

FOUR WALLS ONE ROOF

The traditional concept of home has long been associated with a box. A physical structure with four walls, some windows, a front door...and everything in between. A fixed, static space, that we can reach out and touch. A single detached dwelling that we can call home.



HOME IS

CHANGING

ECONOMY

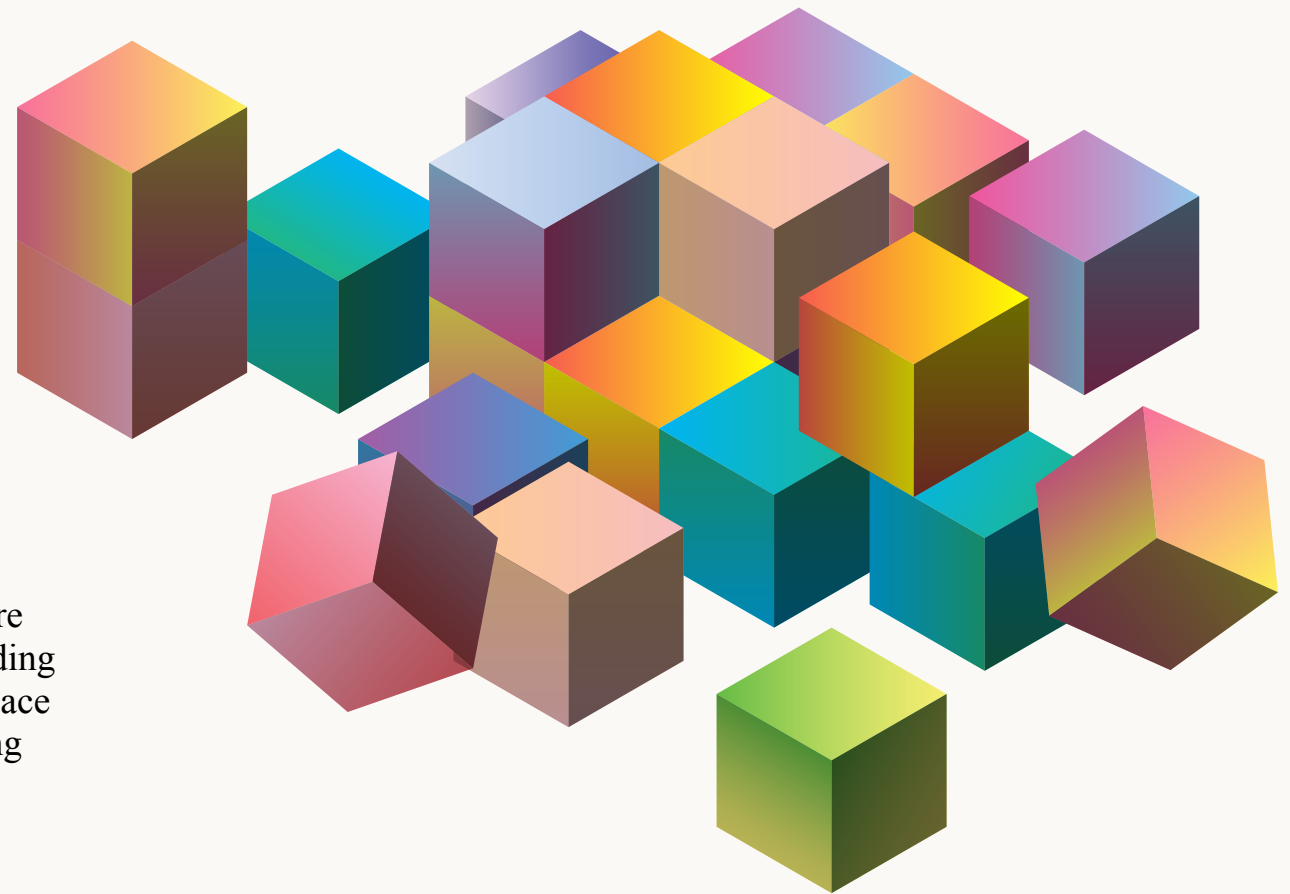
Homeownership rates for Millennials in North America and Europe have been falling for the last decade - a problematic byproduct of lower income and underemployment, combined with a rise in property value. The result: Millennials are half as likely to own a home at 30 as Boomers were at the same age.

