelmingly they want to feel organized, but very few do.

As we spend more time in our homes, how we use them has changed...

Q. Which of the following things are you doing more or less in your home today, compared to a year ago?



■ Much more
 ■ Somewhat more
 ■ About the same
 ■ Somewhat less
■ Much less
 ■ Don't know/Does not apply

...and we can’t handle the clutter

Q. Which of the following things are you doing more or less in your home today, compared to a year ago? (Net more)



Carmichael: There's plenty of research along the idea that having control over your home environment makes you feel a little more like you have control over the rest of your life, right?

Lunghi: Disorganization is a thing that really hangs heavy for people. Now that they're spending so much time in their home and because the home is so much more multifunctional and multipurpose, the No. 1 feeling that people desire their home to be is "comfortable." Right behind it is "organized" — ahead of "safe" and "happy." So it really does speak to people's need of organization.

Carmichael: You mention people using this time for home improvement. In our data, we see many have started or completed a project and that many are doing some projects themselves rather than hiring other people. What are you seeing as trends related to DIY?

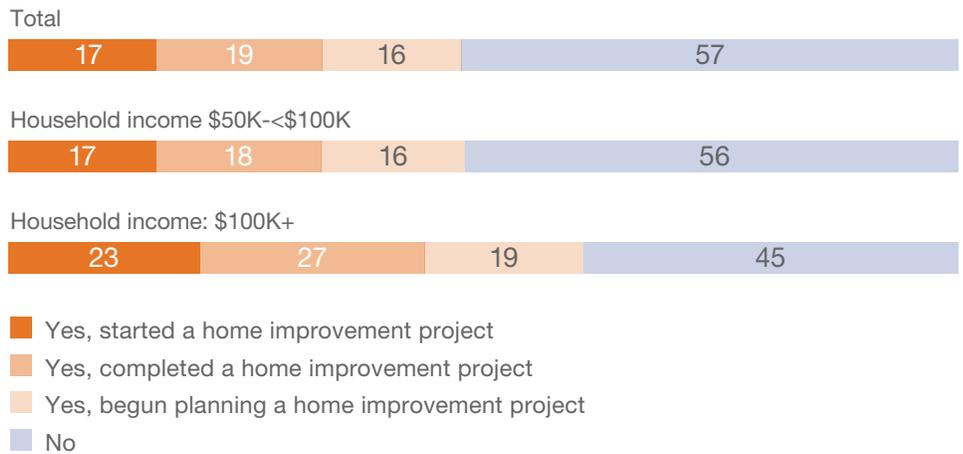
Lunghi: We're seeing a mix of things when it comes to this DIY space. Pre-COVID-19, we were seeing a growth in services and people wanting to do less DIY. There was an emphasis on time. People were living time-starved lives. COVID-19 has come along and people are home more but they're not necessarily having more time on their hands. People have the desire to have the service done, but the affordability can be a barrier.

Carmichael: Previously, one trend was about people moving or living in smaller spaces, from apartments to tiny homes. Do you think we'll see a reversal of that?

Lunghi: We are seeing out-migration from the urban centers. The thought is that they're going to suburbs, but they're also going to smaller cities that are more affordable. We are still seeing an interest in tiny homes. I think that that trend is going to continue, but maybe it will take a little bit longer to reach any kind of critical mass. Conversely, there are people who because of this pandemic definitely wanted more space — even within urban areas. If you take New York City, for example, the rents dropped dramatically, so some people that did stay in the city who were in very small spaces are now moving up to larger places.

People are improving their homes since the pandemic...

Q. Since the COVID-19 pandemic began, have you undertaken any home improvement projects?



(Source: Ipsos Coronavirus Consumer Tracker conducted Sept. 15-16, 2020, among 1,113 U.S. adults.)

...and most are doing it themselves

Q. Are you mostly hiring someone to do your home improvements or mostly doing it yourself (DIY)?



(Source: Ipsos Coronavirus Consumer Tracker conducted Sept. 15-16, 2020, among 447 U.S. adults undertaking a home improvement project.)

Carmichael: How does the retail game change? We know that IKEA had already moved toward delivery and assembly services.

Lunghi: Again, many of these trends were happening pre-COVID-19, which amplified and accelerated them. Retail was going through a major disruption. E-commerce reached a critical mass in the second quarter of 2016. Now we saw in less than a year an acceleration rate of what would have been anticipated to take two to five years. What we have learned through our research is that omnichannel is the key to success because consumers want to shop when, where and how they want. They move seamlessly between channels, so it's a seamless integration that they're looking for.

Carmichael: I can imagine that people miss the in-store experience, especially for a place that has invested so heavily in creating showcased retail locations.

Lunghi: In research we've done with Ipsos, people still do want to go to the store. In fact, when we ask people who didn't convert after visiting our website, almost a quarter cited that they want to go to the store. They either want to see it first to touch and feel it, or they just prefer to make the purchase in the store.

Matt Carmichael is editor of What the Future and vice president of editorial strategy at Ipsos in North America.



How our changing home life is changing how we buy and store pantry items

The acquisition and storage of food and household goods has been a roller-coaster ride for American families the past year. So what does this mean for the future of the pantry? What should brands do to prepare?

The first and most critical question: Which of these changed behaviors are likely to stick once the pandemic is over? We've gained several clues via ethnography and quantitative surveys, including:

- Being at home more for work and school, resulting in multi-functional use of space and increasing the amount of goods needed on hand.
- Shopping online more often (50%) to avoid store trips.
- Buying and trying different brands on the shelves when the usual product isn't available.
- Stocking up on paper products, cleaning supplies and staples, due to product shortages or reduced ability to get to the store, leading to storage of greater quantities in unusual spots.
- Cooking at home more often, sometimes for entertainment, other times out of necessity.

