



A Slice of **MODERN** Life

Five Years

2015-2020

Brought to you by Hello Alfred

A Letter from Our Co-Founders

Five years ago, we built Hello Alfred to make trusted, personal help as available and accessible in the home as heat, water, or power. By inviting people to ask for the help they need — and to receive it — we've been able to return invaluable hours and headspace to our members.

Over the course of completing millions of tasks and returning years' worth of time, we started to notice how much our lives were changing year after year. As one of the only companies in the world that's welcomed into the homes of our members week after week, month after month, we're privileged to witness how innovation and advancement make their way into your daily routine.

We're with you when you move, when you get engaged, when you change jobs, when you adopt a dog, when you have a baby, when you retire — during all the junctures

when you experience a personal change. But at the same time, the world outside is undergoing its own evolution and we wanted to take a closer look at how that impacts us, too.

So we turned to you. Nearly 2,200 respondents across the country took 30 minutes to reflect on how their lives have shifted over the last five years. We took what you shared, sourced data points of our own, solicited predictions from industry experts, and combined them to produce this, our first glimpse into urban living today.

We hope that you find the result as illuminating, entertaining, and thought-provoking as we do. It has been an honor to join you these past five years and we can't wait to see what the next five (and beyond!) hold for us all.



Marcela Sapone

Marcela Sapone
Founder & CEO

Jessica Beck

Jessica Beck
Founder & COO

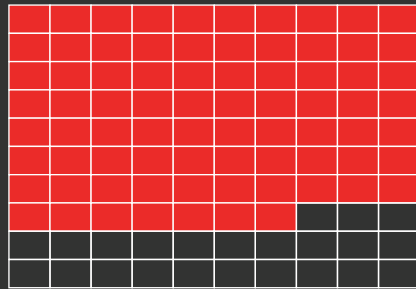
HOW WE FUNCTION

Time for a Change

From grocery subscriptions to apps that replace your car, there's no question we're operating differently now than we did five years ago.

The common denominator behind the majority of tech being pioneered today? Saving time. It's the one thing that we all want and never seem to have enough of, which is why so many up-and-coming startups are built upon unique ideas for how to conserve more of our precious minutes.

And it appears to be working.



77%

of us report saving time by making technology-based changes

WE'RE GETTING FROM POINT A TO POINT B IN NEW WAYS.

It started with paper maps in the glovebox. Then we graduated to MapQuest print-outs. Eventually, Garmin would launch its dashboard-mountable GPS, paving the way for the Apple Maps and rideshare apps we have on our phones today. The upshot?

- 23%** of us have ditched our cars in favor of rideshare services like Uber or Lyft
- 61%** of us think less about how we'll get around now than we did five years ago
- 51%** of us are more frequently eschewing a commute altogether and working from home



HOW WE FUNCTION

WE'RE SUBSCRIBING TO A NEW WAY OF SHOPPING.

Home delivery has been on the rise for quite some time, but subscription services are taking it to the next level. Ranging from groceries to pet care to the very clothes we wear, companies like Blue Apron, Rent the Runway, and Harry's have capitalized on the convenience of this model — and are seeing success:

24% of us have replaced a common chore with a subscription

49% of us have replaced in-store shopping

890% increase in subscription services since 2015

WE'RE STILL A WORK IN PROGRESS, THOUGH.

Despite the strides we've made to be more efficient, time is still a struggle.

85 Percentage of us committed to spending our time more intentionally

10 Average hours saved by Hello Alfred services per week

109 Average hours saved by tech-based services per year

And yet 58 percent of us still report having less free time and 67 percent harboring more stress now than we did five years ago, meaning the majority of us have miles to go if we're going to (finally!) get some quality sleep.

WHAT DOES THE FUTURE HOLD



"Life has completely changed over the past five years. Today, people rent everything. They 'borrow' music and entertainment via Spotify and Netflix. They take Ubers instead of own cars. They have a subscription to Blue Apron. From the very beginning, the inspiration for Rent the Runway was to create a similar model for fashion.

How life-changing would it be to have access to hundreds of thousands of designer pieces and be able to have a new outfit every single day? With the rise of

social media and public documentation of where we go, who we see, and what we wear, there's a very new kind of pressure to never wear anything twice — one that the majority of our closets and wallets can't support.

Convincing people that they should have a rotating closet of unlimited options they can wear to work, on the weekend, and at parties was once a tall order. Now that we've normalized it, I think we'll see even more industries capitalize on this idea of shared economics as a way to individuate."