LIVING ARRANGEMENTS

We are living in a post-nuclear world - the nuclear family is on the decline. In 1970, more than 40% of US households were nuclear families; today, that figure doesn't even reach 20%. A variety of factors mean we are changing how we live... and with whom.

URBANIZATION

World populations are becoming increasingly urbanized - more and more people are packing their bags and heading to cities to set up home. As a result, space is at a higher premium, and we're being forced to react and respond.



SO WE HONED IN ON WHAT IT MEANS TO 'FEEL AT HOME' TODAY

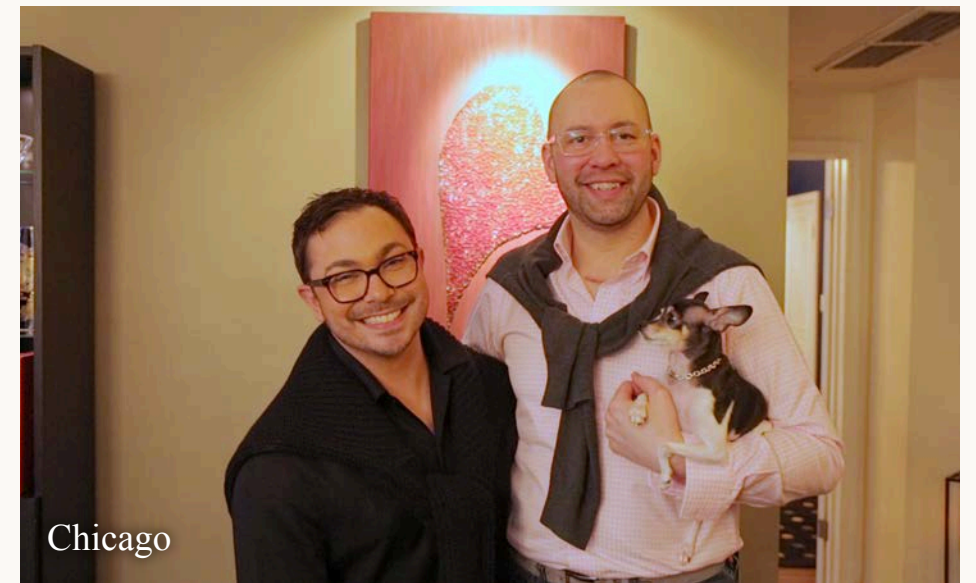
EXPLORING DIFFERENT DIMENSIONS OF HOME IN THE 21ST CENTURY

Here at The Sound, we're firm believers in placing humans at the center of our stories. We decided to invite the human story back into the home, by exploring the **feeling** of home... to genuinely understand people's needs, desires and struggles when it comes to their homes today.



60 PEOPLE DIVERSE HOUSEHOLDS 8 DIFFERENT MARKETS

We've been on a captivating journey across the globe, exploring every corner of people's homes, talking intimately about life at home and listening to truly inspiring human stories.





**OUR DISCOVERY:
A LOT HAS CHANGED**

**BUT THE
FEELING
OF HOME
REMAINS
THE
SAME...**



HOME IS A FEELING WHICH IS CREATED WHEN OUR **CORE** **NEEDS** ARE BEING MET

At a basic physiological level, home is a place for shelter. But home is so much more than that. Home is a union of human needs.

Home is not a thing or a finished product.
Home is a *feeling*.

No matter who you are or where you're from, we all have core needs for what makes a house a **home**.

"[Home] is really about the emotion. It's not about the physical building walls at all. I think that is the part that can change, but everything that you carry with you, the emotions, the things that make it you, stay the same."

Payal, India



STABILITY | BELONGING | COMFORT | CREATIVITY

STABILITY

THE NEED TO FEEL SAFE AND SECURE



Stability can come in many forms – from having a roof over our heads, to knowing where we stand in the world, to feeling emotionally safe in moving through the world.

For many, **feeling** at home is linked to a safe haven. A physical house which shelters us from dangers of the outside world. A place where we feel safe and secure with others.



“Coming home I feel relief, knowing that I’m entering a really peaceful and safe space...most of the time. I feel really good because I can lock my door, which gives me a sense of calm, like okay, I feel safe and then I can relax and sleep and let go.”