Ipsos layers behavioral science principles onto qualitative and quantitative learning to identify habits with staying power. For example, many people are discovering rewards to working from home — like saving time or money — that will last beyond the pandemic. So it is likely that there will be more home office days in the future, requiring more food and staples than before the pandemic.

Similarly, people are finding convenience in online delivery that is likely to factor into their future purchasing. This new trial could be a boon for brands: The brand is now available in the home, and if it satisfies the need, shoppers may add it to their future consideration set.

Buying in bulk, on the other hand, appears to be a short-term habit driven by cues that won't last. We have already seen some Ipsos ethnography panelists stop this behavior. Cooking at home is a mixed bag. The cues of boredom or necessity will go away, but some panelists found rewards like enjoyment, identity and savings will spur them to cook more often than they did before the pandemic.

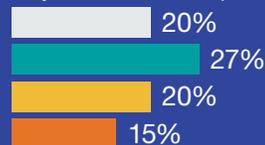
Just like the rest of us, the American pantry will not be the same post-pandemic. Brands can connect with consumers and plan now to secure their spot in the pantry of the future.

Karin O'Neill is a senior vice president in Ipsos' UU service line.

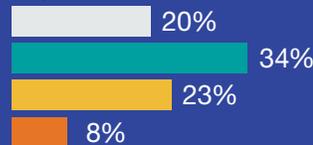
How will generations use their pantries?

Q. Once the coronavirus pandemic ends, do you think you'll do more or less of the following for food and pantry items compared to today? (Net more)

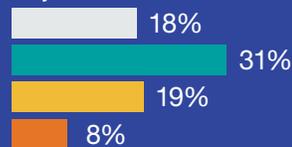
Buy items in small quantities or as needed



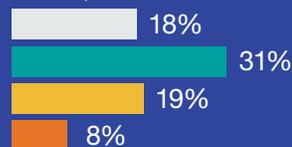
Buy canned, frozen or shelf-stable items



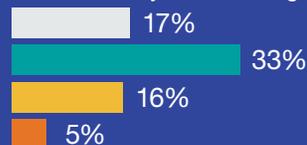
Buy items in bulk to store



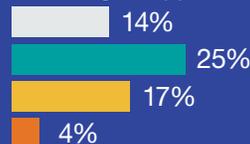
Freeze, can or vacuum seal foods to preserve longer



Use a delivery service for groceries or household goods



Use a digital app to manage/alert for low or expiring supplies



■ Total ■ Ages 18-34 ■ Ages 35-54 ■ Ages 55+

(Source: Ipsos survey conducted Jan. 11-12, 2021, among 1,111 U.S. adults.)

Question:

Will the pandemic permanently shift where we live?



William Frey

**Senior fellow,
the Brookings Institution**

Bill Frey of the Brookings Institution is arguably the leading demographer in the U.S.

Since population and demographic trends are often glacial, when he thinks **What the Future**, he's thinking about the past. Because after the pandemic, the trends that we had been seeing will likely be the trends we start seeing again.

Matt Carmichael: Where was the U.S. population living pre-COVID-19 in terms of urban, rural and suburban geography, et cetera?

Bill Frey: For the first part of the 2000s, we had an unusually high level of growth for cities. Some of that had to do with the Great Recession and young people who had put off getting jobs, buying homes, getting married and all of that stuff. They often wound up in cities. There were a couple of unusual years where the hundred largest metropolitan areas or cities were growing faster than the

suburbs. It was probably the first time since they invented the car, and there were all these stories about cities “coming back.” But as the economy picked up again, that changed. As the economy picked up in the 2010s, there was more suburbanization, there was more movement to the Sunbelt or the middle parts of the country.

Carmichael: Has the pandemic accelerated that change?

Frey: I must get a call a week about, “Is New York ever going to come back?” To the extent there have been those moves, I think a lot of them have been temporary. Then there's also the kind of discussion about if people will ever go back to work in the office. It's too soon to tell. I think in another year or two, when the vaccine comes out and people adjust, we'll probably go back to similar migration patterns and population shifts. It may be that young people then will go back to cities and stay there for a while until things get better for them economically.

49%

of adults ages 18-34 have moved or have considered moving since March 2020 due to COVID-19 and other events.

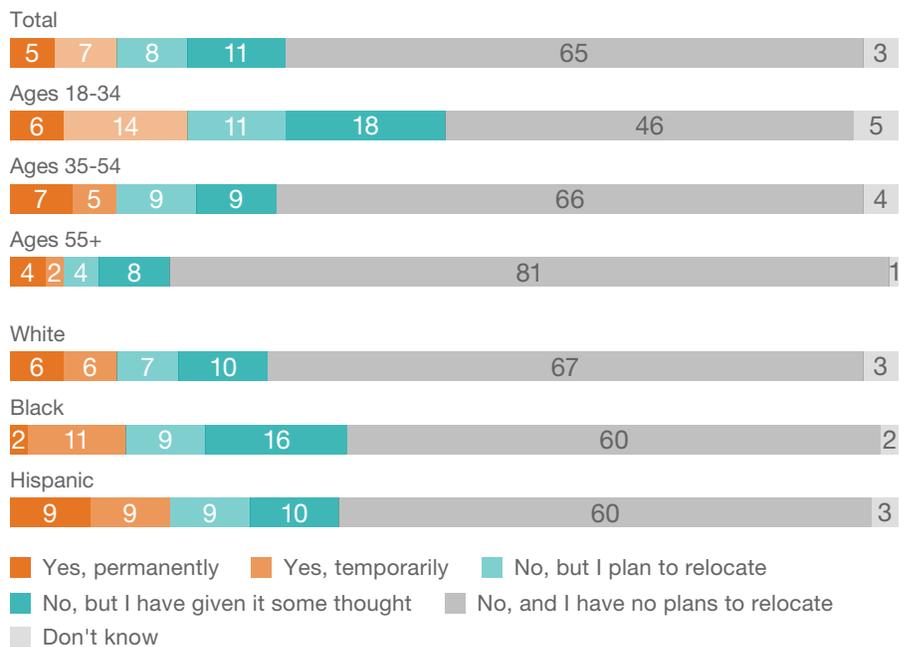
(Source: Ipsos Coronavirus Consumer Tracker conducted Nov. 10-12, 2020, among 1,113 U.S. adults.)