GABBY ETROG COHEN
SVP, BRAND, COMMUNICATIONS
& BUSINESS DEVELOPMENT
RENT THE RUNWAY

ALFRED OBSERVATION

"
THE TECHNOLOGY YOU SEE IN PEOPLE'S HOMES CHANGES QUICKLY. BOTH THE ECHO DOT AND GOOGLE HOME CAME OUT IN 2016, BUT ALREADY IT'S RARE THAT A CLIENT DOESN'T HAVE ONE.
"

HOW WE EAT

Food for Thought

Whether we're trying to shave off a few pounds or pave the way to a healthier planet, one thing is clear: We are thinking about what we eat a *lot*.

And it makes sense. The more information we can access — about where our food comes from, the global ramifications of our food supply, and how personal diet contributes to physical and mental wellbeing — the harder it becomes to ignore the many layers of impact surrounding our habits.

92%

of us say we've become more thoughtful about our diets in the last five years



2015



2020

69%

of us think our food choices have a direct global impact

66%

of us think our food choices impact our local community

61%

of us wish we had more time to think about our eating habits

WE'RE IN IT TO WIN IT.

Sustainability is certainly a buzzword, but not only are we shaping our habits around the planet's longevity; we're also forming personal habits that we'll be able to stick with over time.

In fact, the top five growing food trends of the past five years all share two key commonalities: they're each healthy for the planet and healthy for humans.

①

VEGETABLE-BASED GRAINS LIKE CHICKPEA PASTA + CAULIFLOWER RICE

②

SPARKLING WATERS

③

SUPERFOODS LIKE CHIA SEEDS, FLAX, AND GOJI BERRIES

④

NUT BUTTERS LIKE ALMOND AND CASHEW

⑤

ALTERNATIVE OILS LIKE COCONUT AND AVOCADO

25%

of us have cut down on meat consumption

60%

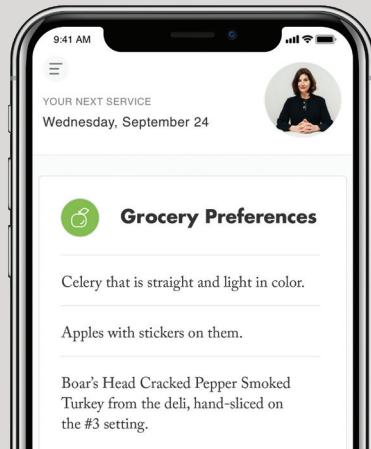
of us identify with lifestyle diets, limiting carbs or simply eating moderately, rather than subscribing to fad diets like intermittent fasting or ketogenics

81%

of us consider sustainability when making purchasing decisions

WE KNOW WHAT WE LIKE.

For all of our conscious considerations, taste and enjoyment still play a predominant role in our decision-making, leading the way in our ranking of food priorities — in fact, our Alfred Home Managers say we're getting more specific than ever with our grocery requests. Here are just a few of the quirkiest ones to come through our app:

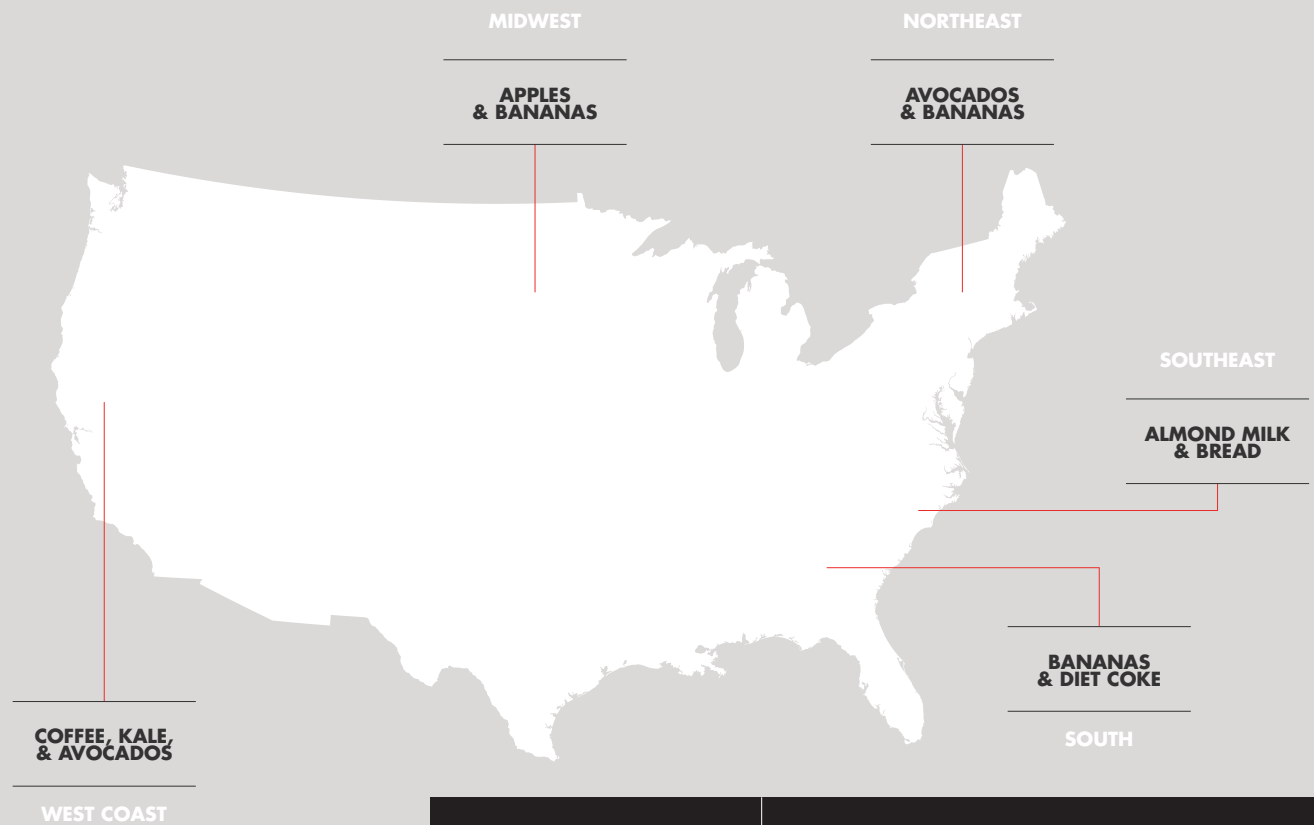


But no matter how niche we get with brands, flavors, and specialty ingredients, there are certain staples we can never seem to get enough of. Take a peek at our MVPs around the country: →

**ALFRED
OBSERVATION**

"
TRADER JOE'S IS BY FAR THE
FAN FAVORITE OF STORES —
EVERY SINGLE ONE OF MY
CLIENTS ALWAYS HAS AT LEAST
A FEW ITEMS ON THEIR LIST!
"

HOW



WHAT DOES THE FUTURE HOLD



"With the rise of big-box retailers, people have become accustomed to immediacy and direct-to-door service, but we've also become increasingly committed to the locavore movement and more intentional eating. As a result, we're going to see an influx in independent, hyper-local food solutions, everything from vertical farming to communal kitchens.

Economically, these businesses will save on the traditional material costs of preserving,

packaging, and shipping their products, which they can use to stay competitive against national brands.

Meanwhile, their location right there in the neighborhood will mimic and sate our ramping need for convenience. In the not-too-distant future, we may even see apartment buildings eschew in-unit kitchens in favor of 'resident chefs' who source and prepare food on demand."



JOHN STEVENSON
EXECUTIVE CHEF
KKR



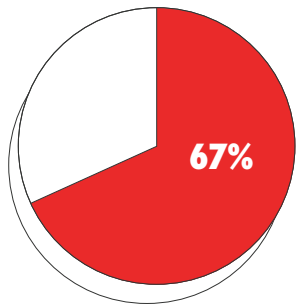
Screen Time

With more devices, more platforms, and more content to consume than ever before, the media landscape has changed dramatically. From the stage, to screens big and small, to the palms of our hands, we're able to access some form of entertainment nearly every second of every day, from every corner of the globe.

So how is all of this listening, watching, swiping, and tapping affecting us?

WE'RE SPENDING MORE TIME ON ENTERTAINMENT.

With so many outlets to choose from, it's no surprise we're logging more hours.



OF PEOPLE SAY THEY CONSUME MORE MEDIA NOW THAN THEY DID FIVE YEARS AGO

650

Hours of entertainment consumed every year

1295

Hours the average person spends using their smartphone every year

22%

Percentage of waking hours we spend on our phones

HOW WE

WE'RE CONNECTING IN NEW WAYS.

From relaxation to recreation, unplugging to connecting on social channels, how we like to spend our time away from our desks varies dramatically.

40% of us believe that entertainment is the primary way to connect with others...

WITH 37% going so far as to pick a specific travel destination in the name of the 'gram...

