



2019

An Exploration of Privacy

Life at Home



REPORT

Each year, we get a little bit closer to understanding **what people need** from their home.

In 2018, **something caught our eye**. Privacy is one of the most important needs for creating the feeling of home, but one in four people, globally, find other places better able to fulfill this need than their own home.

So this year **we dived into privacy**, to explore its importance in providing a better **everyday life at home**.

01 Setting the scene

02 Privacy: the gap

03 Privacy: an enabler

04 Privacy: a complicated ask

05 Privacy: to thrive at home, and in life

06 CONCLUSION: WHAT THIS MEANS FOR IKEA

WHAT WE LEARNED

Belgium: Executive Summary

1

There is a privacy gap

In Belgium, **86%** believe having **privacy is a fundamental right** in our own home. Privacy may *feel* important, but **isn't always possible to get** due to where we live, who we live with and what our roles are in the home.

When we fail to achieve privacy, it impacts our wellbeing, making us feel **frustrated** and **anxious**.

2

We need to rethink privacy as an enabler

The value of privacy doesn't lie in 'doing nothing', but the wellbeing and personal growth benefits it releases, including **relaxation, recovery, focus and play**. In Belgium, **64%** say privacy is important to achieve time and space for activities that enable personal growth.

The **control we have over our space** also impacts how easily we can achieve privacy in the home.

3

It's not always easy to ask for privacy

Privacy doesn't always feel easy to ask for. In Belgium, **9% don't feel we have a right to ask** for privacy at home.

The various ways of asking or signalling for privacy differ in how effective they are – but if the sense of **belonging** in the home is strong, it's more likely we will both give and receive privacy from those we live with.

4

Privacy helps you thrive in life

Privacy has the power to unlock positive emotions. In fact, **68%** in Belgium agree that privacy is **important to our wellbeing**.

Privacy allows us to truly be ourselves, not just be *by* ourselves. This helps us survive day-to-day stresses and, above all, helps us **thrive in life**.

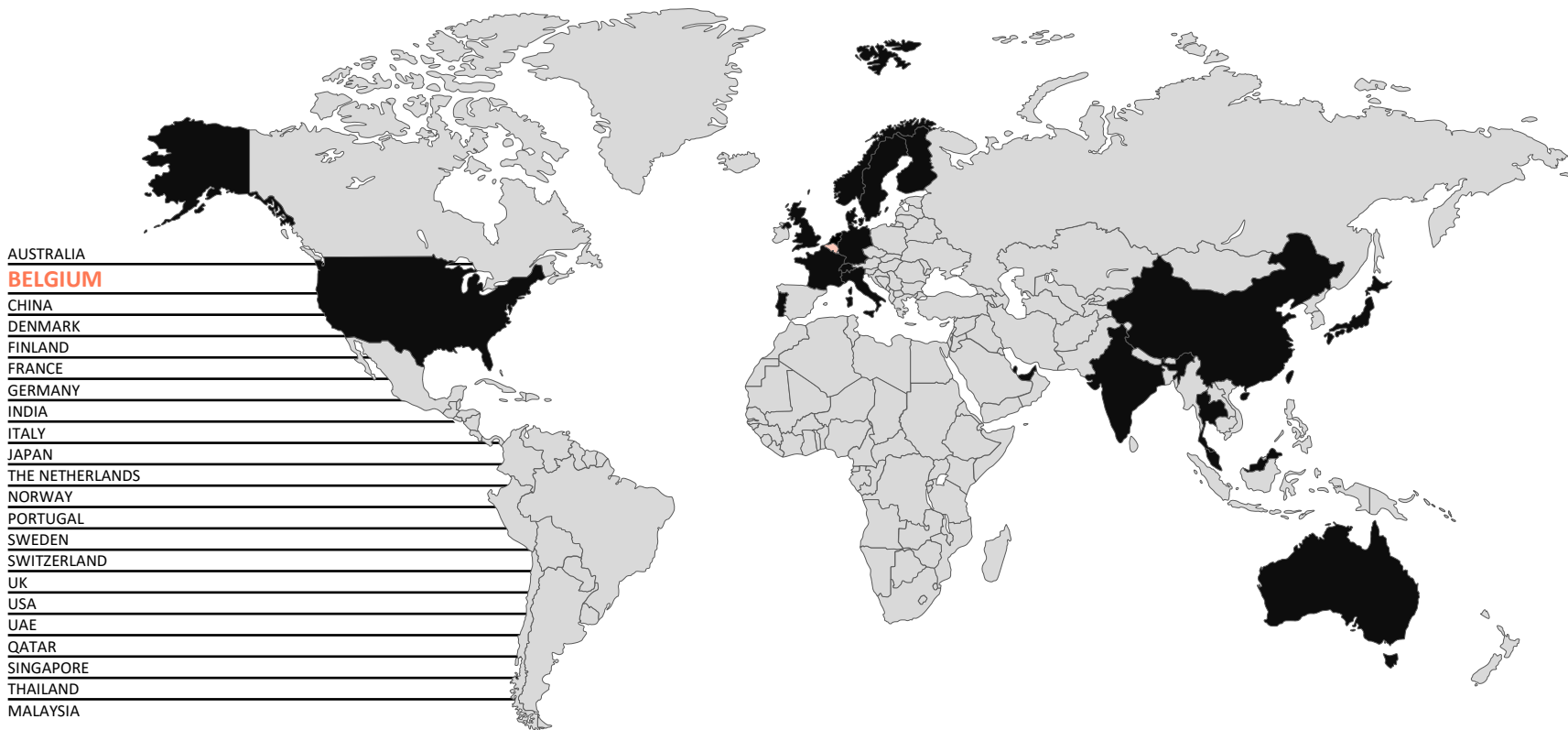
01

OBJECTIVES & METHODOLOGY

Demographics

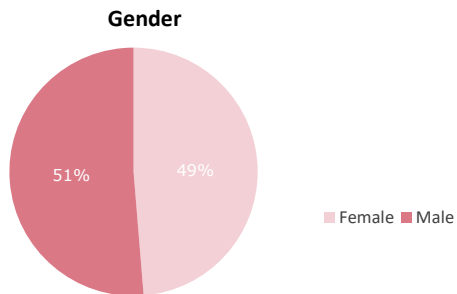
Market report | Belgium

■ Surveyed country
■ Country focused on for this report

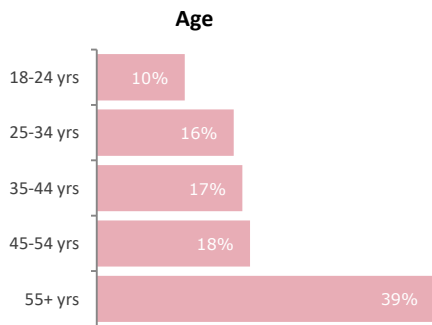


BASIC DEMOGRAPHIC DATA

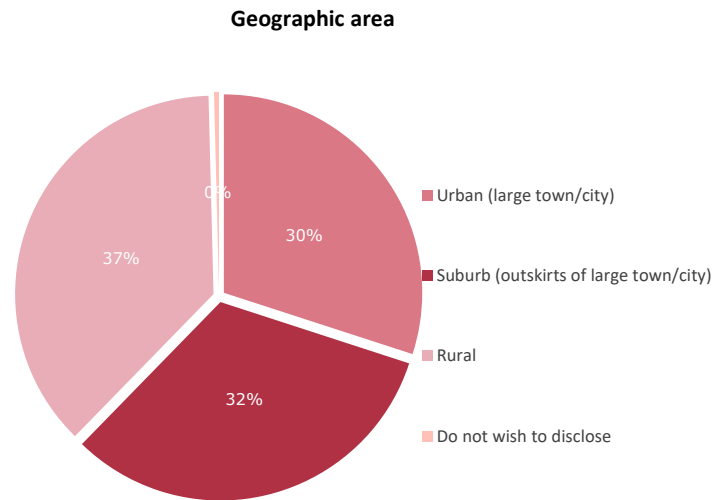
Q: Please indicate your...



Q: What is your age?



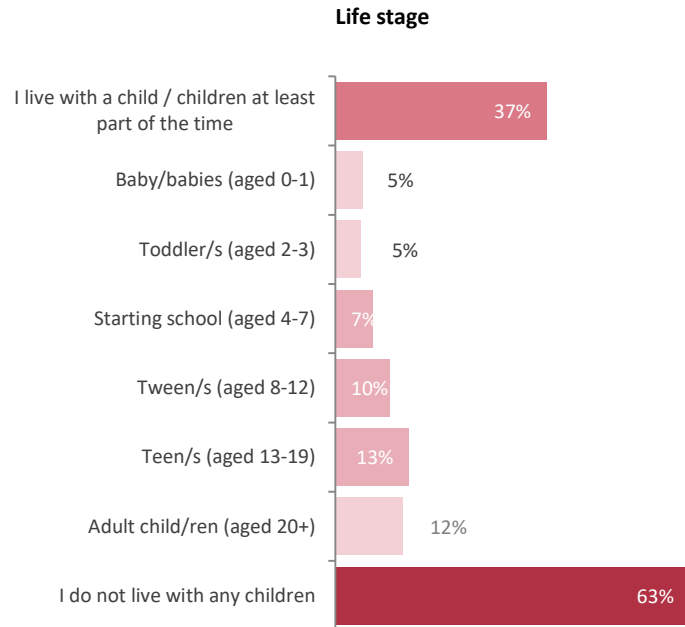
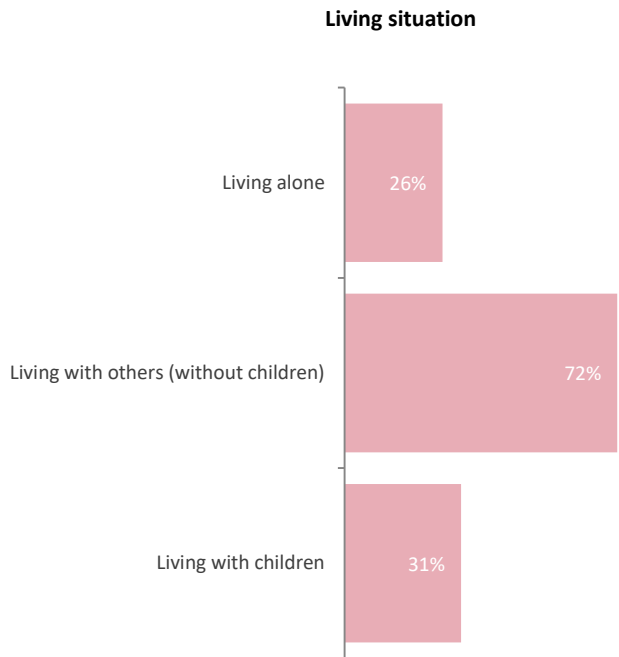
Q: Which of these best corresponds to the location in which you live?



LOCATION AND LIVING SITUATION BREAKDOWN

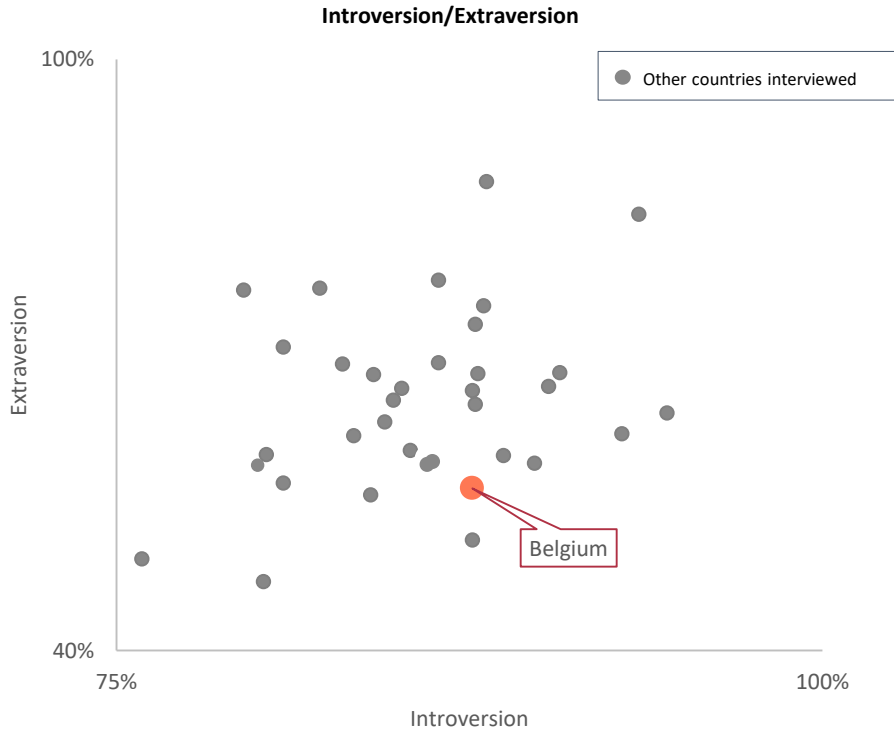
Q: We know that increasingly, people are living in different combinations at home. Still thinking about the people you live with, which of the following living situations do you identify with?

Q: Which of the following descriptions describe your current living situation?

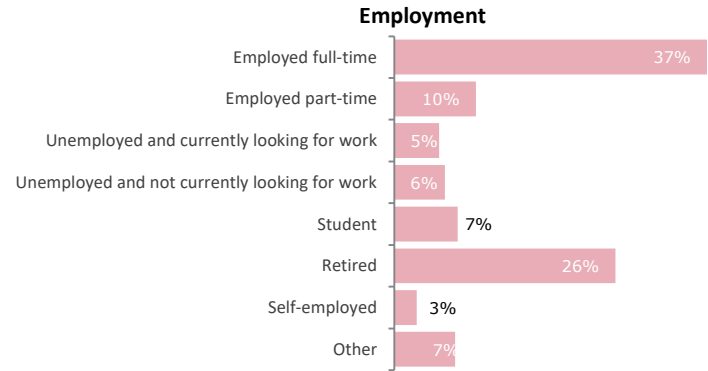


PERSONALITY, INCOME AND EMPLOYMENT BREAKDOWN

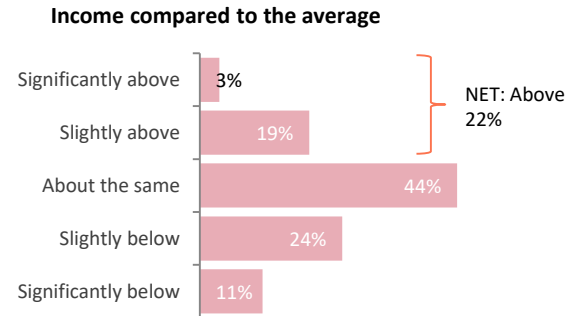
Q: To what extent do you agree with the following statements?



Q: Are you currently...?



Q: How do you think your household income / finances compares to your local average?



02

CONTEXT

Privacy: the gap



PRIVACY TODAY

What did we learn? Privacy is a necessity, but can feel inaccessible.