The pandemic has driven many to move or consider a move...

Q. Since March, have you relocated, or considered relocating because of the coronavirus pandemic and other events in recent months?

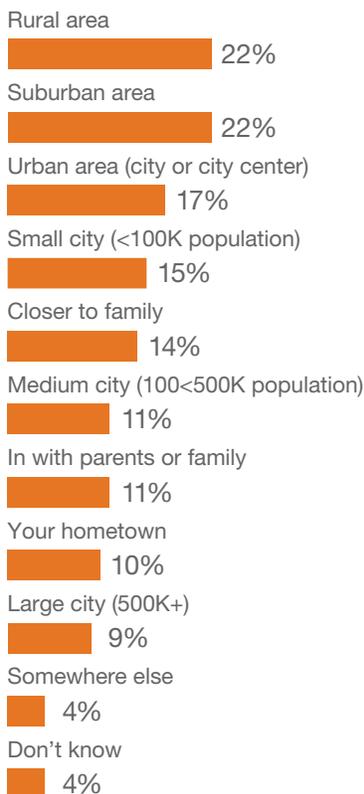
18% of high income (\$125k+) adults have moved



(Source: Ipsos Coronavirus Consumer Tracker conducted Nov. 10-12, 2020, among 1,113 U.S. adults.)

...and the most popular destinations are away from the city

Q. To where have you moved or thought of moving?



(Source: Ipsos Coronavirus Consumer Tracker conducted Nov. 10-12, 2020, among 327 U.S. adults who have moved or considered moving.)

Carmichael: In terms of migration, before the pandemic started, we had hit historical lows. Why?

Frey: It's a long-term pattern. In the postwar period, almost a fifth of the population moved every year. Most were local moves within counties. They were based on housing and family considerations. People move longer distances to get jobs. In the 1950s and '60s, you had a much younger population; younger people move more than older people. There were usually a lot more renters and homeowners, and renters tend to move more than homeowners. Long-distance mobility decreased since the Great Recession due to the drying up of jobs. Economists say that there's been more homogeneity among job markets over time, but I chalk it up at least recently to younger people still putting off major life decisions, even as the economy improved.

“I think in another year or two, when the vaccine comes out and people adjust, we’ll probably go back to similar migration patterns and population shifts.”

Carmichael: The lack of mobility seems counterintuitive. As you said, the job market is becoming more homogenous in terms of jobs being less clustered. Remote work is a greater part of the workforce. You would think that people could move more and make those choices based on the livability or the affordability of a city. But I guess we haven’t really seen that in the data.

Frey: Again, it’s the difference between long-distance and short-distance moves and the fact that you have more families that have more workers in them. That means that all of them would have to get new jobs. If you moved somewhere else back in the 1950s, it usually was only a male breadwinner.

Carmichael: In terms of the Millennials and the iGen coming in behind them, how much do you think their differences are generational and how much of that was life stage?

Frey: I think they’ve been under unusual circumstances. The first Millennial turned age 27 in the year 2007 at the beginning of the recession. The U.S. didn’t really start to straighten out economically for maybe another eight or nine years. It put them behind the eight ball. The iGen now have to cope with another set of issues. Every 10 years, whatever young generation is coming through at that time keeps getting hit by these different, bad, but equally catastrophic circumstances.

Carmichael: What will you look for in the data as it comes out the next year, two years, five years?

What people value in a place to live is primal and unwavering

Q. When thinking of a place you would be willing to move to; how would you rate the following in terms of their importance in making that place a great place to live? (Mean)

	2021	Change from 2015
Overall cost of living	8.4	-0.2
Access to affordable healthcare	7.8	0
Available jobs	7	-0.2
Proximity to people in similar life stages (retirees, young families, etc.)	6.5	0
Quality public schools	6.1	0.1
Crime rate	8.3	-0.1
Climate	7.6	-0.2
Amenities like cultural institutions, parks, farmers markets	7	-0.1
How engaged residents are in their community	6.4	0.1
Access to higher education options	5.8	0.1
Ability to afford housing that meets your/your family's needs	8.3	-0.3
Relative risk of natural disasters (fire, earthquakes, flooding, tornadoes)	7.4	NA
Daily commute times	6.5	-0.2
Racial and ethnic diversity	6.3	0.6
Public transportation	5.4	-0.1

(Sources: Ipsos surveys conducted Jan. 11-12, 2021, among 1,111 U.S. adults, and April 2015 among 1,142 U.S. adults.)

Frey: I’ll be looking at the population estimates at the county and metropolitan levels. Is there an accentuated movement away from some of these cities that have been suggested by these sorts of other data sources, like real estate people and moving companies and so forth? The other aspect of this is immigration. A lot of places such as big metropolitan areas like New York or Los Angeles aren’t growing as much anymore because we’ve had immigration restrictions and then the pandemic on top of that.

Carmichael: Do you think we’ll go back to the baseline trends we’ve been seeing, or do you think there’s potential for some lasting change?