Wanjeri, Nairobi

BELONGING

THE NEED TO FEEL LOVED AND FORM BONDS WITH OTHERS



Belonging is about being connected to the people and places we most identify with. Often belonging is expressed in our sense of **where** 'home' is to us. It can be tied to a specific place; where we come from and where we are often inspired to return to. But belonging can also be housed in a person, or group of people, or a community.



"Home is where your friends are, where you can behave naturally and where you feel loved. It is welcoming, almost saying 'you are ok' in the world. It is a place to re-align one's self after a hard day."

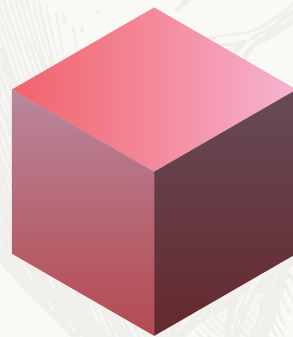
Holger, Germany

COMFORT

THE NEED TO CREATE A HOME WE FEEL AT EASE IN



Being comfortable at home can come in many forms - from breathing a sigh of relief as soon as you step through the door, to kicking your shoes off and sinking into the couch, or simply knowing you are coming home to a familiar place. It's that sense of ease and contentment when you know you're home.



"Coming home, I think I feel relieved in a way; it's like leaving the outside world behind and then coming in. The first thing I always notice as soon as I open the door is that the floor is warm and when I take my shoes off at the door I'm like 'Oh that's lovely!'"

Catherine, UK

CREATIVITY

THE NEED TO EXPRESS WHO WE ARE



Creativity in the home gives us the power to be who we want to be, and to do what we want to do in our homes. To shape our home into something which expresses who we are. To act on our free will and make things happen. We have the power to be the masters of our own destiny.



"There's nothing to limit me at home...I can say what I want, feel what I want, do what I want."

Catherine, UK

HOME HAS PROVIDED US WITH WHAT WE'VE NEEDED FOR CENTURIES



**HOWEVER,
THE CONTEXT
OF TODAY IS**



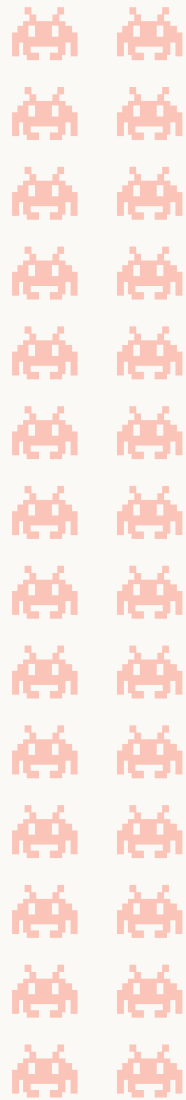
**SHAKING ITS
FOUNDATIONS**

HOME INVADERS ARE PUTTING PRESSURE ON HOME



A combination of external factors are putting pressure on home, impacting our ability to achieve the feeling of home.

Home is being squeezed, and poked, and prodded by a series of 'Home Invaders' to the point where it's no longer recognizable.



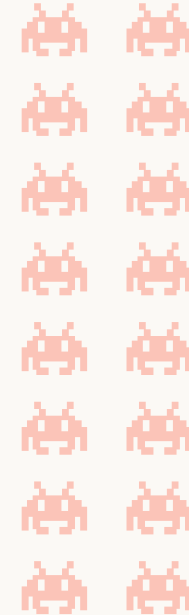
WORK



Our work life and home life are blurring.

For many of us, our home is also our office. As such, we are seeing the traditional dimensions of home (and the spaces within it) changing. From the bed, to the couch, to the kitchen table, our once private and personal home spaces are becoming places to log on and lean into work.

The gig economy and the increasing need for side hustle is changing how people leverage and monetize their space and time. While “work from anywhere” can give us more leeway in how we choose to make our livings, work also has the ability to compromise our **comfort** in the home, as the boundaries between working hours and working space are becoming more permeable.



FINANCES

The unreal state of real estate has brought instability to the everyday.

Stagnant income and employment insecurity has mixed with rising property prices to result in an entire generation being priced out of the real estate market - pushing them to become permanent renters and making it difficult to lay down roots.

On an individual level, the threat of rising rent, “renoviction” or market chaos undermines stability and belonging. People are becoming less likely to build connections in a community when they believe their place in it is temporary.