In 2018, we learnt that globally, privacy is **one of the most important emotional needs of home**, but it's also one of the needs that we don't always feel we get enough of where we live.

This year, our research shows us that privacy is much more than an emotional need of home; **to the many people, privacy feels like a *right***. People can't imagine a world without it and naturally seek it out.

We looked at the role of income and personality on our ability to satisfy the need for privacy. We discovered that these aren't what matter most. Instead, **it's about context** – where we live, who we live with, and our roles in the home. These are the factors which create the privacy access gap.

86%
in Belgium
believe it is **their
right to have privacy**
in their own home

11

“ Without privacy, I wouldn't have a relationship with myself...

Privacy is my right because I need to be with myself before I can love others. “

RANDY, 65+, NYC



PRIVACY AS A RIGHT

Today, we seek privacy at home, at work, and in public

For most of us, the right to privacy flows across different aspects of our lives. Asserting the right to privacy may involve claiming the time or space for privacy, like telling your family you're having a bath.

It can also be choosing not to do or say something, in order to protect the feeling of privacy, like not discussing your weekend plans with your colleagues.

WE SEEK PRIVACY

AT HOME by finding moments of privacy either on our own or with others.

“Although I have a good relationship with my lover, we both need individual space. I need quiet moments when I feel I am the only one in the world.”

Aibo, 25-34, Shanghai

WE ASPIRE TO PRIVACY

AT WORK by controlling what we share with colleagues about our work or our lives outside the office.

“I always keep in mind that anything I tell my co-workers may be shared with others... If I share anything, I try to keep it positive, not drama.”

Janie, 45-54, NYC

WE SEEK PRIVACY

IN PUBLIC by protecting our anonymity, because we don't feel strangers have a right to know who we are.

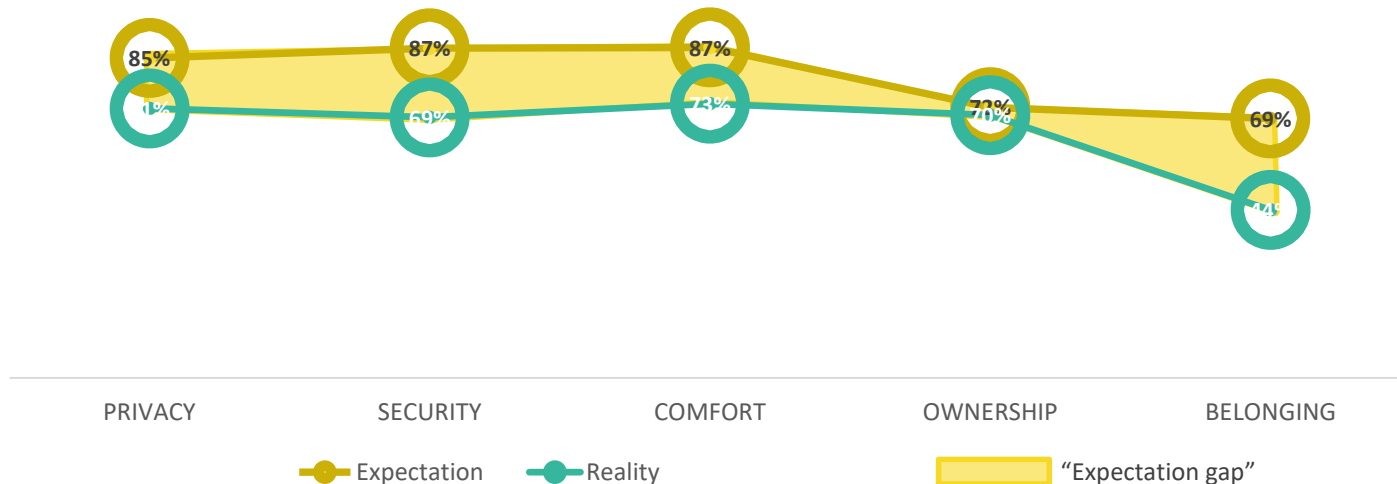
“I need to go to a place where no one knows me to feel relaxed. I feel that I am completely on my own in that moment, and my thoughts do not need to be influenced by others.”

Huakai, 25-34, Shanghai

EXPECTATION VS FULFILMENT

In 2019, we know that privacy is one of the most important needs in the home

How important is it that your own home provides these needs, and is your home where you get it most?

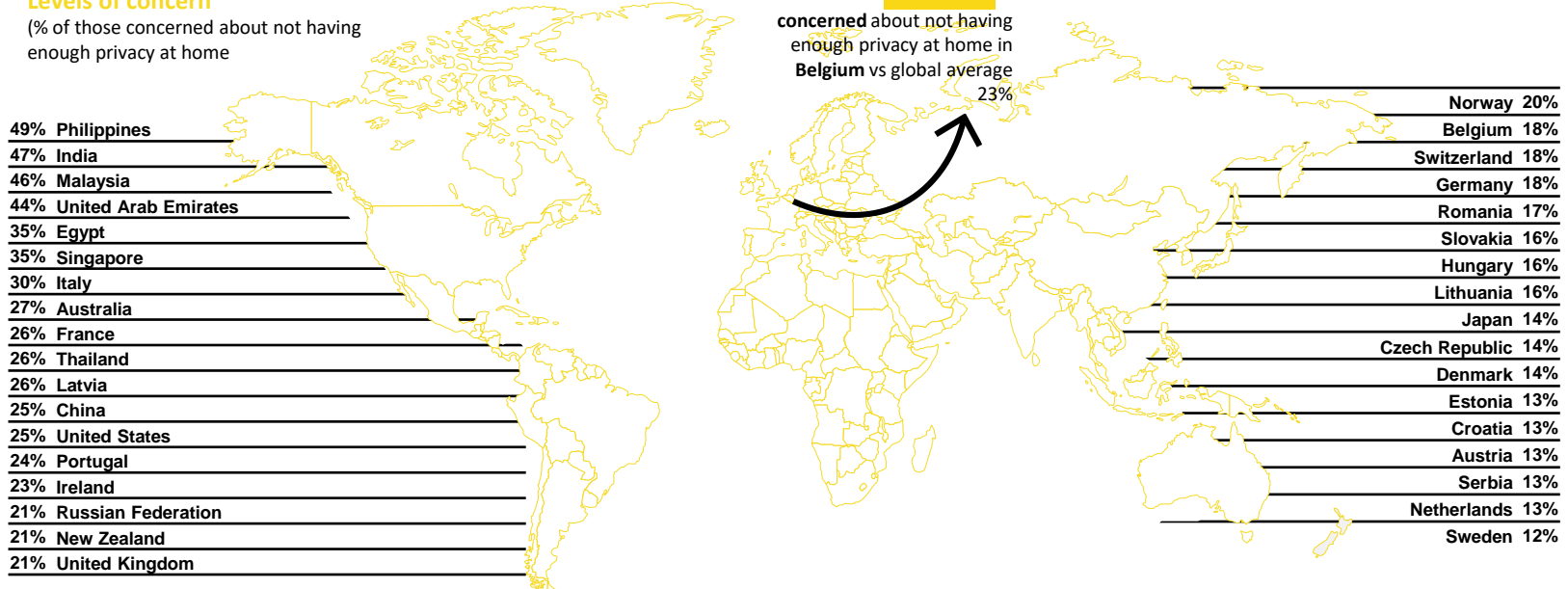



EXPECTATION VS FULFILMENT

Some countries struggle to get privacy at home more than others

Levels of concern

(% of those concerned about not having enough privacy at home)





**But as cultures evolve, so
do our expectations and
reality of privacy at home...**

THE CULTURE OF PRIVACY

In Shanghai, individual privacy is often lost to the collective

Y. Wang lives in Shanghai with her husband; her parents live in the building next door. She knows she's being watched by CCTV when she's out and about, and by her parents from their place, so she feels she has to behave.

"But in your own home, you can do what you want!"

In cities in a **collectivist society**, families and friends put more pressure on one another to be open, relating 'privacy' to 'keeping secrets'. Equally, everyone 'knows' the Government keeps a watchful eye over individuals in public, using **CCTV**, but also across digital channels such as **WeChat**.

Caught between intense familial relationships at home and the surveying eye of the Government, **individual privacy can be hard to come by.**

43%
in China say feeling obliged to be sociable is a barrier to privacy, vs. 20% globally

THE CULTURE OF PRIVACY

42%
in India stay outside
home as an excuse
to get privacy, vs.
15% globally

In Mumbai, privacy is increasingly accessible

Neha lives in Mumbai with her parents and siblings in an apartment which is *“good but can't be considered luxurious.”* She is always surrounded by her family and can only get time alone when she's studying.

As living situations gradually shift from multi-generational, crowded households to apartment living, privacy is **becoming more accessible**.

However, individuals still have to work hard to find their moments of privacy, often seeking private **spaces outside of the home** (such as a local park).

This **complicates their relationship with their home** – sometimes it helps them feel private; sometimes they have to resort to more public alternatives.

THE CULTURE OF PRIVACY

In London, San Francisco and NYC, the privacy status quo is shifting

Usman lives in London in a crowded house with his two sisters and three brothers. He doesn't have his own room and must sometimes sleep on the floor or share a room with his dad. The dream is to move out and get his own place.

In cities with more individualistic societies, such as those in the UK and the US, a degree of **privacy at home is assumed**.

However, **urban migration** means these cities are denser and feel more crowded. Because of this, rents are soaring and buying a home is even harder.

For those who cannot afford their ideal home, they have to compromise. 'Settling' for something less can make **privacy feel aspirational**.

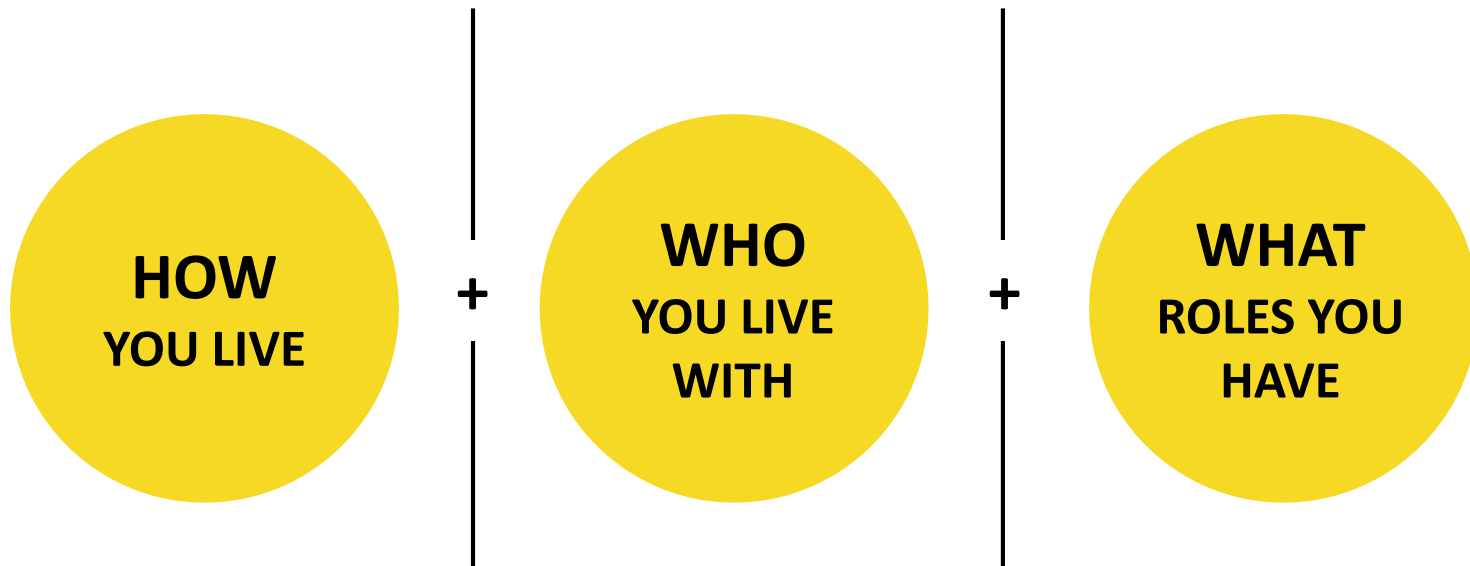
26%

in the US and UK
think they **don't**
have enough money
to achieve privacy
vs. 21%
global average

19

ACCESSIBILITY OF PRIVACY

But it is not only **what part of the world you live in** that impacts your privacy at home. **It can also be the context within which you live...**



ACCESSIBILITY OF PRIVACY

Privacy at home seems harder to achieve in urban areas

Cities feel busier, noisier, more crowded and more lively. Life in a city can feel more intense and stressful.

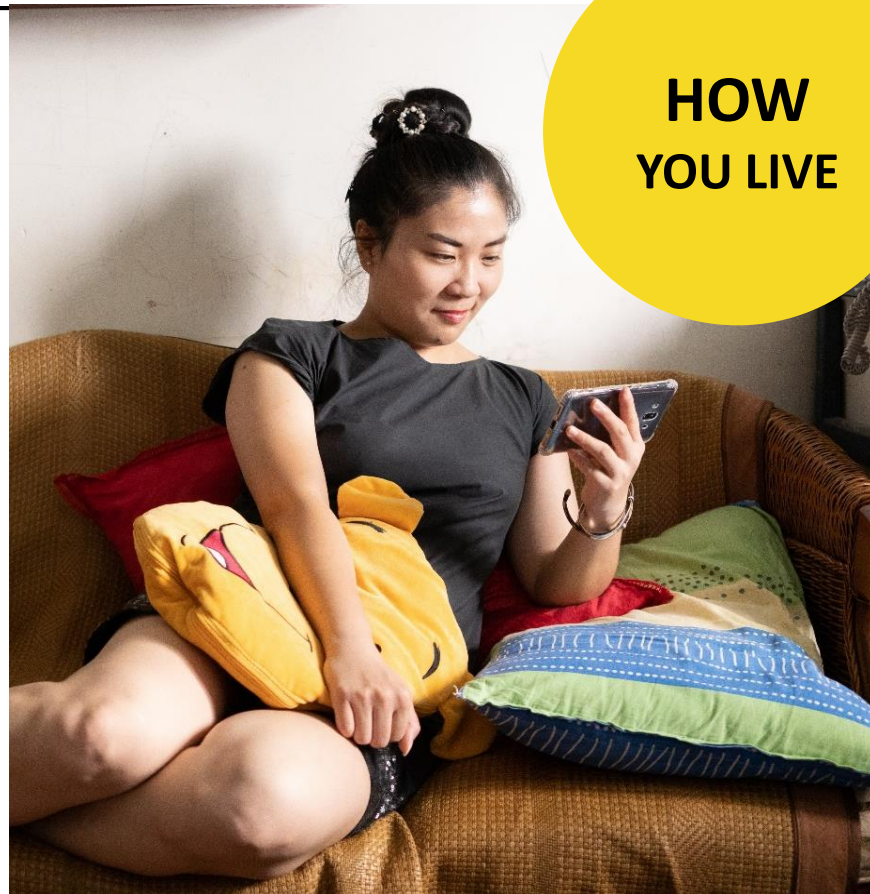
Urbanites find it harder to achieve privacy, compared to rural dwellers, because they **feel hyperconnected to what is going on beyond the four walls of home.**

22%

of urbanites in Belgium agree that **sensing the outside world** gets in the way of achieving privacy, vs. **16% of those living in a rural area**

20%

of urbanites in Belgium agree that **always being connected to social media** gets in the way of achieving privacy, vs. **11% of those living in a rural area**



MACRO TRENDS

The private development of cities blurs public and private boundaries

The city is constantly changing and developing as **city planners** and **private developers** try to keep up with demand.