WHILE 84% of us prefer to use weekends to get away from it all...

AND 56% won't say no to binge-watching a full season of a show at once

ALFRED OBSERVATION

" IT USED TO BE THAT THE MORE DEVICES YOU HAD, THE BETTER. NOW IT'S THE OPPOSITE — WITH THE NEW SMART TV'S AND STREAMING DEVICES, LESS IS MORE. "

ENGAGE

WE'RE PLACING MORE VALUE IN EXPERIENCES.

For as much time as we spend in front of screens at work and home, a full 58 percent of us prioritize live entertainment. Here are the most up-and-coming forms of their kind:

#1 FOOD-FOCUSED EVENTS

Think farmers markets, Restaurant Week, or even permanent fixtures like food halls.

#2 MUSIC FESTIVALS

Annual events like Coachella, Bonnaroo, and Governors Ball have stolen the spotlight in recent years.

#3 POP-UPS

Blame it on our collective FOMO, but all it takes is a hint of impermanence to pack the house.

#4 ESCAPE ROOMS

From a mock CDC quarantine to a zombie apocalypse in San Diego, these IRL video games have taken off nationwide.

#5 SECRET CONCERTS

For those looking for a more exclusive or personal experience, last-minute and invite-only performances are gaining popularity.

HOW WE

WHAT DOES THE FUTURE HOLD



"Whereas five years ago festivals were all the rage, the music industry is starting to see a burst of that bubble. Ticket prices are getting higher, indie festivals are getting swallowed up by corporations, and the lineups and experiences are getting more and more similar. It's the best way for an artist to tour, because of the easy money, but they're also learning that it impairs their ability to form an authentic connection with their fans.

Artists will always want to differentiate, but if mainstream norms are the opposite of that — multi-stage festival lineups and an ephemeral scroll of songs in an app — then how do artists stand out? The answer: album release events, where they get to create spaces that they control and where they can express themselves for their communities.

Underplays — where artists elect to perform in smaller venues than their popularity could command — are also becoming more of a thing, with both artists and fans craving that intimate, sweaty experience. People want dinners, limited-edition merch drops, anything that is high-demand and hard to get into — in short, the opposite of the festival experience."



NATE AUERBACH
PARTNER
VERSUS CREATIVE FOR
GOLDENVOICE CONCERTS (COACHELLA,
STAGECOACH, CAMP FLOG GNAW)

HOW WE RELAX

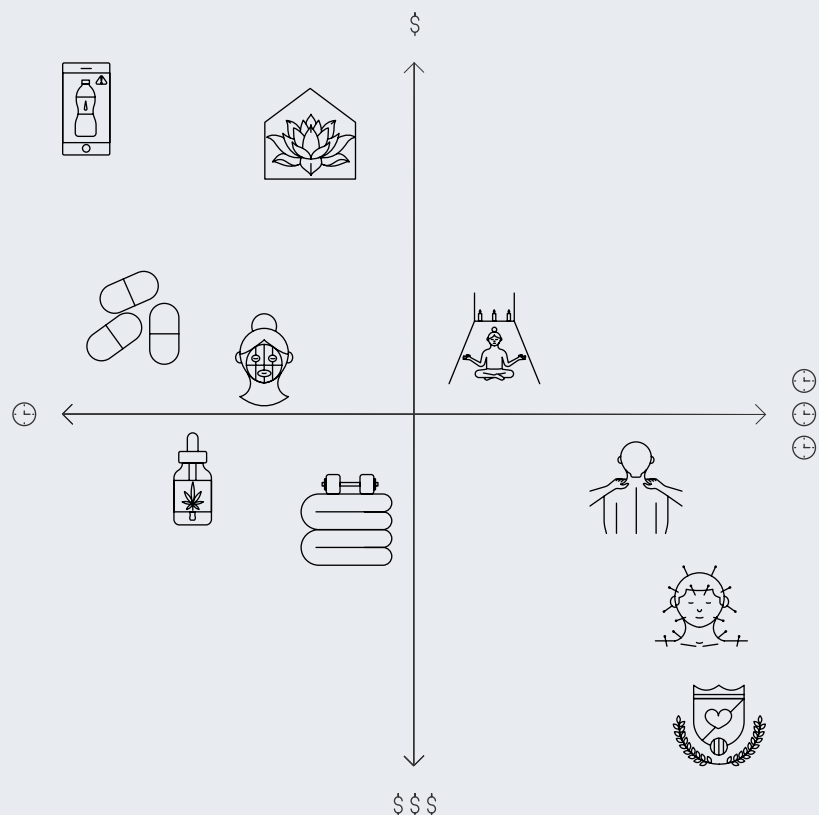
Alive & Well

Five years ago, we practiced self-care. We exercised. We got haircuts. We went to therapy. We took naps. So what exactly has changed?