Frey: I tend to be on the side that we’re going to go back to more where we’ve been before. There could be considerably more people working from home than we’ve known in the past, so that might change some migration patterns over time. I’m not of the school that big cities are going to be wanting for populations. Big cities that have been attractive before will come to be attractive again. It’s hard to know what’s going to go on in rural areas. People have been leaving the rural areas pretty much for the last two decades. Big parts of the Great Plains are not going to do any better in the future than they’ve done in the past.

Matt Carmichael is editor of What the Future and vice president of editorial strategy at Ipsos in North America.

Why home financing needs innovation beyond the pricing game



All things financial are getting faster, digital and almost invisible. The friction between shopping for things and paying for them has virtually disappeared.

One significant exception is home buying, the biggest purchase and financial obligation that most Americans will ever make. Every aspect of the process is confusing and stressful — which leaves it open for disruption from within and even outside the financial services industry.

Given the size and infrequency of a home-buying transaction, consumer choice is dominated by the pursuit of the lowest mortgage rate. Additionally, a broker or lender might close more mortgages in a day than a customer does in a lifetime. Given this disproportion in experience, customers are immediately put at a disadvantage due to the lack of communication and updates during an often-emotional process.

Eliminating the anxiety that comes with home purchases will go a long way in winning customer loyalty. And there are models in adjacent industries that show the way.

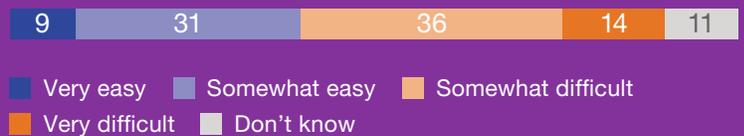
A growing variety of players offer end-arounds on the traditional mortgage. They include lease-to-own fintech startups like Divvy and ZeroDown, and down payment crowdsourcing fintechs like HomeFundIt. While promising, these companies aren't immune to the pitfalls of the COVID-19 economy.

Companies outside of traditional financial services are currently disrupting banking as they put together the pieces for consumer credit and payments. It's possible that these innovators may expand their focus into home finance in the near future. The combination of a customer-obsessed mission and a potentially better risk model leveraging the customer data they own could be the disruption that finally eases the anxiety for consumers in the home-buying process. The question: Who will get there first?

Kevin Hung is a vice president and client officer at Ipsos.

For half, buying a home is difficult...

Q. How easy or difficult do you think the home buying process is today?



(Source: Ipsos survey conducted Jan. 11-12, 2021, among 1,111 U.S. adults.)

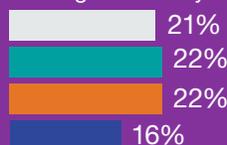
...which creates opportunities for disruption and innovation

Please rank in order of importance what would make the home buying process easier with 1 being most important (Ranked 1)

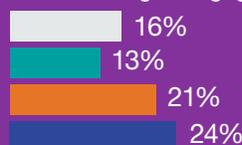
Finding an affordable home that meets your needs



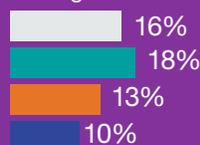
Raising the money for a down payment



The financing/mortgage process



Having to find a buyer for an existing home



Legend: Total (light blue), White (teal), Black (orange), Hispanic (dark blue)

(Source: Ipsos survey conducted Jan. 11-12, 2021, among 1,031 U.S. adults who do not find the home-buying process to be very easy.)

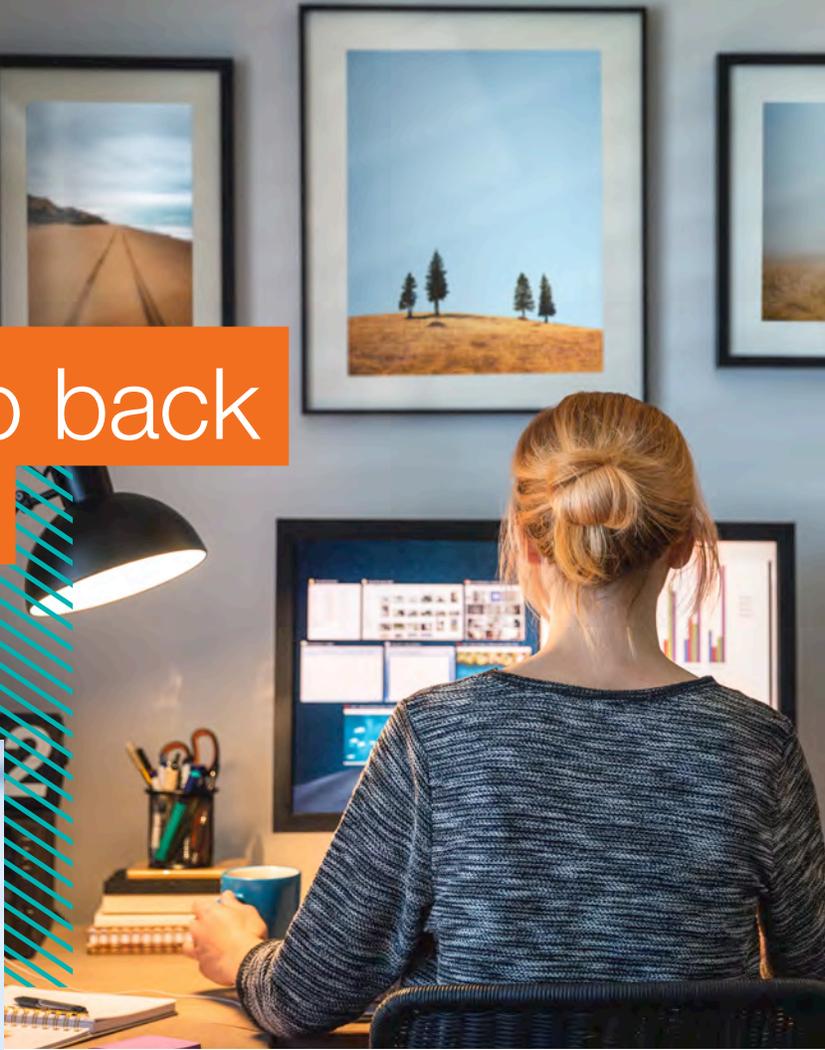
Question:

Will we ever go back to our offices?