In Mumbai, multi-generational living is being transformed by the development of **2/3 BHK* high-rises**. Some London developments (such as Kings Cross) are creating privately-owned public spaces.

These new developments create **new boundaries between what is public, what is private, and what is private in public**.

Some green spaces, such as roof terraces and shared private gardens, can create social division due to unequal access, and, as a result, impact **some people's ability to find spaces for privacy in the city**.

*BHK is a notation used to describe the layout of an apartment in India. "1 BHK" means a flat has 1 Bedroom, 1 Hall/living area, and 1 Kitchen

"My boyfriend isn't allowed to access his building's roof garden because he rents through the council – it feels like segregation!"

Joanna, 45-54, London

HOW YOU LIVE

ACCESSIBILITY OF PRIVACY

Privacy at home is impacted by the quantity and quality of relationships at home

You can only achieve privacy with the cooperation of those you live with. This is often more difficult if you live with:

- A **larger number** of people, because there are varying needs to consider and expectations of privacy may differ
- People with whom you **don't have a close relationship**, because it makes it harder to feel comfortable asking for privacy.

81%

of people living with **STRANGERS** globally need to be able to **close the door** to achieve privacy, **vs. 69% global average**

35%

of people living in **MULTI-GENERATIONAL HOMES** globally use **work as an excuse** to get privacy in their home, **vs. 22% global average**

46%

of people living **WITH OTHER FAMILIES** globally feel an **urgent need for more privacy** in their home **vs. 26% global average**

**WHO
YOU LIVE
WITH**

MACRO TRENDS

In cities, we're living with people for longer, so these hurdles aren't going away

It isn't only students who are flat sharing.

As the **price of renting is rising** in cities like New York, London and Amsterdam, **'Generation Rent'** are using flat-shares and co-living as a way to combat rising rents past their 20s and into midlife.

Living with strangers, other couples or other families can mean there are more **complex relationships** that need to be navigated at home.

This can be exacerbated when **space is limited or inaccessible**, such as the lack of a lounge in a flat-share where bedrooms are used as social spaces, or an apartment block with a garden or gym which can only be used by certain residents.

"We don't have a lounge and are often in each other's bedrooms, but ideally, every home should have a no man's land and an everyone's land."

Maria, 18–24, Amsterdam

**WHO
YOU LIVE
WITH**

ACCESSIBILITY OF PRIVACY

Caregiving is the no.1 barrier to privacy globally

Being a caregiver means moments of privacy are often **ruined, or prevented from happening** in the first place.

This is usually due to:

- **A lack of time** – Looking after those they live with, be that a partner, child or parent, means the home can become another place of work, not rest.
- **Emotional load** – Caregivers feel obligated to fulfil their duties towards other people, so they tolerate interruptions and don't prioritise themselves.

**WHAT
ROLES YOU
HAVE**



#1

Needing to take care of others is the **no.1 barrier to privacy at home** (23%)

50%

of parents of young children **name 'need to take care of others' as a barrier to privacy**

MACRO TRENDS

As we have more roles to play, it's harder to create space and time for privacy

As more women are staying in work, the traditional role of caregiver is shifting and adapting as others in the home take on, or share, the role.

Playing more roles across work and home can make life today feel stressful. We are **expected to be perfect parents, co-workers, friends** – a pressure compounded by social media.

The combination of being interrupted by children at home, by colleagues at work, and by notification overload in our digital spaces, **can feel overwhelming and anxiety-inducing.**

Finding privacy becomes an important part of recharging but can be increasingly difficult to find as the **roles we play become more fragmented and complicated.**

“I can only go to my private place in the evening, after I have finished being a mother, wife and daughter-in-law.”

Sarah, 25-34, Amsterdam

**WHAT
ROLES YOU
HAVE**

PRIVACY AS A RIGHT

A world without privacy would impact me, we and our world

ME:

We need private space so we can be our full selves.

We need time on our own to truly get to know ourselves. The feeling of always being watched and having to 'behave' in public would feel stifling and claustrophobic.

Without privacy we would struggle to feel like an **individual**.

46%

In Belgium feel **truly themselves** when they are private vs. 54% globally

WE:

We need intimacy to build and nurture our relationships.

We need privacy (intimacy) to have deeper and better conversations. Not being able to get to know each other would make our interactions feel robotic and mechanical.

Without privacy our relationships would feel **forced and superficial**.

66%

In Belgium seek privacy to **improve their relationships** vs. 76% globally

OUR WORLD:

We need respite from crowded, noisy and intrusive public spaces.

Particularly in individualistic societies like the UK, US and Netherlands, we value personal space. Privacy is a respite from the hustle-and-bustle of cities that can feel overwhelming.

Without privacy we would have no **sanctuary from the world**.

16%

In Belgium say **noise and smells from outside get in the way** of privacy at home vs. 20% globally

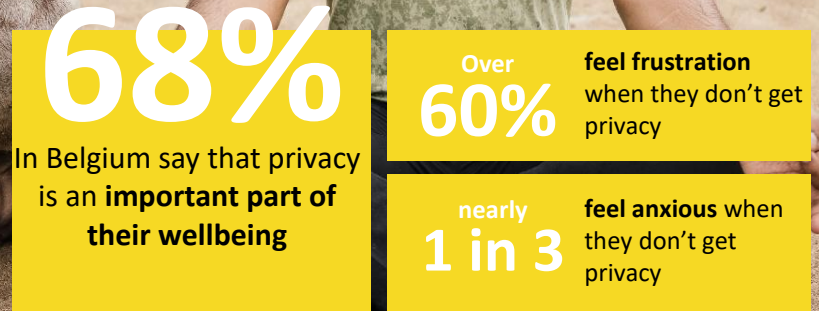
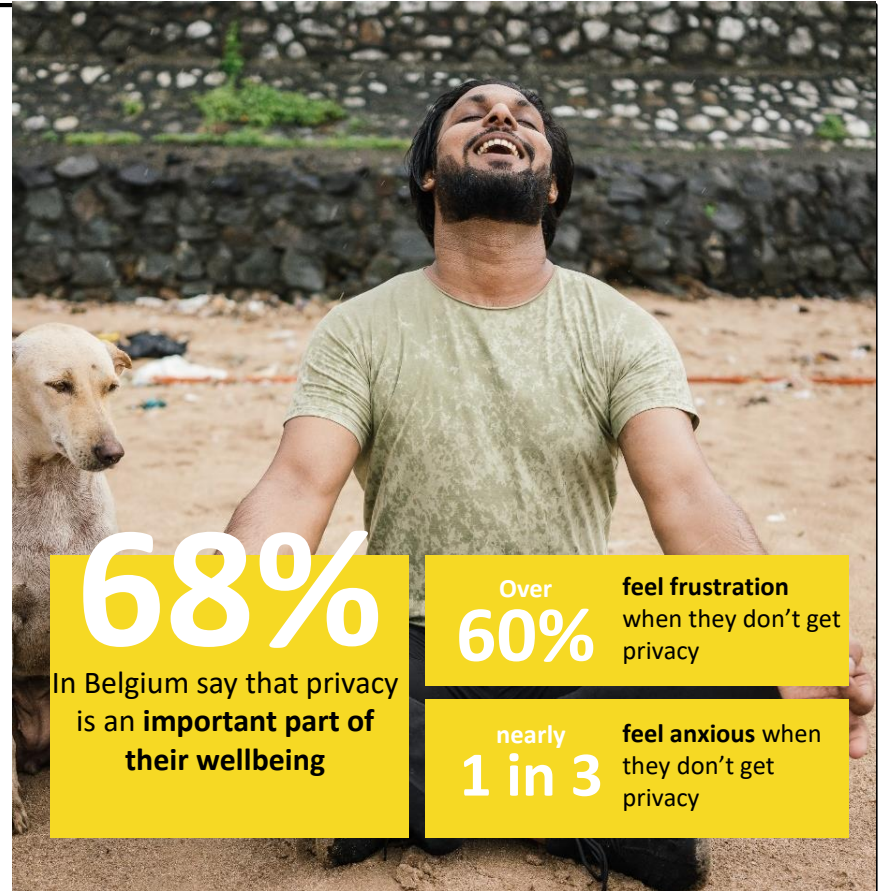
PRIVACY AS A RIGHT

Failing to achieve privacy impacts our wellbeing

Privacy isn't just 'nice to have'. People see privacy as something **that plays a vital role in their wellbeing.**

If we can't fulfil that need for privacy, it can affect our emotions in many ways, including **feelings of frustration and/or anxiety.** That frustration rises among **women** (see Chapter 4 to find out more.)

Failing to achieve privacy means failing to achieve a sense of wellbeing - that is why it **feels like a fundamental right.**



03

UNDERSTANDING PRIVACY

Privacy as an enabler

REFRAMING PRIVACY

What did we learn?

We need to re-think privacy as an enabler.

Our research shows us that to appreciate the importance of privacy, we need to **reframe how we think about it**.

Whilst we often think of privacy as 'doing nothing', we **found out it can be so much more**. To truly benefit from privacy we need **both mental and physical space**, as well as the **cooperation of others**.

By **re-thinking privacy** and understanding its importance for our **wellbeing and personal growth**, we can fully appreciate its role in creating a better everyday life.

98%

In Belgium **enjoy doing deliberate, specific activities** when they have privacy at home

30

PRIVACY AS AN ENABLER

Privacy's true value lies in what it enables us to do

Privacy isn't **the end goal** – its value lies in the **wellbeing and personal growth benefits** it gives us.

These can be **lower-energy wellbeing benefits: restorative or relaxing** activities that help us get back to feeling ourselves, such as an hour of pampering after a busy week at work.

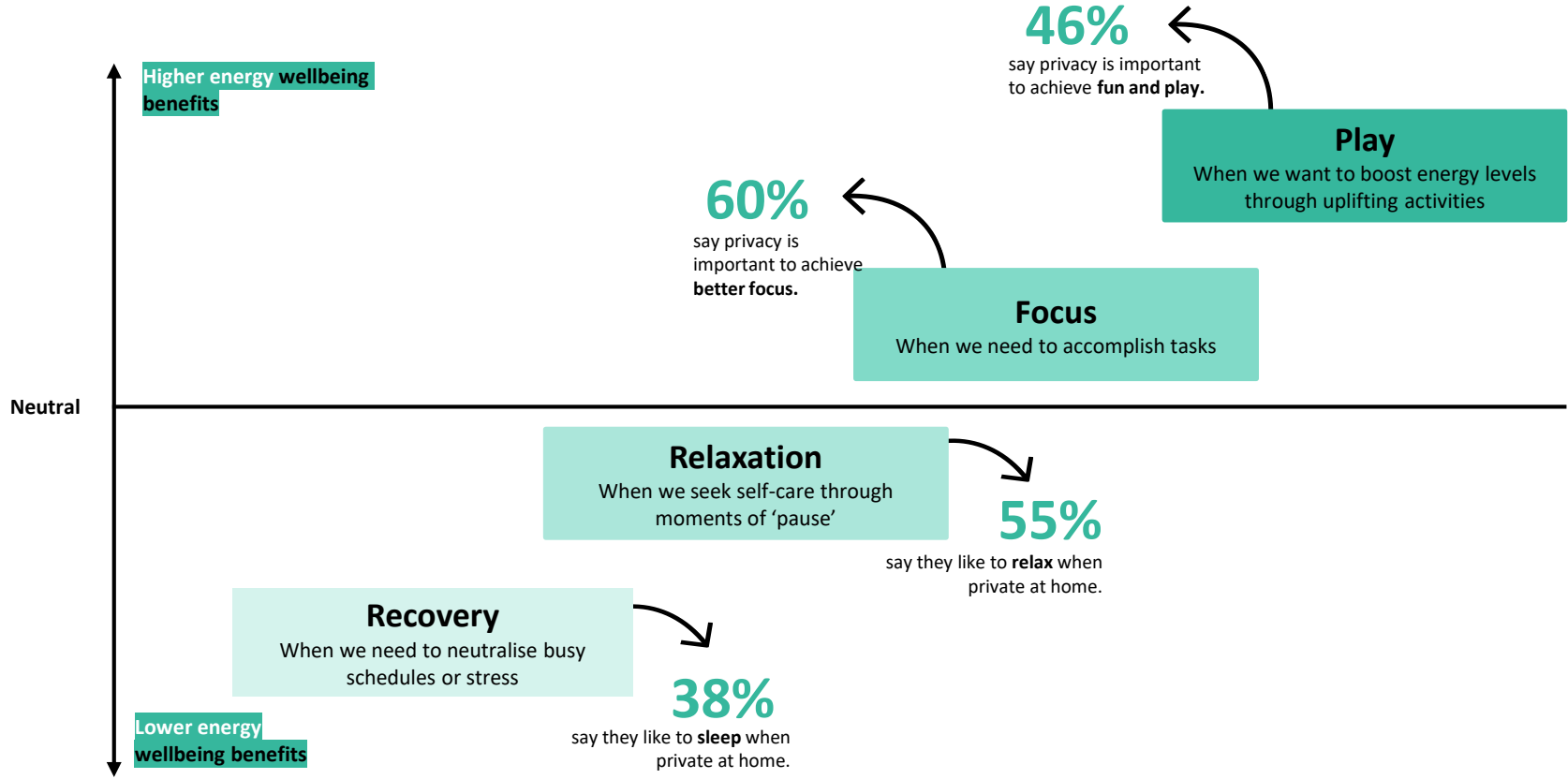
Privacy can also enable **higher-energy wellbeing benefits:** helping us get the headspace to **focus** on important decisions, or enjoy something **playful** like singing in the shower.

64%

In Belgium say privacy is important to achieve **time and space for activities that enable personal growth**



PRIVACY AS AN ENABLER



Q19 What do you enjoy doing when you have privacy in your own home, that you would not be as likely to do if it were not private? | Belgium n = 1000 & Q8 How important is having privacy to achieve the following? | Belgium n = 1000

PRIVACY AS AN ENABLER

Making the most of privacy often starts at home

RECOVERY

e.g. **Lying** or sitting in silence / **in the dark**, watching TV mindlessly, having a **hot beverage**...

“I had a very busy day at work and getting public transport home was stressful. I got home as quickly as possible and **crashed on the sofa.**”

Jay, 55-64, London

RELAXATION

e.g. **Pampering** sessions, doing **yoga**, having a **bath**, listening to **calm music**...