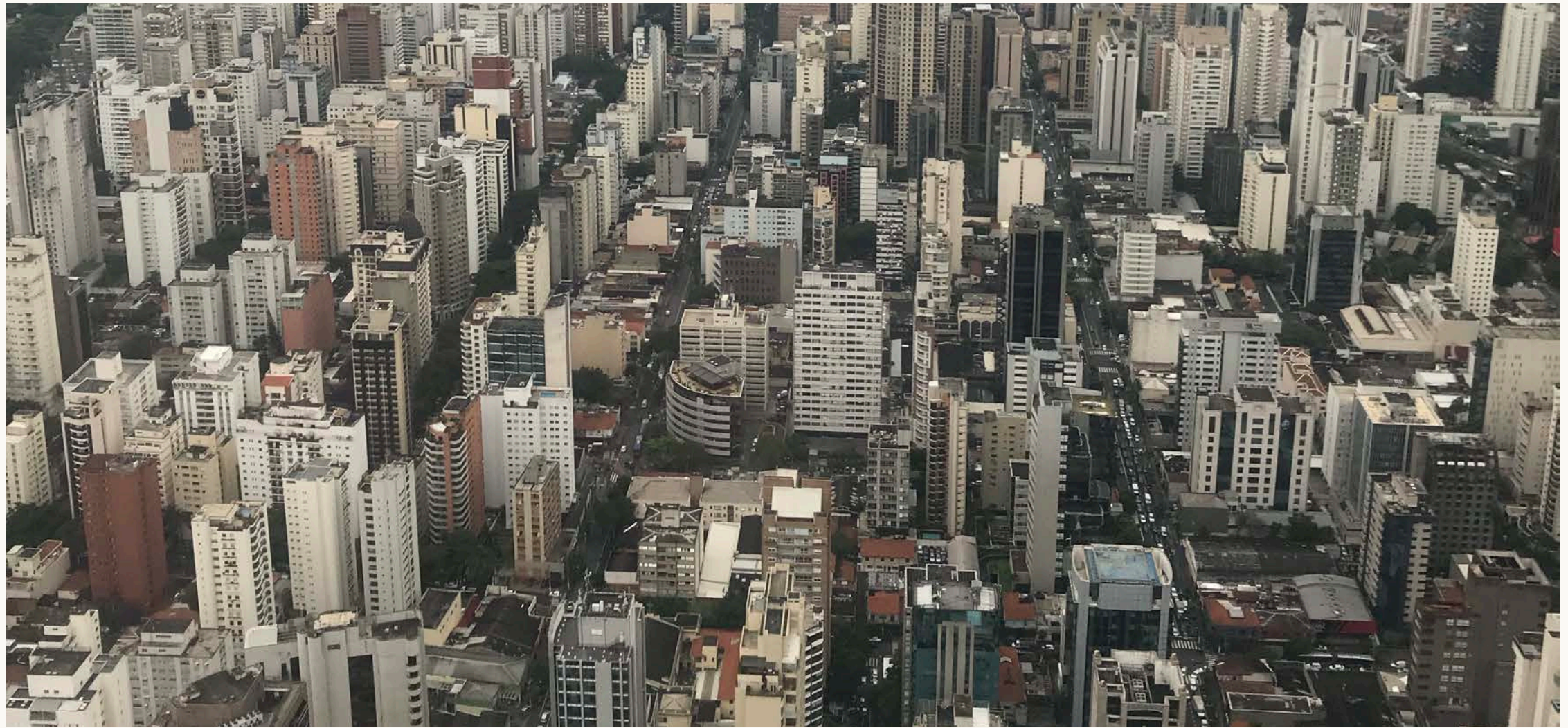
TECHNOLOGY

Technology is integral to our lives at home, but it's a complicated relationship.

On one hand, technology works in tandem with our core needs. It enhances protection from the outside world, increases our feelings of safety, security, and autonomy. It give us back precious time to spend with our loved ones; and it can make us feel more comfortable.

However, technology can also disrupt us from feeling present in the home. Living in a culture of being 'always on' means we are constantly being interrupted and disturbed by emails, texts, calls, and updates...which can dilute real life conversations and reduce the feeling of **creativity** in the home.

POLARIZATION



Living in an infinitely fractured, conflict-fueled media environment means that we no longer share much in the way of collectively-recognized truths.