Jed Kolko

**Chief economist,
Indeed**



Before he joined the job-listing site **Indeed** as chief economist, **Jed Kolko** held a similar role at online real estate marketplace **Trulia**.

That puts him in a unique position to understand the relationship between the labor market and housing market. When he thinks **What the Future**, he's looking at how remote work might be the stickiest of our new pandemic habits.

78%

of Americans want a detached home.

(Source: Ipsos survey conducted Jan. 11-12, 2021, among 1,111 U.S. adults.)



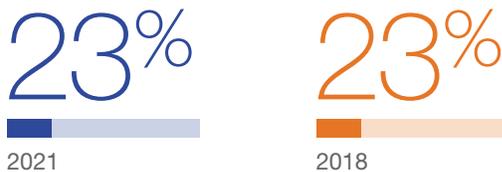
Despite more time at home, our attitudes about renovating vs. moving have not changed

Q. If your home needed an upgrade (such as new floor, kitchen, or extra bedroom) and you had a set amount of money to spend, would you prefer to use this money to:

Renovate your home so it meets your needs



Put a down payment on a new home or rent a new home



(Sources: Ipsos surveys conducted Jan. 11-12, 2021, among 1,111 U.S. adults, and Sept 4-18, 2018, among 10,142 adults in 20 metro areas on behalf of Zillow.)

Matt Carmichael: In the early days of the pandemic, there were breathless trend pieces about the death of major cities. Our data shows that might be overblown, but what is yours showing?

Jed Kolko: The really solid migration data tends to come out with a lag. We actually won't know definitively whether there are shifts in where people live for some time. Short-term evidence comes from housing pricing and rent data. Expensive places might become a little bit more affordable. Rather than seeing a massive dip in the population of big cities, we may see a shift in the competition.

Carmichael: Do you think full-time remote work will stick after the pandemic? What are you seeing from employers?

Kolko: I think probably for some companies for at least some roles. But even being able to work from home almost all the time, say 90% of the time, is still very

different from being able to work remotely all the time. The 90% home worker who is still going to the office once a week needs to be within a long-commuting distance of their office. It may mean moving a little bit farther out to a more affordable suburb with a longer commute and cheaper real estate. But that's not the same thing as being able to move anywhere. Even on the same team, people may end up having very different patterns in how much they work from home and come into the office.

Carmichael: We need our houses to do more, whether that means we move to larger spaces or reconfigure the spaces we're in.

Kolko: Yeah, one of the sectors that has done pretty well in this pandemic has been construction and retail connected to home improvement. A lot of the attention has been around anecdotes of people moving to different places,

maybe temporarily, maybe permanently. But people are making investments in their homes, from getting a more comfortable desk or ergonomic chair, to buying exercise equipment, to bigger home improvements to make it more possible to work from home. And the changes aren't just related to working from home.

Carmichael: That's certainly a premise of this issue, that how we live impacts how we spend — and that those patterns are changing in these times.

Kolko: People have been forced into new habits; eating at home more and cooking instead of eating out as much, exercising at home more rather than going to the gym. It's those changes that will be less widespread and permanent. There will almost certainly be more remote work after the pandemic than before. It's less clear whether there'll be a permanent shift toward cooking more at home, exercising at home and insourcing more of your entertainment.

Carmichael: What does this all bode for younger workers, especially?

Kolko: Remote work may be less appealing for younger workers than for older workers. The advantages of in-person offices may be greater for people who are starting out in their careers, still getting to know the organizations and building their professional networks.

Carmichael: If younger workers are in more urban areas to some degree and renting more to some degree, their housing needs become a little bit different too, right?

Kolko: This may be an example of a trend that was already underway. A big demographic shift in cities during the 2010s has been the shift toward younger urban populations. That's more because other people were less likely to live in cities rather than an increase in young people in cities. But it gives an overall shift in the composition toward younger urban residents.

Carmichael: Are you seeing in job listings on Indeed that employers are shifting toward remote being allowable?

Kolko: We're still very much in the middle of the pandemic. Some of that may still be temporary rather than permanent. The Bureau of Labor Statistics is now asking people every month whether they're working from home and the share has fallen since May [2020] when they started asking. So some of the increasing remote work mentioned in job postings may be temporary.