“I like taking time to have a **long relax in the bath** - feels cosy being engulfed by the water. Sometimes, I'll even have a beer.”

John, 65+, Amsterdam

FOCUS

e.g. Doing **homework**, talking to partner about **major decisions**, doing job **applications**...

“I was working at my desk. I shut the door as I don't want to be disturbed. **My work needs privacy** so I stay in the bedroom.”

K. Qin, 25-34, Shanghai

PLAY

e.g. **Singing** in the shower, playing **video games**, talking to **pets or yourself**...

“My husband is an introvert and would never dance in public, but loves **boogieing round the lounge** with our little boy.”

Katherine, 35-44, London

REFRAMING PRIVACY

Reframing privacy

#1

PRIVACY IS BOTH
INDIVIDUAL
AND SHARED WITH
OTHERS.

It is a **shared appreciation** or mutual understanding that the moment is private.

It's not privacy when those around us don't understand our needs, and disturb or interrupt us.

#2

PRIVACY IS AN
ACTIVITY.

It is **more than just 'doing nothing'**. We want to achieve something, whether that is big or small, functional or emotional.

It's not privacy when we aren't gaining something from it, such as a minute to reflect alone, or an evening bonding with loved ones.

#3

PRIVACY IS A
PHYSICAL
AND MENTAL SPACE.

It is **about getting in the right head-space** either through your mindset or your space.

It's not privacy when we don't feel we have the space or place, mental or physical, to get into the right mindset.

#1

PRIVACY IS BOTH
INDIVIDUAL
AND SHARED WITH
OTHERS.

FROM ...

Privacy is
being alone

TO ...

Privacy can be
achieved on our
own, with loved
ones, or a crowd of
strangers



MEET SEKAI

Sekai is a **Zimbabwean-Scottish-American-Brit living in Amsterdam**, studying towards her PHD.

Her childhood was spent moving from place to place, so home is associated **with people as much as space**.

Primarily, **privacy is alone time**, space without others to allow her to breathe, reflect, and 'be zen'. It is also important for her to use that privacy to connect with others, whether it is her **friends in Amsterdam, scrolling social media or Skype-ing her mum**.

“ It's **not stressful to hang out** [with close friends]. You're **not having to put on airs**, so I suppose we can have **private time together**. It's a relaxing thing to do to have those honest dialogues and feel like you're **not crazy for feeling certain ways about things**.”

#1: PRIVACY IS INDIVIDUAL OR SHARED

We can benefit from privacy both alone and with others

Privacy is typically thought of as simply 'being alone'.

In 1967, **Alan Westin** developed a framework for better understanding the states of privacy and revealed that these can be experienced...

... **Alone** (solitude)

... **With loved ones** or acquaintances (intimacy and reserve)

... And **total strangers** (anonymity)

Physically separating yourself from others; being alone

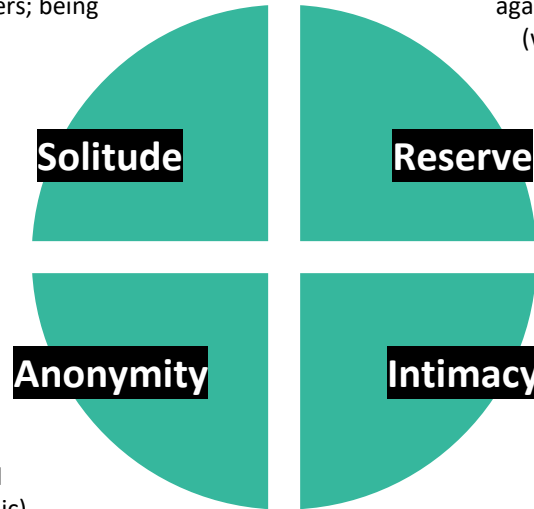


Being free from identification and unknown (in public)

Creating a mental barrier against unwanted intrusion (without being physically alone)



Secluded from the wider world whilst being part of a small unit



#1: PRIVACY IS INDIVIDUAL OR SHARED

Home is well positioned to offer solitude, reserve and intimacy

SOLITUDE

e.g. Having a **bath**, sitting in your bedroom with the **door closed**...

“I was reflecting on some important personal decisions. I went to my study room alone to not be disturbed.”

Tina, 25–34, Mumbai

RESERVE

e.g. Listening to **music**, wearing **headphones**, watching **‘my show’** on the communal TV...

“My bed is in the lounge, so I use my headphones to show that I want ‘me time’, even if my flatmate walks in.”

YX. Mi, 18–24, Shanghai

INTIMACY

e.g. **‘Date night’** with a partner, **‘movie night’** with flatmates, **being silly** with children...

“Protecting the collective privacy of our ‘flat family’ is what’s most important to me. I love our uninterrupted movie nights.”

Maria, 18–24, Amsterdam

ANONYMITY

e.g. Going for a **walk**, working in a **library**. NB: can only be achieved out of home...

“I love going to the mall and getting lost in my thoughts as I wander through from shop to shop. No-one bothers me and I feel free.”

Y. Wang, 25–34, Shanghai

#1: PRIVACY IS INDIVIDUAL OR SHARED

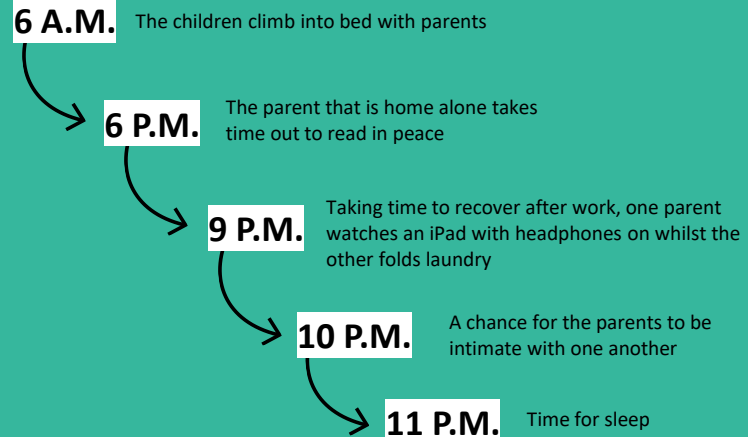
Our home spaces need to flex between different states of privacy

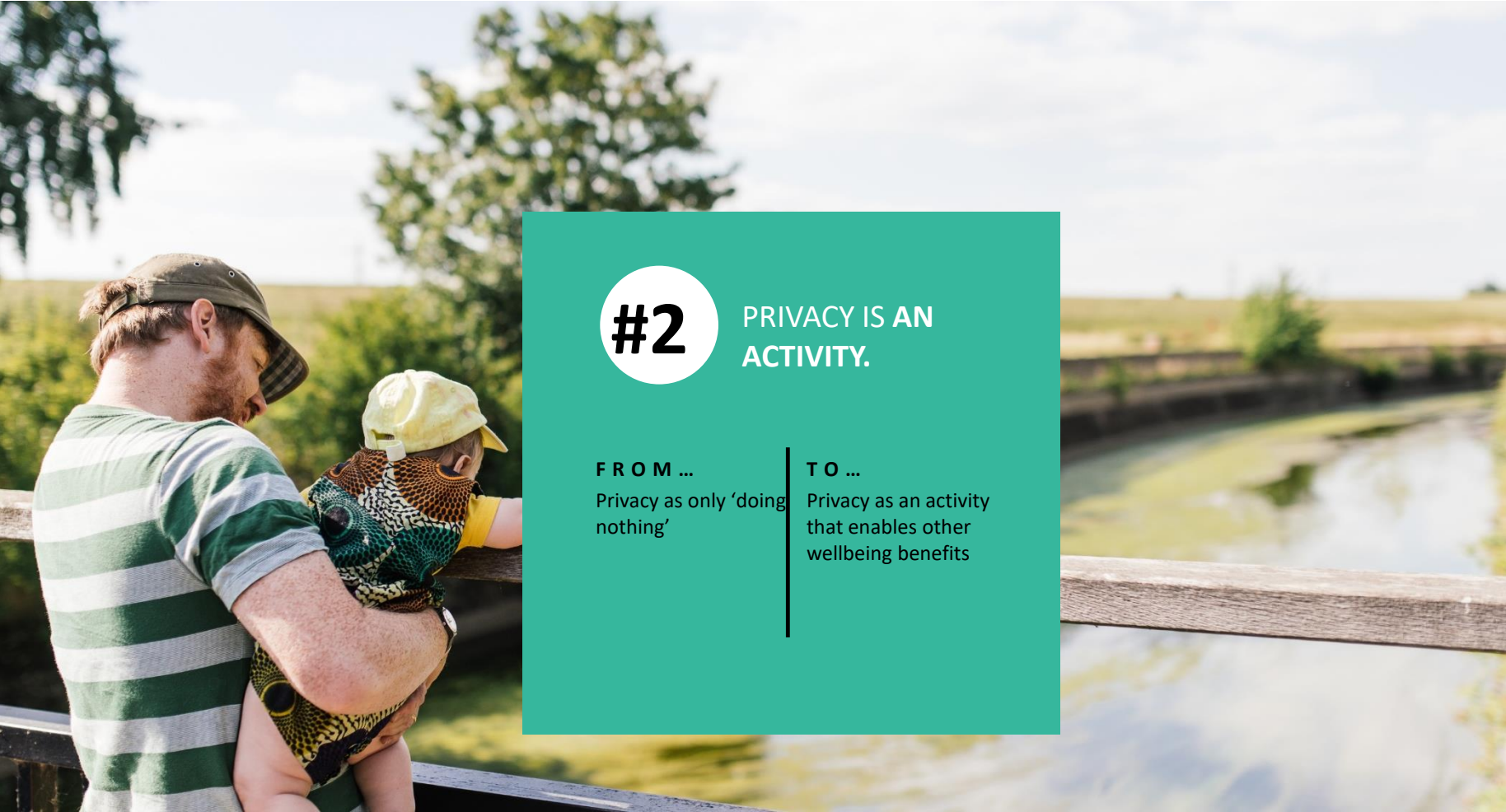
When we live with others our spaces need to be used for **solitude, just as much as intimacy.**

Throughout the day, the same living room might be used for reading a book, entertaining friends or for a quiet date night.

The more people and the smaller the home, the harder spaces have to work to cater to changing needs.

IMAGINE A DAY IN THE LIFE OF A PARENTS' BEDROOM





#2

PRIVACY IS AN ACTIVITY.

FROM ...

Privacy as only 'doing nothing'

TO ...

Privacy as an activity that enables other wellbeing benefits

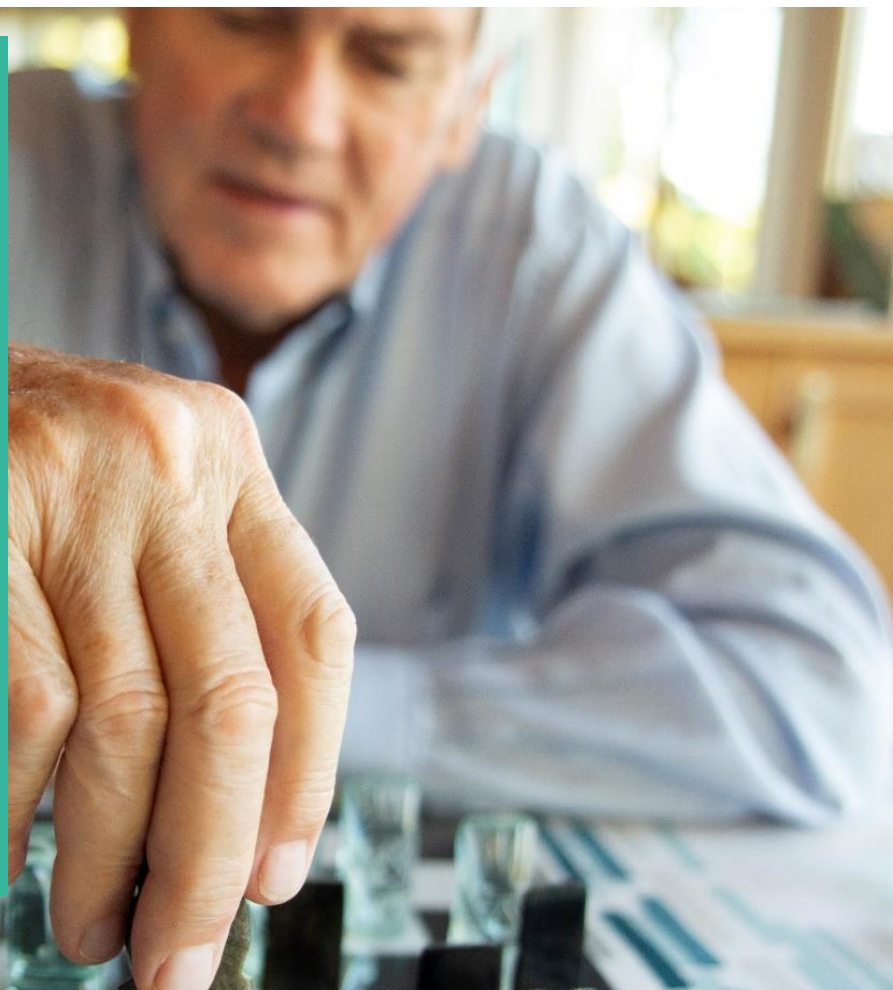
MEET JIM

He lives with his partner Lynn in **San Francisco**. Although they're not originally from San Francisco they have been there for over 30 years, so it **feels like a home away from home**.

His whole **home is his private place**. Whether it's having friends around for a dinner party, reading on his own, or spending time planning his next vacation with Lynn.