The difference now is that we've given the category a name, a label for all these things we do as individuals to feel good about our lives and ourselves. For some of us, self-care starts with looking good. For others, it starts with feeling good. But ultimately, it comes down to our overall sense of wellness

and our willingness to invest in it. And the numbers show that we most definitely are — a full 60 percent of us have made at least one purchase in the name of self-care.

But what constitutes a worthy investment? We compared the average cost of various forms of self-care against the time commitment they require to help you decide which ones best fit into your routine and budget.



MASSAGE

From Swedish to Shiatsu, massage can reduce or relieve stress, pain, and tension. Targeting certain areas can even help with headaches and other site-specific irritations.



KOREAN SHEET MASKS

These single-use, serum-infused fabric masks give your skin an instant, concentrated dose of vitamins, aloe, lavender, green tea, and more.



SELF-CARE APPS

These represent a great way to hold yourself accountable for behaviors that are good for you — like staying hydrated, taking a moment to breathe, and eating mindfully.



WELLNESS CLUBS

There truly is a gym for everyone, whether you want to run and lift on your own or spin or practice yoga with a group. Some clubs even employ in-house nutritionists and personal trainers to help you really take your health to the next level.



AT-HOME MEDITATION

Breathe, reflect, and ruminate in the comfort and privacy of your own home using an app or other mindful meditation tool.



ACUPUNCTURE

People have relied on this practice of strategically placing pins on specific pressure points for thousands of years. The process is commonly used to relieve everything from stress and joint pain to immune and digestive issues.



NUTRITIONAL SUPPLEMENTS

Deficiency in any one of the hundreds of vitamins and minerals we need can throw off your health, sleep, and mood. Taking a supplement to augment your dietary intake can trigger an instant improvement.



IN-STUDIO MEDITATION

If you're new to the practice, a studio can provide guided sessions. These classes will teach you breathing techniques, chanting and intoning, and help you focus in on your senses and heartbeat.



CBD

Derived from hemp, CBD oils, edibles, and creams reduce stress, anxiety, insomnia, and other ailments. And because they don't contain THC, you'll receive all the benefits without experiencing any psychoactive effects.



WEIGHTED BLANKETS

Simulating the same feeling as a hug, these blankets gently compress your nervous system. This can help you sleep better, relieve restless leg syndrome, and generally cultivate a sense of calm.

HOW WE RELAX

WE'RE THINKING OUTSIDE OF OURSELVES.

Why is self-care so important? While the behavior itself may be individualized, our motivation for wellness clearly connects back to something greater.

65%

of us believe that how we take care of ourselves impacts the larger world

82%

of us are more willing to talk about mental health than we were five years ago

#1

App Store rank of the self-care category in 2018

ALFRED OBSERVATION

" I HAVE A HANDFUL OF CLIENTS WHO REGULARLY KEEP MORE VITAMINS IN THEIR KITCHENS THAN THEY DO FOOD! "

WHAT DOES THE FUTURE HOLD



"There's a reason that meditation is a multi-billion dollar industry, existing in countless forms from apps to brick-and-mortar studios in every major city. In a world that is moving faster and faster, and constantly marketing to us who we should be and what we should want, there's a palpable current of anxiety and dissatisfaction in our culture.

to be more present and to slow down. Fortunately, there are more outlets available to facilitate that now than ever. Even acknowledging that you're breathing — taking three or four conscious deep breaths, silently repeating "I am" with each inhale, "here now" with each exhale — will bring you back to yourself and the present moment."

I think we've reached a tipping point where we're looking for space in our lives



MEGAN MONAHAN
AUTHOR
"DON'T HATE, MEDITATE!"



HOW WE



SWEAT

Let's Get Physical

Nothing communicates how much public opinion of exercise has changed more than the rise of the “fitfluencer.” Not that long ago, working out was an unfortunate chore, a necessary evil; today, it’s the crux of an aspirational industry that has undergone not only exponential growth, but sparked a true social movement.

More a lifestyle than an activity, 80 percent of us go so far as to say we wish we had more time to focus on fitness. We post “sweaties” on Instagram (post-workout selfies, for the uninitiated), read class reviews online like we would restaurants or theater, and will spend more on a pair of leggings than we do our “real” clothes.