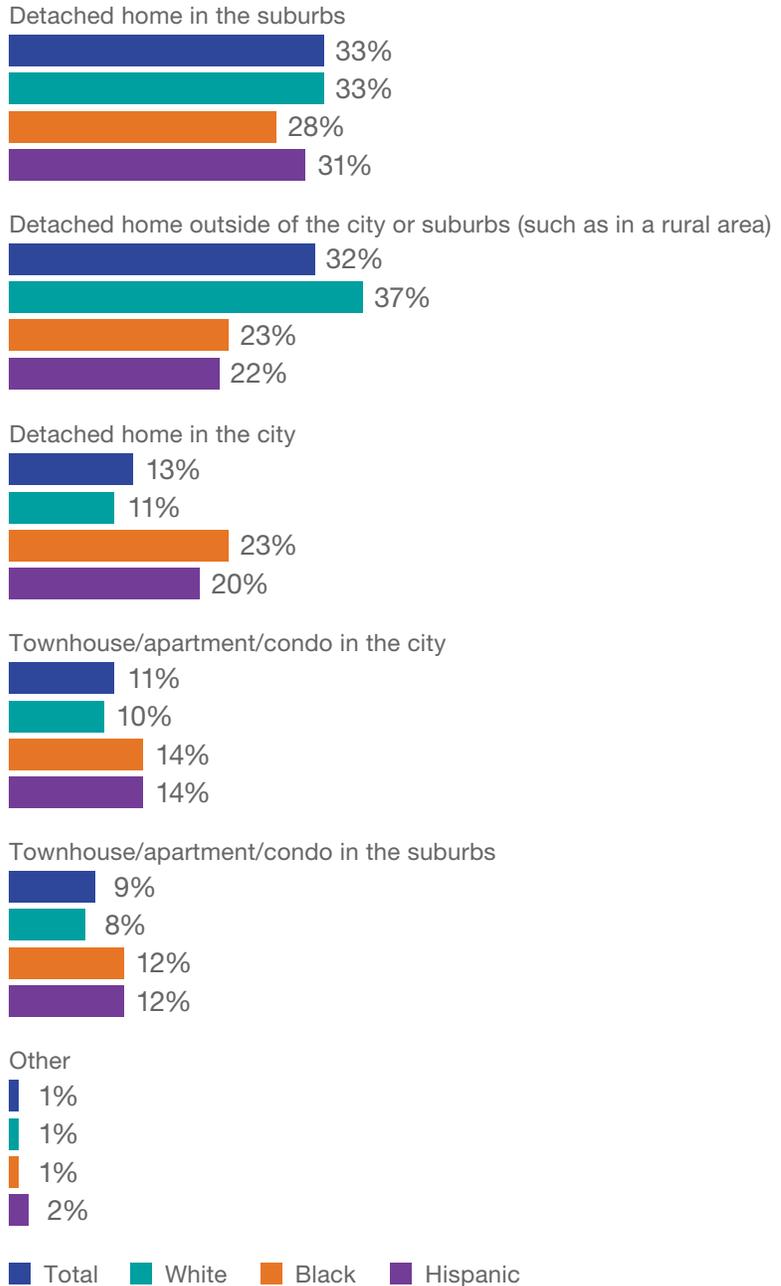
Carmichael: What is your hunch for how this all plays out in the next three years or so?

Kolko: My hunch is that more people will be working remotely than before the pandemic. That will lead to somewhat of a shift in housing prices and rents as some of the most expensive neighborhoods may become somewhat more affordable. That will attract new people to big cities who want to be in big cities for reasons other than being close to the office. The biggest questions to me are not only about remote work, but also about how spending patterns change and whether we see a sustained swing away from meeting at restaurants, going to movies and live performances, to cooking at home and watching entertainment on screens instead, or whether the demand for some of those amenities that are a huge part of the pleasure of being in cities bounces back.

Matt Carmichael is editor of What the Future and vice president of editorial strategy at Ipsos in North America.

People still want the American Dream

Q. Of the following options, which one is your most preferred living situation?



(Source: Ipsos surveys conducted Jan. 11-12, 2021, among 1,111 U.S. adults.)

“It’s less clear whether there’ll be a permanent shift toward cooking more at home, exercising at home and insourcing more of your entertainment.”

Has the commute finally changed?

In a November survey, half of full-time workers in America reported working from home more often due to the pandemic, plus an additional 21% who said their habits hadn't changed. Only 6% said they were working remotely less often.

An increase in remote work is one of the pandemic shifts likely to stick, for those who are able to. Is commuting a thing of the past?

In the Ipsos Coronavirus Consumer tracker, we've asked about driving and commutes several times since the lockdowns began. In a survey from November, nearly 30% of adults said they were driving less than they were before the pandemic began, compared to 18% who said they were driving more. But we assume we'll get back in our cars. We might even miss them. Working professionals anticipate their overall driving will increase (33%) or stay the same (54%) once a vaccine is widely available, compared to times before the pandemic.

We don't, however, miss commuting.

Before the pandemic, about three in four working adults commuted to work by car alone. One in 20 took public transportation — a figure that is much higher in cities with robust transit systems like New York and Chicago. For urban residents, commute times of 40 minutes to an hour a day are typical.

Ipsos asked working adults specifically about commuting in surveys fielded in July and August. One in three (33%-37%) employed adults thought their commutes would change when they could return to work. By December, however, that number had dropped to 26%, perhaps as some workers started returning or settled into new routines of working at home.

So how would those commutes change? Interestingly, nearly half (45%) of those who expect their commute to change anticipate driving more often. Since most people were driving to work to start with, we suspect that increase is partially due to public transportation users who feel that cars will be a safer bet.

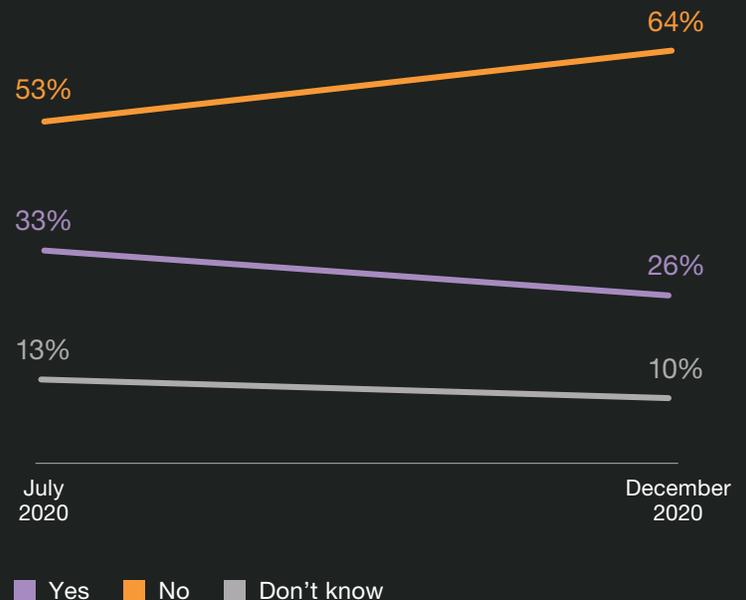
A quarter of people who said their commute will change anticipate less commuting due to continued working from home. The economics of driving once every week or two versus driving every day are very different.