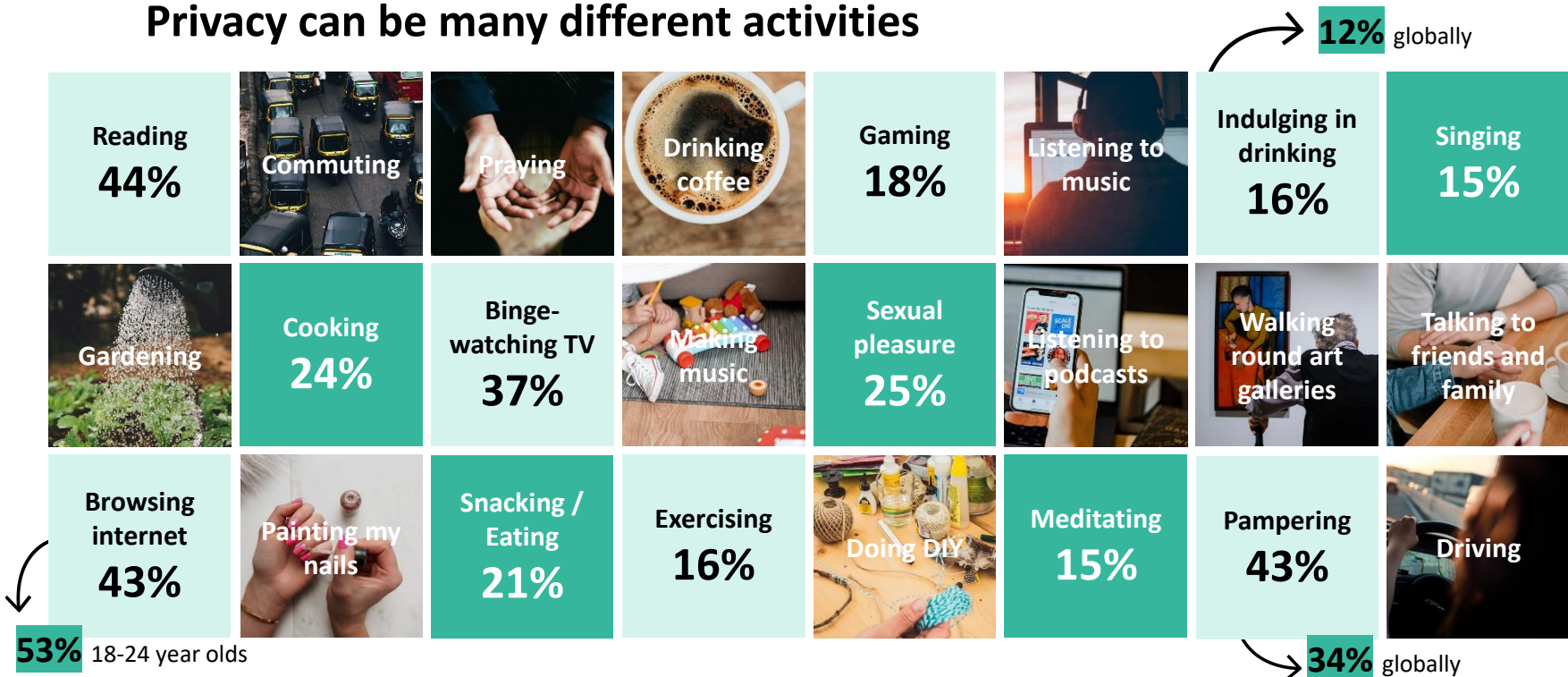
For them, privacy **isn't so much about where you are, but what you're doing...** although he did enjoy creating his own 'man cave' with a big TV for sports and a pool table.

“ You're **doing something** within yourself, even if it's just relaxing. That to me is privacy. It **doesn't have to be about a safe room** that nobody can get into.”



#2: PRIVACY AS AN ACTIVITY

Privacy can be many different activities



#2: PRIVACY AS AN ACTIVITY

Opportunities to find privacy are often spontaneous

There are different ways to find privacy and **get into a private state of mind.**

It can be a **planned activity**, an appointment scheduled into a routine, or something **more spontaneous.**

As privacy depends on the control we feel we have over our space it can be harder to plan and **easier to take opportunities** as and when they appear, both in and out the home.

75%

In Belgium agree they take their moments of **privacy when-and-where** they can get it vs. 25% who say they prioritise and plan for privacy

Proactive and planned		Spontaneous and reactive	
<p>"I schedule 'me time' into my diary on Excel."</p> <p>Sarah, 25-34, Amsterdam</p>	<p>"I go for a massage every day unless I have to work late."</p> <p>Zhu, 25-34, Shanghai</p>	<p>"Yesterday I had some relax-time on the couch. I was tired and needed some rest."</p> <p>Iris, 25-34, Amsterdam</p>	<p>"I've got a busy house but I enjoy moments of privacy, when everyone is out."</p> <p>Ataka, 25-34, London</p>



#3

**PRIVACY IS A
PHYSICAL
AND MENTAL SPACE.**

FROM ...
Privacy as a
physical place

TO ...
Privacy as a mental
and physical space



MEET Y. WANG

She works in finance in **Shanghai**, where she lives with her daughter and husband.

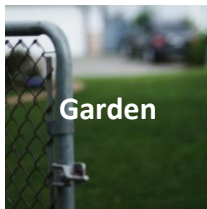
She **uses her private moments to relax** after work and feels most private when she is **immersed in something, whether that's a film or simply her thoughts**.

When she wants to create a private moment at home, she sits in **'her spot' on the sofa and puts a film on the TV**. When her husband comes home from work, **he knows to give her space** and let her start talking to him when she's ready.

“ Everyone's house is a different size, but we can all find our place in it. My daughter can play in the living room, and my husband can play games or watch TV in the bedroom. **Each of us actually has our own space in this house.”**

#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

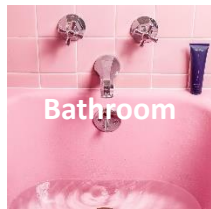
Privacy can happen in many spaces and places, in and out of home



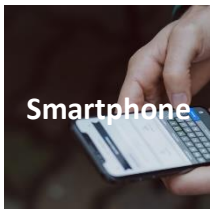
Garden



Laptop



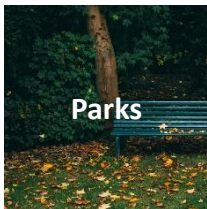
Bathroom



Smartphone



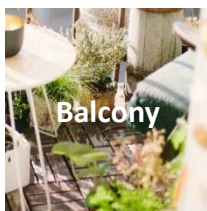
Kitchen



Parks

“In this house, I **have my own corner**. I always call it, like, Sarah's Corner or My Corner. Because there are three generations living in one house.”

Sarah, 25-34, Amsterdam



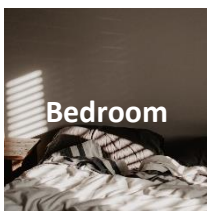
Balcony

“I find privacy in nature. Even when there's people around, when you're in nature spaces **everyone takes their mask off** in a way. When I'm walking at Wildcat Canyon literally everyone will say hello to me, or say hello to each other because finally **we just get to just be.**”

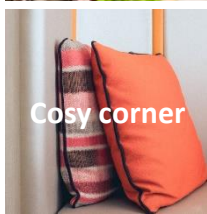
Mecca, 18-24, San Francisco



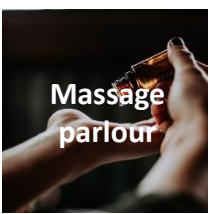
Public transport



Bedroom



Cosy corner



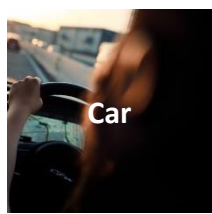
Massage parlour



Coffee shops



Shopping malls



Car

WHERE DO YOU CURRENTLY GET PRIVACY FROM THE MOST?

Places out of home offer the opportunity for privacy

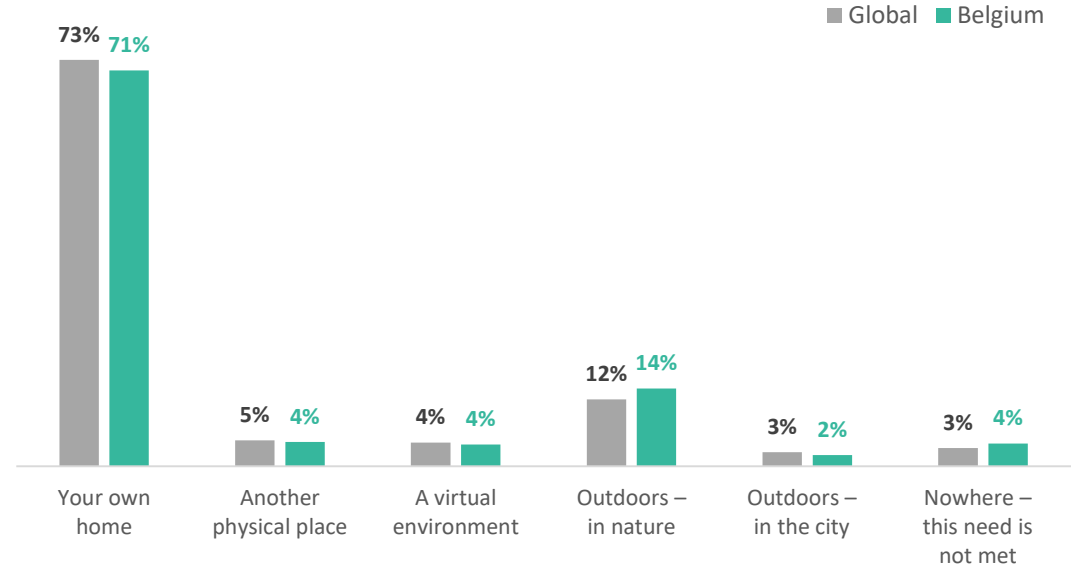
Our vehicles act like mental and physical ‘bubbles’ keeping the outside world, out.

It is a space that offers **safety** from the outside world as well as an environment you can **curate and control** – for example, the choice of music or radio station.

Nature allows us to grab moments of anonymity and alone time.

The **expansiveness of natural spaces** is a welcome contrast to the four walls of home, particularly for those living in cramped, busy households.

Activities such as **gardening or going for walks** help us disconnect from the day-to-day and connect with nature.



#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

It is not only about how much space you have, but how much control you have over that space

Space can play a part in achieving privacy but **ultimately, the context we live in** plays a bigger role.

The people we live with, and the relationships we have with them, are a bigger barrier to our privacy at home than the amount of space we have.

The more people we live with and the more distant our relationship, such as living with strangers, the **less control we feel we have over that space.** This control impacts how easy it is to achieve privacy at home, as well as the other emotional needs of home (see Chapter 5).



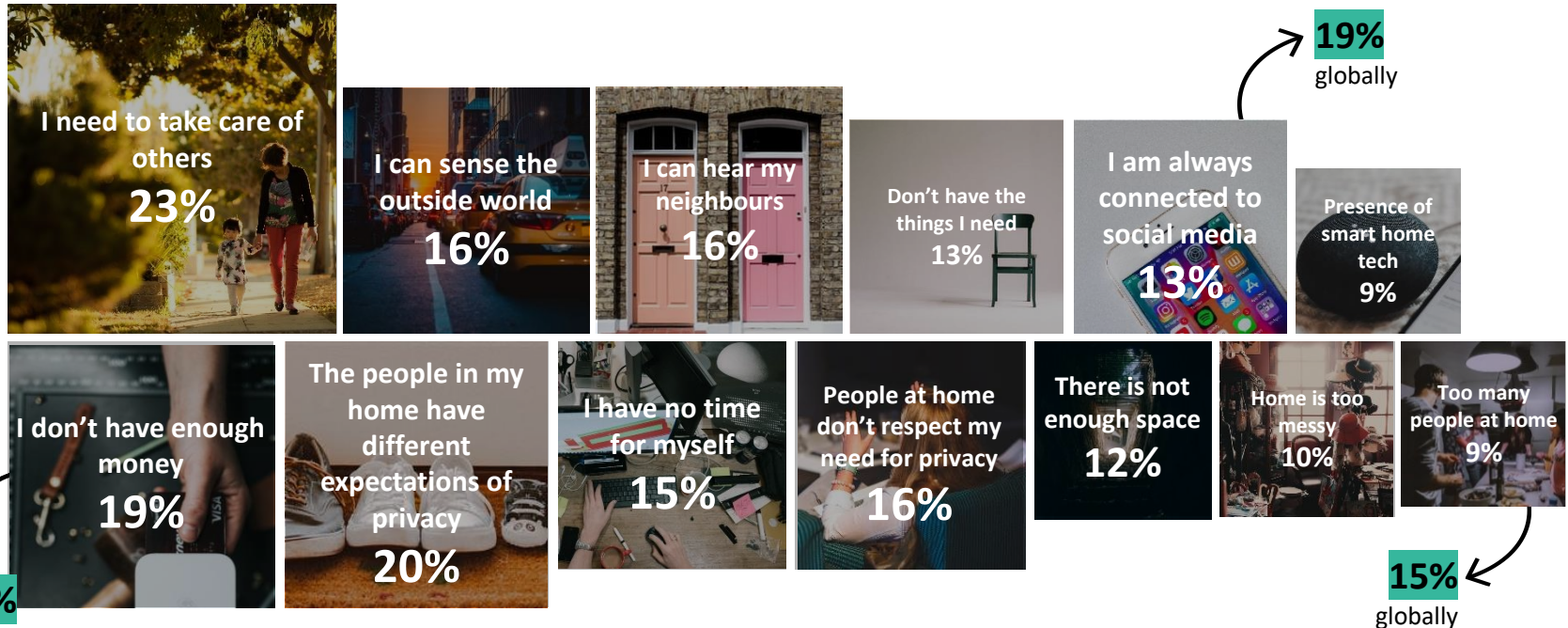
77%

In Belgium agree the size of home doesn't impact the privacy I can achieve

vs. 23% who say living in a larger home would allow me to achieve more privacy.

#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

The **needs of others, time and money** are bigger barriers to privacy than the size of home

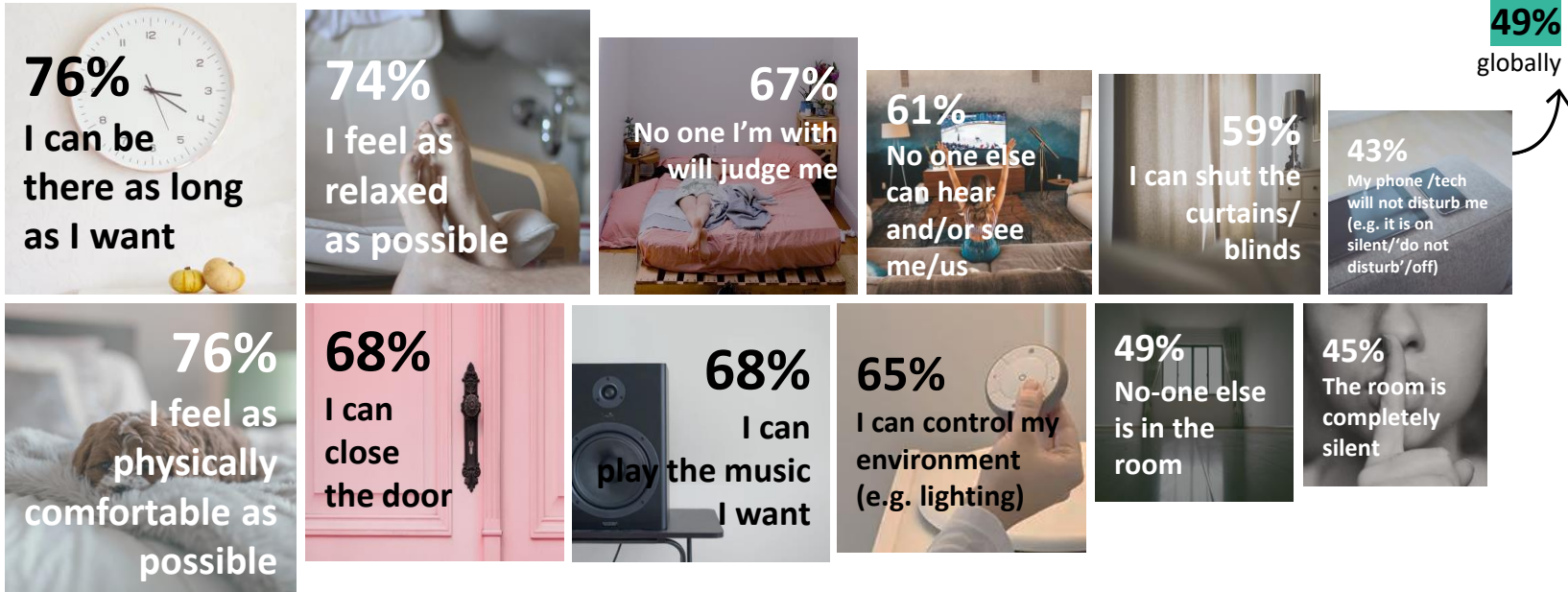


24%
Urbanites

Q18 What gets in your way of achieving privacy at home, if anything? | Global n = 33500; Belgium n = 1000 (% based on those applicable)

#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

Feeling in control of our environment is important to achieving privacy at home



#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

When we feel control over our spaces at home we use them to enhance our privacy

No space is inherently private.