Politics has always been a wise topic to avoid at the dinner table. But increased polarization has taken the strain to a whole new level, turning close friends and family members into social pariahs overnight.

Now, the mundane can become controversial, turning home into more a battleground than a sanctuary.

Even the once-safe world of sports has become a cause for conflict - with freedom of speech and protest debates finding its way into Monday Night Football, and consequently, political division can become a byproduct of a social event that used to simply be about brewskis with boys (or girls).

**BUT INSTEAD
OF BOARDING
UP OUR
WINDOWS,
LOCKING OUR
DOORS, AND
FOLDING
UNDER THE
PRESSURE...**



WE ARE SHIFTING OUR PERSPECTIVE OF HOME



...and learning to manage, mitigate, and mediate the effects of 'Home Invaders'

With the pressures of Home Invaders, along with wider social unrest, there's a universal feeling of lack of control.

However, instead of creating an impenetrable fortress to protect ourselves from the big bad world, people are turning home not into a place to hide, but one where they can learn to manage the modern madness.

**MAKING ROOM FOR
A NEW CONCEPT:**

“LIVING OUTSIDE THE BOX”

**BECAUSE DESPITE THE
FUNCTIONAL CONDITIONS OF
HOME CHANGING...**

**THE
FEELING OF HOME
WE ALL ASPIRE TO
REMAINS THE SAME**

**SO WHERE DO BRANDS
FIT INTO THIS NEW
CONCEPT OF HOME?**

SOUND **ADVICE**

LIVING OUTSIDE THE BOX

1. MAKE HOME **EVERYWHERE**
2. FOSTER **BELONGING**
3. ENCOURAGE **CREATIVITY**
4. ENHANCE **COMFORT**

FIND YOUR PLACE - AND **EARN** IT.

The 21st century home is experiencing breakneck change, and to thrive within it requires brands to shift their perspective and understand that they are only ever a guest.

Brands must recognize that every home features an interplay of feelings to protect and invaders to mitigate. To be a welcome guest, brands need to bring real meaning to their role by complimenting or improving upon what is already in place.



MAKE HOME EVERYWHERE

As home gets squeezed, we're beginning to look for it outside our primary dwelling more and more. Brands must confidently and consistently associate themselves with the tenets of home, wherever they are.

Create allegiance and value by offering an ownable version of comfort, stability, belonging and creativity at home, and wherever the day leads.

FOSTER BELONGING

AND BE THE ANTIDOTE TO POLARIZATION

In a fragmented and chaotic world, one of the most difficult things to manage has been the increase of domestic disconnection.

While we are still trying to navigate this new terrain, there is a great opportunity for brands to provide people both with tools to feel in control of their home and create opportunities for connection.

Example

NINTENDO LABO

By supplying a few sheets of ingeniously designed cardboard that can be crafted into different extensions for their Switch console, such as a fishing rod and a robot, Nintendo has created endless opportunities for people to turn away from their individual screens and engage with their family and friends.



ENCOURAGE CREATIVITY

AND BE A PARTNER IN HOME-BUILDING

Home is an imperfect work in progress that reflects both our successes and failures. Therefore notions of domestic perfection are being replaced by ideals of betterment. Brands need to recognize this sweat equity and tap into its potential by providing opportunities for people to grow and learn.

Example

INSTANT POT

The Instant Pot became an overnight sensation because it not only provided convenience, but because it also promoted activity. By making it easier for people to get adventurous with cooking, it struck a balance between being a time-saving device and a tool for creativity and connection.

Instant Pot®

ENHANCE COMFORT

AND RECONSIDER YOUR BRAND'S ROLE IN THE HOME

Bedrooms are not just for sleeping and living rooms are not just for relaxing any more. Our space has been remixed and our homes are both contracting in space and expanding in function.

Brands need to think beyond the traditional blueprint and discover how they might better fit this evolving context – and on a grander scale, reimagine the different problems a product can solve.

Example

SAMSUNG FRAME

How we get what we watch on our televisions has undergone radical change, and Samsung realized that the design must adapt as well. We no longer want our TVs to have an imposing presence that dominates our space. They must instead fit within our constraints or blend into the background.

Samsung's Frame accomplishes both by embracing minimalist design and providing a secondary function as an art gallery.

SAMSUNG



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