Has technology, such as wide use of broadband internet and video conferencing, finally enabled us to be more efficient and enable us to work less as they promised decades ago? Time will tell, but my bet is finally a big yes.

John Kiser is a senior vice president in Ipsos' U.S. Automotive & Mobility service line.

As the pandemic wore on, people were less likely to think their commutes will ultimately change...

Q. When all the coronavirus-related stay at home orders end, do you expect your work commute to change?



(Source: Ipsos Coronavirus Consumer Tracker, conducted Jul. 21-22, 2020, and Dec. 9-10, 2020, among 600 and 605 employed U.S. adults, respectively.)

45%

of those who expect their commutes to change expect to drive more.

(Source: Ipsos Coronavirus Consumer Tracker, conducted Dec. 9-10, 2020, among 149 employed U.S. adults who expect their commutes to change.)

Question:

Has the pandemic expanded our definition of home?



Cristy Hatter

VP of brand, Solo Stove

The hearth, that gathering spot of coziness and community, is increasingly moving outside since the coronavirus outbreak. As a result, cylindrical, steel fire pits marketed by Solo Stove have become ubiquitous in neighborhoods and on social media.

Cristy Hatter, VP of brand at Solo Stove, says sales growth more than tripled since the outbreak. When she thinks **What the Future**, she believes home life will incorporate more of the great wide open.

22%

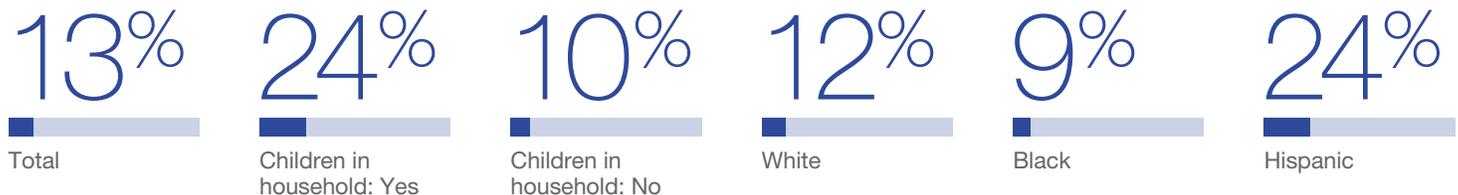
of adults ages 18-34 are entertaining friends and family outdoors more today than they were a year ago.

(Source: Ipsos survey conducted Jan. 11-12, 2021, among 1,111 U.S. adults.)



Who is entertaining outdoors more?

Q. Which of the following things are you doing more or less in your home today, compared to a year ago? – Entertaining friends and family outdoors. (Net more)



(Source: Ipsos survey conducted Jan. 11-12, 2021, among 1,111 U.S. adults.)

Kate MacArthur: How has the pandemic changed the way people think about outdoor living?

Cristy Hatter: The pandemic has definitely changed outdoor living. I think it's changed home. It's changed what home means. You tend to look at your home as a place to get away from. There are messes to clean up there and things to do and chores there. Now, home has become — yeah, there's messes and chores there — but this is also my sanctuary. This is my safe place. This is how I can keep my life going.

MacArthur: What about beyond the backyard?

Hatter: We saw lots of people planning socially distant community activities to be able to meet with the neighbors. They all bring a few fire pits around and then everybody is able to keep a safe distance and enjoy a warm fire and a moment together. I definitely think the mindset has shifted from this home base being something of a refueling station to a place of refuge.

MacArthur: How does that change our appreciation for the outdoors and nature?

Hatter: A lot of people have looked at and still look at the outdoors as a getaway, a place to reset and recharge. So, trying to find a way to reset those batteries and

to keep appreciating the people in our lives, we look for opportunities for art and inspiration. And what better place to find that than out in nature?

We've recently done a series on hidden getaways that people throughout the pandemic have discovered nearby that are just beautiful displays of nature that they weren't expecting to find, but did because they were like, "I gotta get out of here." Even things that are very near to you and quite local that you may not have taken a second look at. When you're really desperate, you find things. And being out in nature and having that moment of appreciation and awe refuels a lot of people and keeps people going.

MacArthur: There's a duality with home as both your sanctuary and your prison.

Hatter: Yeah, depending on the person, right? Those more social types who look to things naturally for connection are seeing this opportunity in the home as being a time where they've seen improved relationships with their kids and improved connections there. Whereas other people who find their energy from that moment of solitude are the ones that are more looking "out." They're looking to get that walk in the woods and to see those stars and looking for that experience "out."

MacArthur: Where do you think this will take people in how they design around their home to merge inside and outside?

Hatter: In the backyard, we've seen people with more time at home and some amazing backyard renovations. What we found is that the Solo Stove becomes this point of gathering and focus. The whole yard is then redesigned around this experience. That's bringing people together often every night. We've had architects reach out to us saying, "We want to incorporate your product drawings in our renderings for our clients." I think that what you're seeing is a trend. In my experience, the more you invest in that space, the more it becomes a treasure for you and a great place to be.

MacArthur: How big of a difference will this have on people making permanent design changes to accommodate this outdoor life?