The feeling of privacy is something we make a conscious effort to **achieve and protect at home**.

Having **more control** over our spaces gives us the power to change and adapt them to **feel more or less private**.

We make our space more secure by locking the doors and closing the blinds.

“I love closing the door behind me and knowing that I have complete privacy. I feel completely free to be myself and able to fully relax.”

Nicky, 25-34, London

We make our space reflect the mood by lighting candles and turning on music.

“[In my room] it’s quiet. The light colour is soothing. The curtains are cool. The mattresses are well-stuffed and covered with a clean white bed sheet.”

Pinakin, 35-44, Mumbai

We make our space feel comfortable by getting out a blanket or indulging in food and drink.

“The welcoming smell of hot coffee and freshly baked bread helps me relax and switch off from external distractions.”

Dave, 35-44, London

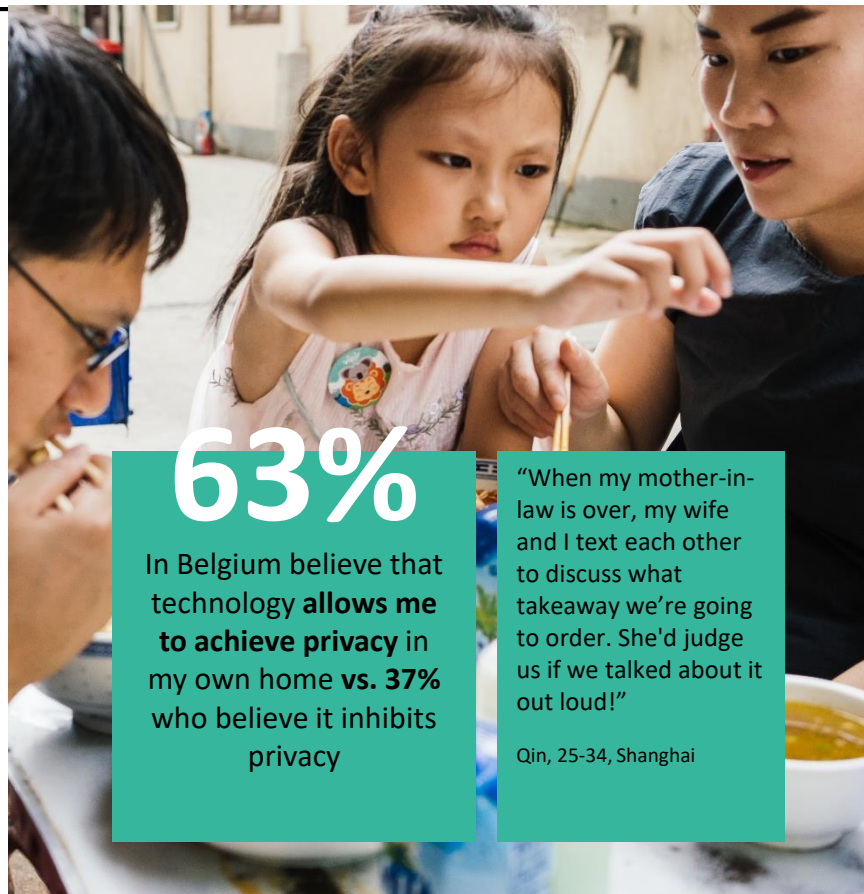
#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

For most of us, our tech is an enabler of privacy at home

Despite concerns that our tech creates an ‘always on’ mentality, in reality we feel in control of when it helps and hinders our privacy.

Tech as a confidant. Messaging and social media can help people escape into a private state of mind. Smart phones and tablets allow intimate conversations without others intruding.

Tech as a babysitter. Privacy-deprived parents use technology as a distraction for their children. By giving over an iPad, TV or phone it can give parents a well-deserved break.



63%

In Belgium believe that technology allows me to achieve privacy in my own home vs. 37% who believe it inhibits privacy

“When my mother-in-law is over, my wife and I text each other to discuss what takeaway we’re going to order. She’d judge us if we talked about it out loud!”

Qin, 25-34, Shanghai

#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

Feeling in control of tech limits the negative impact on our privacy at home

Tech as an intruder.

When we feel too reliant on technology, particularly phones, it creates an **'always on'** mentality.

This makes it harder to achieve, and maintain, a private state of mind for the **fear of an unwanted text**, email or call.

When we don't want our tech to disturb us we have **hacks**, such as selecting airplane mode or putting the phone in the other room, to **limit the impact our tech has on our privacy at home**.

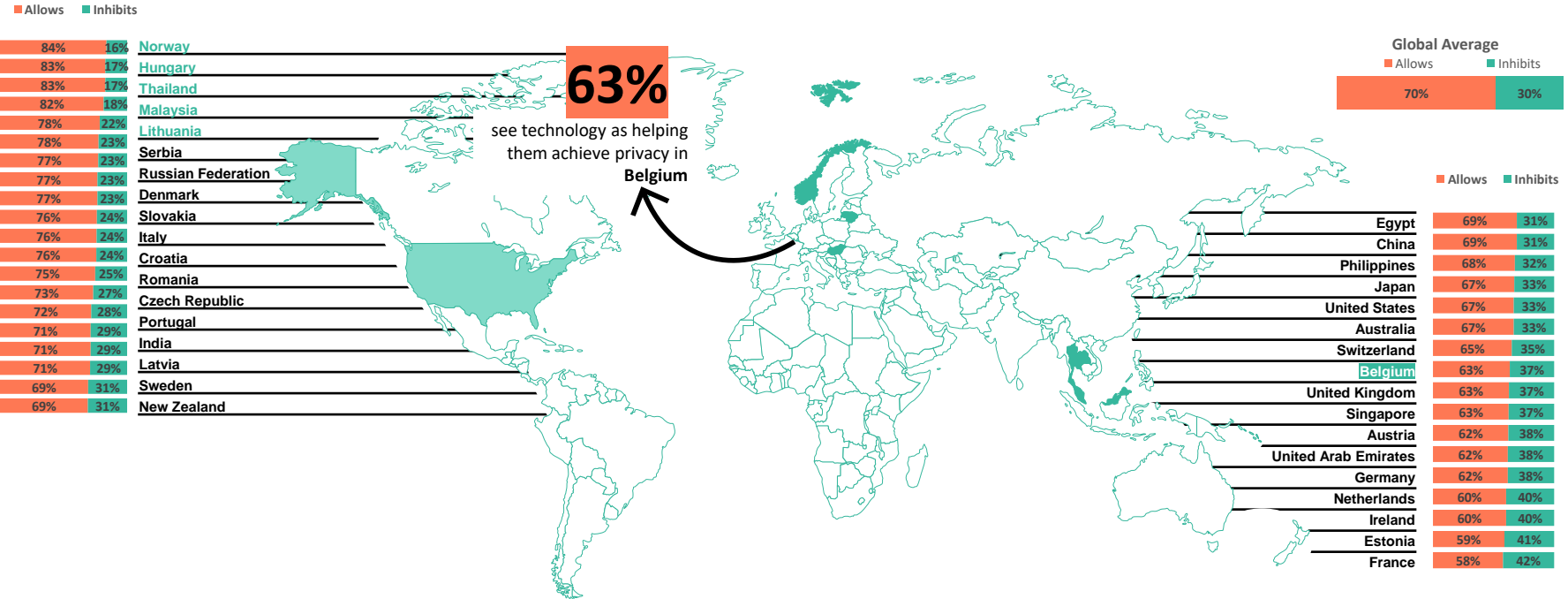


43%

In Belgium think **turning our tech on silent, off or do not disturb** is important to achieve privacy, vs. 49% globally

#3: PRIVACY IS A PHYSICAL AND MENTAL SPACE

Technology is an enabler of privacy for most of us



Q20 Which of the following do you agree with more? Q20_E "Technology allows me to find privacy in my own home" vs "Technology inhibits me to achieve privacy in my own home" | Global n = 33500; Belgium n = 1000

04

COMMUNICATING PRIVACY

Privacy: A complicated ask

PRIVACY SIGNALS

What did we learn? We know privacy is important, but we don't always ask for it outright.

There can be a **stigma around asking for privacy**. Asking can feel awkward, antisocial, and sometimes just downright rude, because we don't want others to feel like we don't value time with them.

If we can't ask verbally, we use a **signals to communicate our need for privacy**. We use our things, activities, or body language. We might put on headphones, or go to 'study'. Using signals means we rely on those we live with to understand them. The **better our relationships**, the more likely our privacy signals will be understood, respected, and successful.

While we learnt that some signals are **more effective than others**, **nothing beats asking outright**.

9%

In Belgium **don't feel we have the right to ask for privacy at home**

56

“ I tell my boyfriend **I’m just going to go have some me time** and have a bath.

Whereas previously I would just **hide away** from flat mates which made me **feel guilty** and probably made them think I was **rude**.

”

NICKY, 25-34, LONDON

19%

in Belgium are afraid people will take it personally when asking for privacy

PRIVACY STIGMA

Navigating privacy with those we live with isn't always easy

It's not just about 'my' private time, but theirs and ours. We have to coordinate when we want privacy and when others want it.

20%

in Belgium say people in their homes **have different expectations** of privacy vs. 22% globally.

It can be hard to fully control when a space is for me or for us. Spaces within the home have to adapt to everyone's privacy needs.

7%

in Belgium say they are **not allowed to ask for privacy** at home vs. 9% globally



PRIVACY STIGMA

Young people find it more difficult to ask for privacy verbally than others

19%

of **YOUNG PEOPLE (18-24)** find it hard to ask vs. 9% of those **aged 55+**.

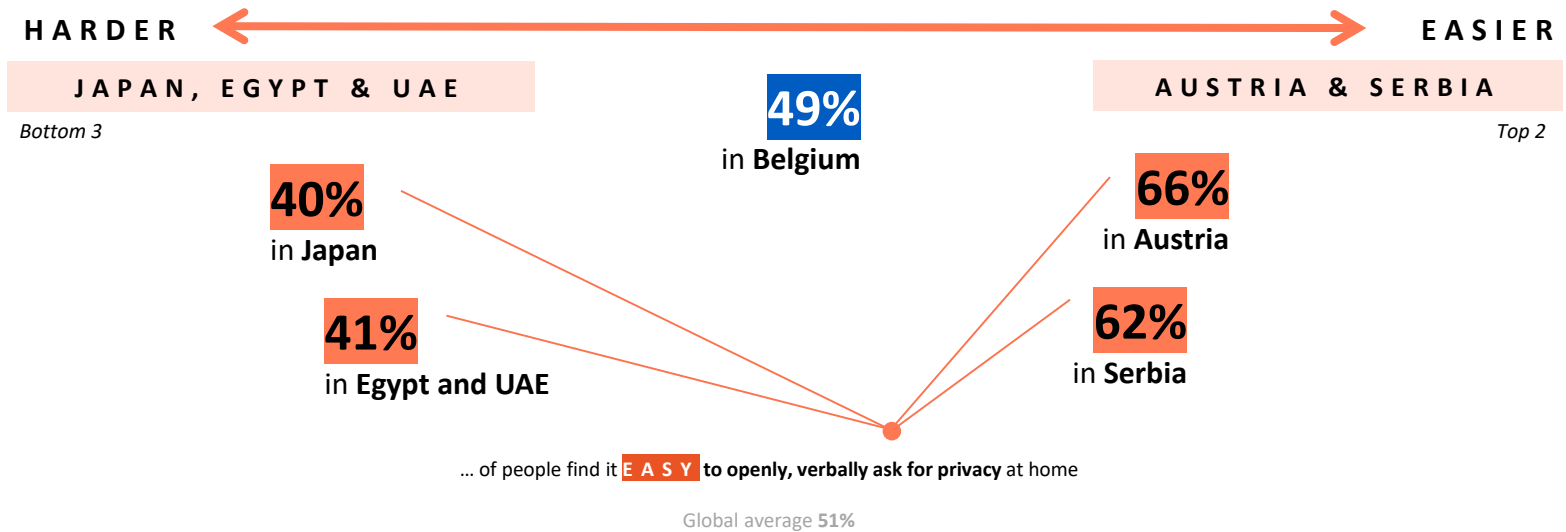
Younger people are more likely to use things such as headphones, or seek solitude in a specific room, when needing privacy, compared to those **aged 24+**.

They are also the group that are **more likely to experience awkwardness (44%)** when they do not achieve privacy, compared to young people globally (33%).



PRIVACY STIGMA

Culture also impacts how comfortable we feel verbally asking for privacy



PRIVACY AND WELLBEING

Feeling that we can't ask for privacy negatively impacts our wellbeing

For all of us, not getting the privacy we need has **negative consequences on our wellbeing**. This is felt most strongly by the groups that **struggle to ask**.

61%

In Belgium feel frustrated when they don't achieve privacy. This drops to **57% for men** vs. **65% for women**.

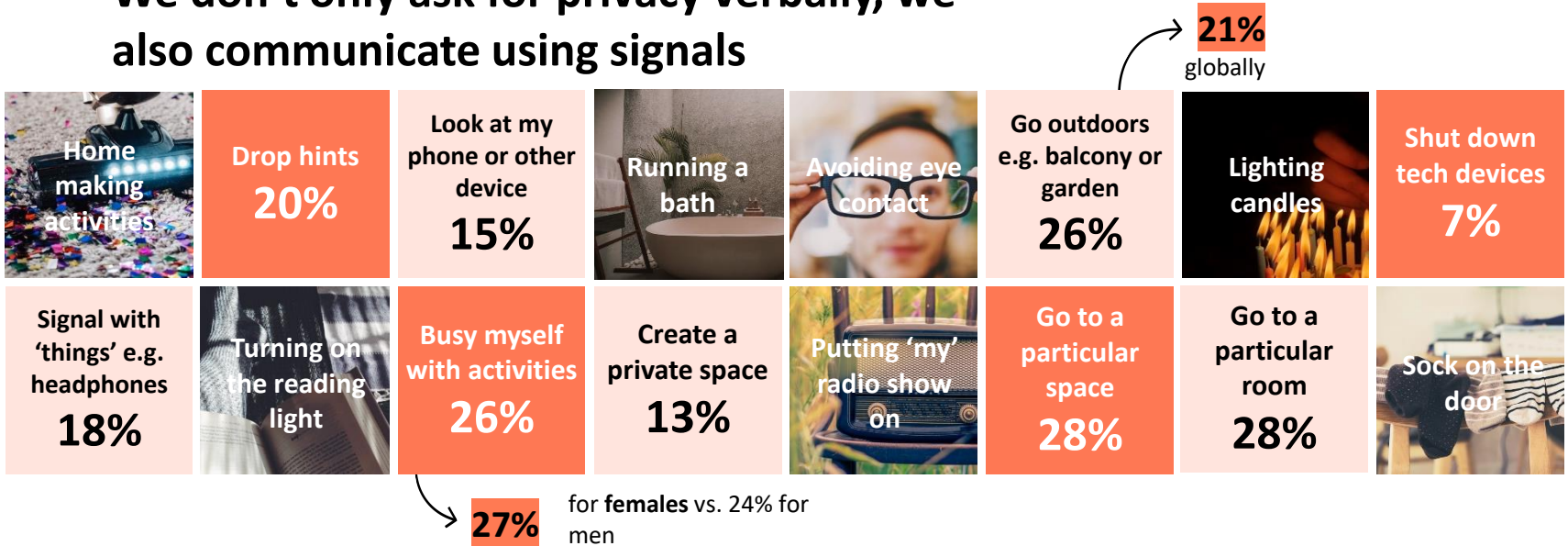
33%

In Belgium feel anxiety when they don't achieve privacy.



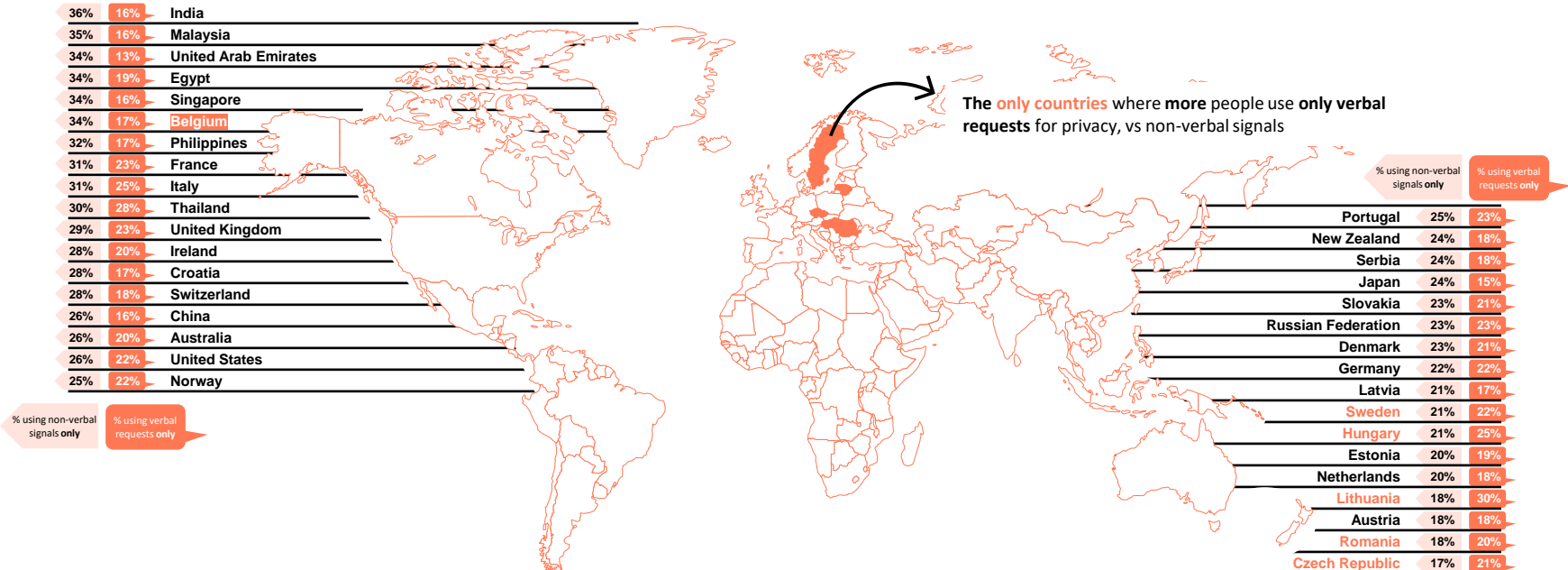
PRIVACY SIGNALS

We don't only ask for privacy verbally, we also communicate using signals



PRIVACY STIGMA

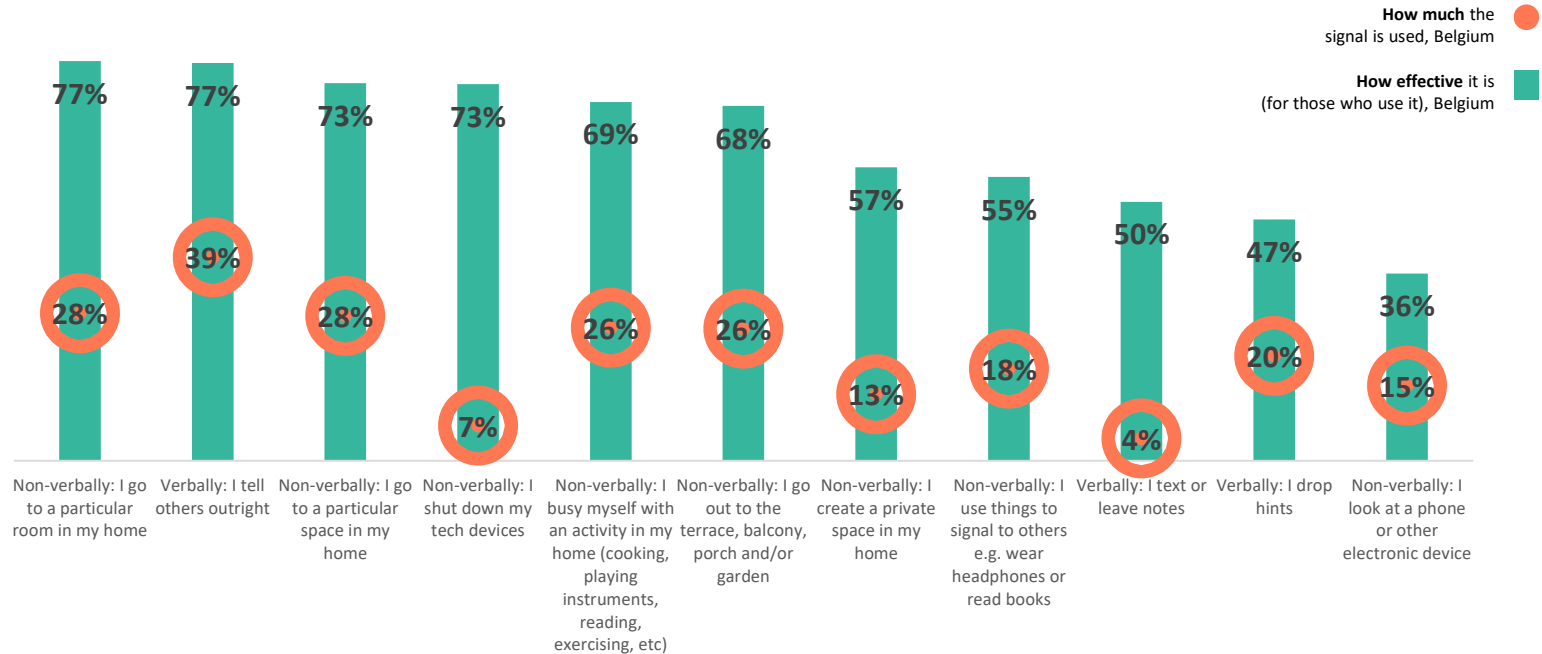
In most countries, more people ask for privacy with non-verbal requests rather than ask outright



Q16 How do you tend to ask others for privacy in your own home? | Global n = 24163 (all who signal for privacy at home)

EFFICACY OF PRIVACY SIGNALS

Some signals are more effective than others



Q16 How do you tend to ask others for privacy in your own home & Q17 How effective do you find these techniques when asking others for privacy in your own home? | Belgium n = 646 (all who signal for privacy at home)

PRIVACY SIGNALS

Our signals can vary depending on what type of privacy we want

SOLITUDE

Signals that create physical barriers.

Closing doors, closing curtains, running the bath...

Because we need to close ourselves off from others and the outside world to feel private and alone.

“It’s great to be able to go to a different floor and **put some physical space between others.**”

Dave, 35-44, London

INTIMACY

Signals that create space for just us.

Messaging, watching ‘our’ TV show, drinking tea/coffee, playing games...

Because we need to be able to do things, and say things, without feeling judged by others.

“Whenever I get my so-called me-time I prefer not to spend it alone but **with my child playing games.**”

Abbas, 25-34, Mumbai

RESERVE

Signals that create mental barriers.

Putting on headphones, listening to music or an audiobook, YouTube...

Because although we are physically in the room with others, our mind can be focused on something else.

“The only way to relax is to exclude noise from my surroundings and **focus on one thing, like an audiobook.**”

Iris, 25-34, Amsterdam

PRIVACY AND BELONGING

The more we belong at home, the more we understand others' privacy signals

Actively engaging and investing in our relationships at home will not only have a positive impact on our belonging, but also **our ability to achieve privacy**.

Having **respect** for the people we live with is crucial for building a **home where everyone can feel private**. This becomes more important the more people you live with.



87%

of those in the Belgium who feel they “belong” in their own homes also **feel most private at home**

“He gives me space whenever I need it. If I am not in the mood to talk I would tell him and he wouldn't disturb me. We have that level of understanding and respect each others privacy.”

Rimple, 25 - 34, Mumbai



MEET MECCA

Mecca is a **photographer living in Richmond, California** with her housemate, Ela, in a two-bedroom house.

She **grew up as an only child, so is used to having time alone**. As an adult, her private time is spent journaling, charging her crystals and in-shower meditations.

She **knows the importance of voicing your needs**. For her, if you don't prioritise yourself and ask for privacy you suffer from overstimulation.

“ I used to be that person that couldn't ask for privacy. But **now, I'm transparent about it**. I'm going to say it in a loving way. But when I want my private time, I want my private time. **People need to take more control** over their lives and **set realistic boundaries** for themselves.”

PRIVACY AND BELONGING

Time alone makes us better together

It might sound strange, but just as a better relationship at home is vital for our privacy, **our privacy is vital for our social lives.**

The time we spend alone – relaxing, focusing, and doing the activities we love – will **help us build stronger relationships** with each other. It is by acknowledging and empowering ourselves to establish privacy that we can start to build and nurture our relationships.

Empowering people to talk about it, ask for it, give it, and receive it will help us, individually *and* together.



“Although I have a good relationship with my lover, we both need individual space. I need privacy which cannot be disturbed, so quiet moments when I feel I am the only one in the world.”

Aibo, 25–34, Shanghai

44%

In Belgium believe privacy is important for **improving their relationships**, vs. 59% globally

05

BENEFIT OF PRIVACY

**Privacy: to thrive at
home, and in life**

THE POWER OF PRIVACY

What did we learn? The benefits of privacy are essential to thriving, both at home and in life.

We know that privacy is important, but **not equally accessible**. On top of that we know it can be **hard to ask for it**, and that some ways of asking are **more effective than others**.

We cannot underestimate the **role and value of privacy in our homes and in our lives**, given that at its very heart it is **always about truly being yourself**.

The power of privacy to **positively impact our wellbeing and personal growth** means having it creates not only a better everyday life at home, but a **better everyday life**.

68%

In Belgium agree that **privacy is important part of my wellbeing.**

70

RULES OF SOCIETY

Our cities and societies make us feel we have to act in a certain way

Daily life can sometimes make us feel like we have to perform, where we wear 'masks' and play roles in front of others to seek approval.

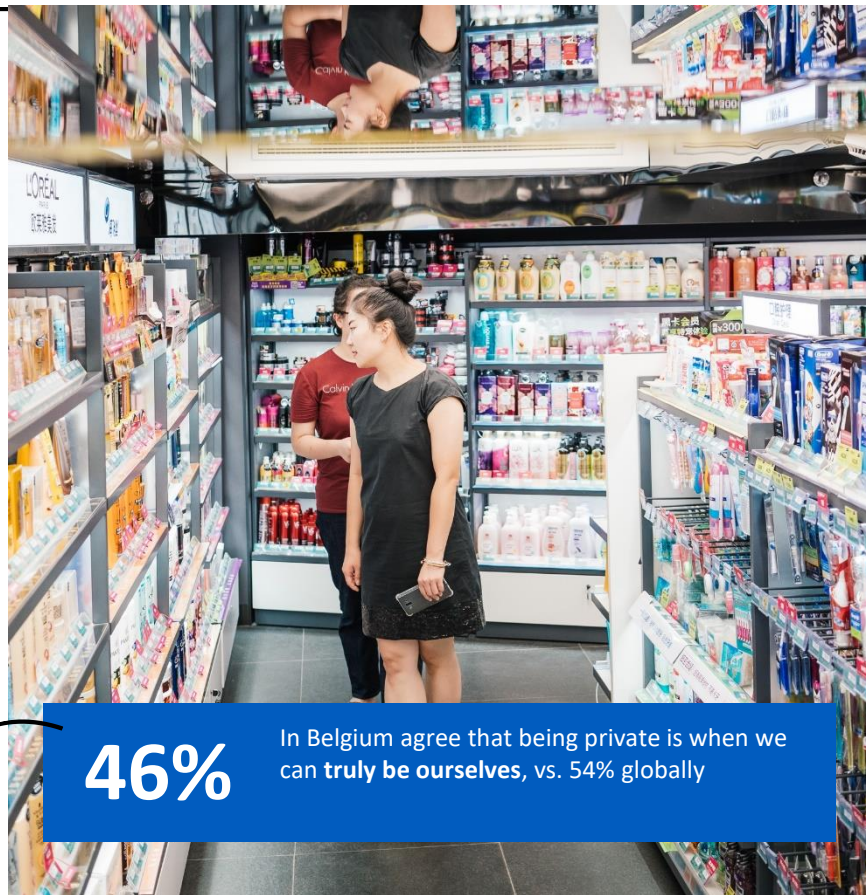
This isn't all bad and doesn't always feel restrictive, but it does sometimes mean that we're **not being our true selves for fear of being judged**.

40%

with those aged 18-24

46%

In Belgium agree that being private is when we can **truly be ourselves**, vs. 54% globally



RULES OF SOCIETY

The pressure to act a certain way *feels* the same, but the 'rules of society' look different

CHINA

Shanghai & Chengdu

There is a pressure amongst friends and family to be **open with one another**, and not to keep secrets.

Government surveillance of digital and physical spaces is accepted norm.

INDIA

Hyderabad & Mumbai

A **friendly and open culture** means socialising with strangers and neighbours is the norm.