Hatter: Whether it's outdoor cooking spaces or outdoor living spaces, from enclosures to a full outdoor renovation, I've definitely seen evidence of that over the last year, in both user-generated photos that we've seen and people being interested to know what's the right thing for the backyard space. Projectors, TVs, pizza ovens, grills, those kinds of things being some of the focal points, as well as construction-type activities in the yard.

“Now, home has become, — yeah, there’s messes and chores there — but this is also my sanctuary. This is my safe place.”

MacArthur: What do you see happening as we move from an indoor culture to this outdoor one?

Hatter: What we see as a resonating theme is this desire for connection. This desire to have great moments to create good things in life. With technology and the video game explosion and social media, we were exploring those avenues. But I think to some degree technology drove us to more of a place of solitude, and the pandemic exacerbated that. [It drove] people who were feeling alone before the pandemic and even more so during the pandemic to that place of desperation that we all tend to get to when there’s something not OK inside. We’ve got to get to that point of desperation to be willing to change it. And I think the pandemic did that for a lot of people, to their benefit.

MacArthur: You mentioned technology. How might we see people using smart home technology to control our environment outside?

Hatter: I absolutely think that will follow. I think that the more that people are outside, the more technology will be brought into that space and only to its advantage.

Kate MacArthur is deputy editor of What the Future and a senior writer at Ipsos in North America.

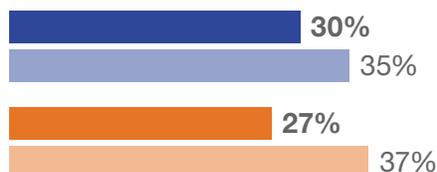
Smart home tech isn’t just for Millennials anymore

Q. Which, if any, of the below would make your life at home easier?

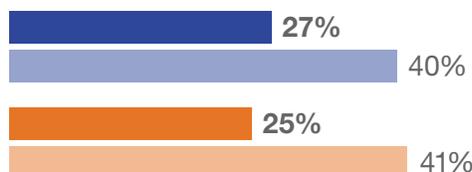
Energy-saving solutions (e.g. motion-sensing lights, LED light bulbs, etc.)



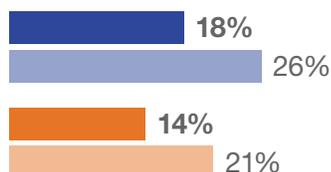
Home security solutions (e.g. remote/smart alerts, door locking, cameras, etc.)



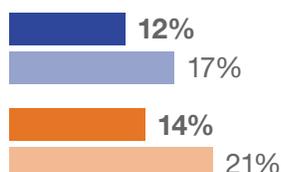
Smart home appliances (e.g. Wi-Fi controlled, smart refrigerators, integrated TVs, garage doors etc.)



Digital assistant/smart home hubs (e.g. Amazon Echo, Google Home, Alexa, Apple TV/Siri, etc.)



Integrated home audio/theater system



■ 2021 ■ 2021 Ages 18-34
■ 2017 ■ 2017 Ages 18-34

(Source: Ipsos surveys conducted Jan. 11-12, 2021, among 1,111 U.S. adults who selected a response, and Aug. 16-18, 2017, among 2,031 adults.)

How brands can help people make the most of their home sanctuary



COVID-19 has amplified the role of the home as a sanctuary. We are spending exponentially more time at home seeking comfort, security and emotional well-being. It's likely that these trends will continue, and brands need to be ready to support this shift.

Americans feel a range of emotions from hope to anxiety, and Millennials feel the most anxious, according to the ongoing Ipsos Coronavirus Consumer Tracker. More than eight in ten U.S. respondents in Ipsos Global Essentials tracker agree that things are “out of control.” COVID-19, the economy, and episodes of social unrest largely drive these negative feelings.

As a result, we are remodeling, reorganizing, repurposing and rediscovering our indoor and outdoor spaces as home takes on even bigger meaning. We expect our homes to provide comfort, security and community, along with supporting our health and well-being. What we observed from pandemic buying behavior is that these desired outcomes can be accomplished via a simple refresh of décor or by planning more substantial home upgrades.

The implications of these shifts in our homes are broad and require retailers to prepare across departments and customer touchpoints:

Project planning: Brands need to be ready to support one or more aspects of space planning, designing, constructing and financing. This includes online support tools, tutorials and educational materials.

Project focus: Shoppers appreciate project inspiration tools, including in-store displays, knowledgeable sales associate consultation, AR/VR visualization tools, Pinterest/Instagram picture boards and shoppable social media platforms.

Customer service: Retailers need to consider their customer-service readiness for in-store, online and BOPIS, including inventory. For example, during the summer 2020 months, the increase in gardening led to seeds being out of stock, and socially distanced outdoor entertaining led to propane tank shortages.

Project hiring: Ipsos research shows that homeowners expect to do the majority of projects themselves, followed by a combination of DIY and contractors. Brands need to consider how they can support both work styles to position themselves to meet consumers where they are in their skill and confidence levels.

With the renewed focus on home and yard, people are looking for ways to maximize the functionality and enjoyment of these spaces. Retailers and brands that create inspirational content, ready-to-assemble kits and project packages increase the likelihood of engaging the home improvement shopper. By making shoppers feel taken care of, hopeful, valued and good about their overall buying experience, they will be more loyal return customers.

Kristy Click is a senior vice president and senior client officer at Ipsos.

How are people coping?

Q. From the list below, what are the top three phrases that best describe how you are feeling today? (% Top 6 selected)



(Source: Ipsos Coronavirus Consumer Tracker survey conducted Nov. 24-25, 2020, among 1,114 U.S. adults.)

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GAME CHANGERS