Cultures and tradition exist around what life at home should look like e.g. multi-gen households.

NETHERLANDS

Amsterdam

It is common for homes to have **big windows**.

People often don't close curtains or blinds as having strangers looking in the home **doesn't feel like an invasion of privacy**.

UK

London

Culturally **over-polite and conscientious** in public.

In London **unspoken rules exist**, for example, you don't talk to strangers in public, or make eye contact on public transport.

USA

San Fran & NYC

Big cities are **melting pots of different cultures**.

Being friendly and talkative with strangers in public is normal, but equally **being respectful of others' need** for privacy.

POWER OF PRIVACY

We need privacy so we can play by our own rules

When we are private, we **don't feel judged**.

Home allows you to escape the 'rules' of society and makes you **feel free to act and think** however you want. This can be a moment of silliness singing in the shower, playing make-believe with your children, or simply smelling your socks.

Without the home providing this we would **feel exposed**, like intimate details of our lives are available for the world to see.

It is privacy that makes home a space to not only be by yourself, but be and feel yourself.



68%

In Belgium regularly seek privacy to enjoy **freedom from judgment**

"I love to drive in my own environment, alone with *my music*, and *my thoughts*. If someone calls me I can see who it is and decide whether to take the call or respond later."

Judith, 65+, NYC



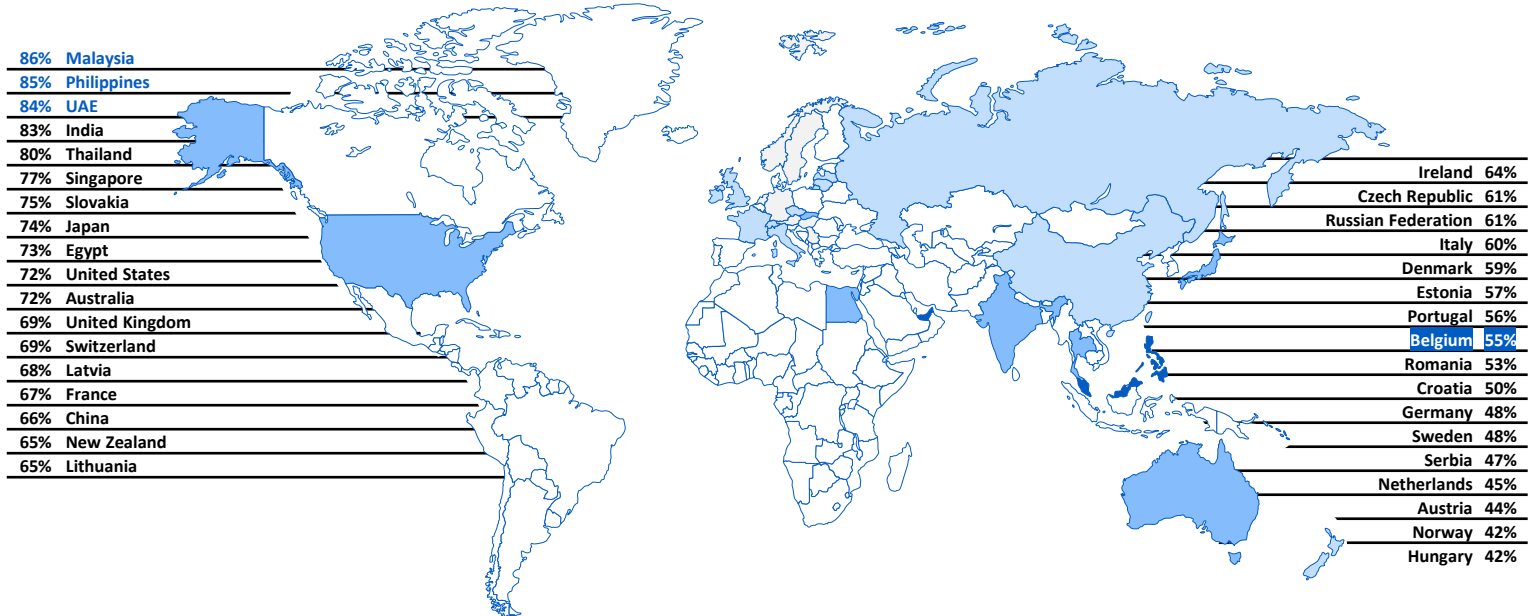
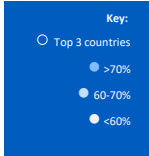
“ You don’t want people watching you dancing wildly in your living room. Nor having your spouse read your text messages. Sure, it’s not illegal... **but would you do it if you knew someone was watching you?** ”

DEEPA, 25-34, MUMBAI

POWER OF PRIVACY

Many seek privacy for freedom from judgment

Seeking privacy for freedom from judgment at least once a month



MEET SARAH

Sarah is a mother living in Amsterdam with her **husband, toddler, and in-laws**.

When moving in with her in-laws, she and her husband knew that **life would feel busier and the home would feel more cramped**.

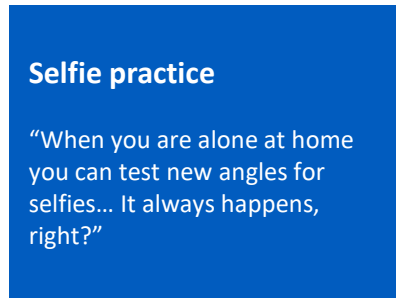
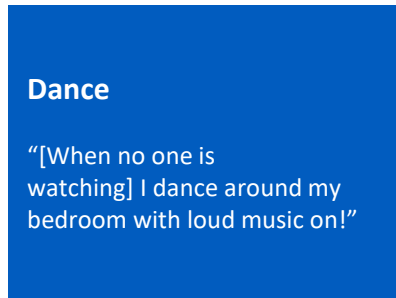
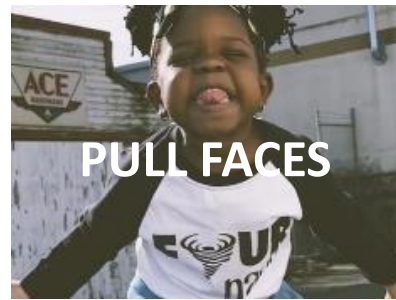
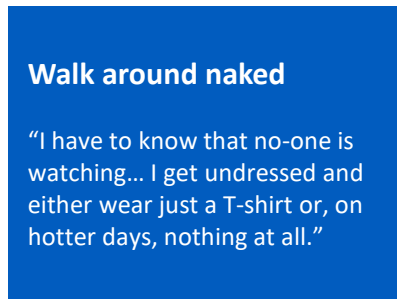
She needed to find a dedicated time and space for moments of privacy, so they **created her 'corner'**, where she can **read, play piano, paint her nails, and pray**.

“ As a woman, I am a **daughter** to my father and father-in-law, I'm a **wife** to my husband, I'm a **mother** to my child. I'm also a **friend** to my friends and **colleague** to my colleagues. My private moment is **the moment where I can be myself**.”



POWER OF PRIVACY

Life at home is when you live by your own rules



PRIVACY AND WORKING FROM HOME

Home as a space where we don't feel judged makes it a compelling alternative to an office

For many, the privacy of home makes for a better working environment, **particularly in India and China** where offices can feel strict and oppressive.

Privacy enables:

Deep Work Work that requires single-minded focus, keeping interruptions to a minimum.

Creative Work Work that needs a more relaxed informal environment, leisurely pace.

HOME COMFORTS

No-one judging your appearance.

"I don't have to get dressed, I don't have to shave. There is a sufficient degree of privacy."

Frank, 55-64, Amsterdam

STRESS-LESS WORK.

No-one judging your performance.

"[In the office] there is always the feeling of being monitored. At home it is more casual and quiet so it feels more efficient."

Lei, 25-34, Shanghai

MY WORK, MY WAY.

No-one telling you to work a certain way.

"In the office, there is a set of rules to follow, there are frequent observation by superiors about our movements which makes me feel like a caged bird. At home, we set our own rules."

Yogesh, 35-44, Hyderabad

“ [Without privacy] there would be no space to provoke new thoughts and ideas. It would brutally kill all my creativity and passion.

All our self-motivation and enthusiasm would dwindle down to zero.

”

RINKAL, 25-34, MUMBAI



POWER OF PRIVACY

We need privacy to grow and develop

Being free from interruptions and distractions means privacy enables us to **get things done**.

This gives us the time and space to think things through, and allows us to **achieve, accomplish and make decisions** that need to be made.

Without the home giving us this we would struggle to feel as though we are **moving forward and developing**, insecure that we aren't making the right decisions.

Privacy enables home to be a space where we grow as individuals and as a family.



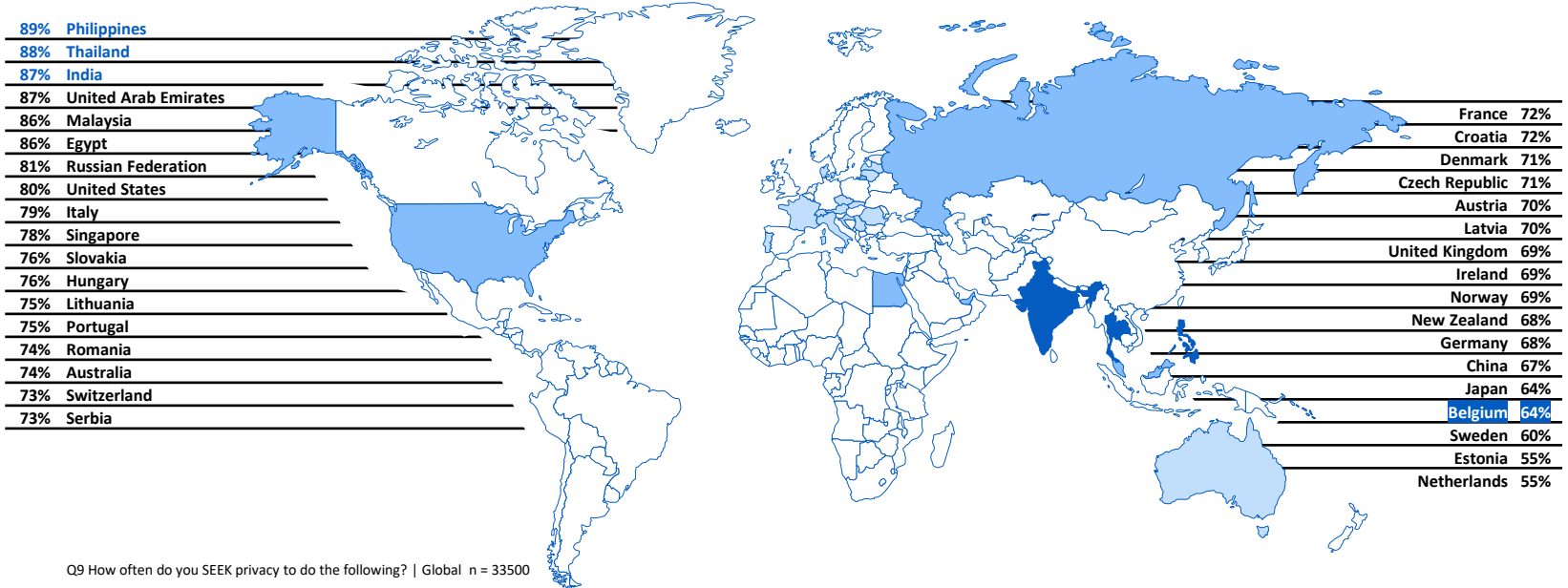
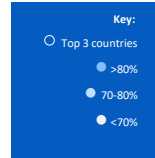
64%

In Belgium say privacy is important for **time and space for activities that enable personal growth**

POWER OF PRIVACY

The majority seek privacy for personal growth

Seeking privacy for personal growth at least once a month



Q9 How often do you SEEK privacy to do the following? | Global n = 33500

POWER OF PRIVACY

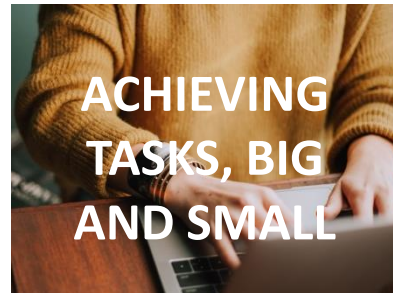
Privacy at home enables you to do – and be - better every day



LIFE ADMIN

“Recently I lost two people very close to me. My wife and I talk about them, it is a private moment shared by both of us.”

Faruck, 45–54, London



**ACHIEVING
TASKS, BIG
AND SMALL**

“My husband and I need to be private when we make important decisions for the family, like moving house or schools for the kids.”

Sherry, 25–34, Mumbai

“Finding a private moment helps me focus on what to do next. Somehow you don't feel so nervous anymore.”

Xiaowu, 25–34, Chengdu




**PROCESS
MOURNING**

“I was browsing emails. I don't mind being around others but being private gives me a sense of peace, like I've achieved something.”

Marino, 25–34, NYC



**MAKING
IMPORTANT
DECISIONS**



“ In a world without privacy, I wouldn't have a relationship with myself because of the demands others would put on me... **Privacy is my right** because I need to be with myself and find what I love before I can love others.

”

RANDY, 65+, NEW YORK CITY

PRIVACY AND THE OTHER NEEDS OF HOME

Beyond belonging, the more we fulfil the other needs of home the easier it is to achieve privacy

COMFORT

Without comfort we feel emotionally and physically insecure at home. Not being able to relax means achieving a private state of mind becomes difficult.



76%

in Belgium say **feeling as physically comfortable as possible** is important to achieving privacy at home vs. 78% globally.

SECURITY

Without security we feel watched and unsafe in our homes. The threat of someone unwanted being able to enter, hear, or see us, affects how much our home is a space for privacy and intimacy.

OWNERSHIP

Without ownership we feel it's harder to establish and control 'my' space within the home, whether a bedside table or a room. Having less autonomy means risking interruption or disturbance.



65%

in Belgium say **controlling my environment e.g. lighting** is important to achieving privacy at home vs. 68% globally.

POWER OF PRIVACY

Privacy has the power to unlock positive emotions

Achieving privacy, in the home or outside of it, has a positive impact on how we feel.

77%

feel **calmness** when they achieve privacy

60%

feel **satisfaction** when they achieve privacy.

33%

feel **joy** when they achieve privacy.



POWER OF PRIVACY

Ultimately privacy helps us thrive at home and in life

Privacy has the **power to impact our lives at home, our relationships, and our day-to-day.**

Whether alone or together, low or high energy, privacy gives us so much more than what appears on the surface.

Creating homes where **privacy is equally accessible** has the **power to unlock wellbeing by enabling personal growth and providing a vital sense of freedom from judgement.**



68%

In Belgium agree that
**Privacy is important
for my wellbeing**

THE POWER OF PRIVACY

We need to close the privacy gap by putting it in the spotlight.

By reframing how we think about privacy, we recognise our right for it, feel empowered to ask for it, and create the right space for it.

By embracing the **power of privacy** and the positive impact on our **mental and physical wellbeing**, we can **thrive** in our everyday life, both in and out of home.