The most fascinating insight, though? We’re not doing all of this to score great abs or even better health.

We’re doing it because it makes us happy.

71%

of people claim exercise is an important part of their overall enjoyment

HOW WE

WE'RE WORKING FOR IT.

There's no question about it: we're putting in the hours and paying the (sometimes steep!) dues.

58% Percentage of us who believe that fitness is directly tied to achieving personal goals

6B Trips to the gym made annually in the United States

8K+ Fitness apps in existence

BUT WE'RE ALSO MAKING IT WORK FOR US.

From Insta-famous exercise apps like "Sweat with Kayla" to the fast-growing field of fitness tourism, a host of innovations are making it easier than ever to work your workouts into your daily life.

80% of us say that finding an approach that works for us is key

79% of us have tried a virtual personal trainer

76% of us have planned a trip inspired by a health goal



WHAT DOES THE FUTURE HOLD



"As the demand for personalized fitness increases, I think that we are going to see more clients turning to technology to give them easier access to expert trainers and personalized programs that can help them meet their goals. For context, the studio fitness industry is the fastest-growing segment of the \$25 billion US fitness market because of skyrocketing demand for quality classes and instruction. Yet despite the growth of studio fitness, two-thirds of Americans still work out in-home — sacrificing quality for convenience with clunky equipment, little-to-no instruction, and stale or outdated content. As technology increasingly enables us to create custom fitness solutions that are more easily accessible, traditional gyms will need to innovate in order to survive, and convenience, curation, and quality will be crucial elements for success."



BRYNN PUTNAM
FOUNDER AND CEO
MIRROR



ALFRED OBSERVATION

" AT LEAST 95 PERCENT OF MY CLIENTS EXERCISE IN SOME FORM AT HOME, WHETHER THEY KEEP FREE WEIGHTS IN THE CLOSET OR A PELOTON BIKE PARKED IN THEIR LIVING ROOM. "

SWEAT

HOW WE LIVE

No Place Like Home

What have we learned on the home front? We want less. Well, to be exact, we want fewer things, but better ones.

It's hardly a surprise: With more of us living in cities for longer and space at a premium, we're slimming down our material goods by volume, but expecting more from them. We want quality materials, intelligent design, sustainable makers, and — last, but far from least — a fair price.

But of everything you told us, the one thing we heard most overwhelmingly was that nearly everyone wants more time to make our homes into the havens we envision.

- 78%** of us wish we had more time to focus on our homes
- 47%** of us wish our homes better reflected us
- 70%** of us plan to stay put for at least another five years

ALFRED OBSERVATION

"A LOT OF MY CLIENTS WORK VERY LONG HOURS AND WHEN THEY COME HOME, WHAT THEY WANT MORE THAN ANYTHING IS A SANCTUARY WHERE THEY CAN SIMPLY UNPLUG AND RELAX."



WE'RE PICKY.

Fewer purchasing decisions definitely do not equate to less consideration.

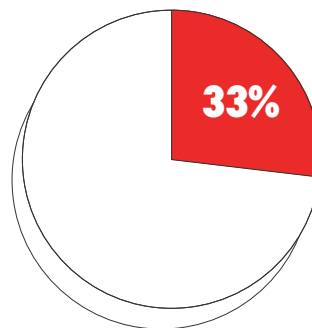
84% of us have searched



when making a purchase.

BUT WE'RE ALSO REALISTIC...

Only 33 percent of us believe that when we buy something, it should last the rest of our lives.



SO WHAT IS THE BEST, THEN?

Our Alfreds share the fan favorites they keep seeing behind every door.

- DISH SOAP** MRS. MEYERS
- VACUUM** DYSON, ROOMBA
- COFFEE MAKERS** NESPRESSO, KEURIG
- TRASH CANS** SIMPLEHUMAN
- CANDLES** DIPTYQUE, NEST

WHAT DOES THE FUTURE HOLD

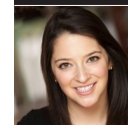


"For most of us, home is the foundation of daily life and represents an antidote to the stress of our lives. It's become a counterpoint to our busy world — a haven where we can reconnect with the important parts of our days that need time such as friends, family, hobbies, and rest.

But we've also heard that clutter and the stress of organization can inhibit our ability to foster enjoyment in the home, with 84% of Americans reporting feelings of stress surrounding home organization.

As our generation continues to accumulate excess and move more frequently, there is a growing need for unique, versatile, and responsibly-designed home organization. This includes making physical products as well as offering practical, behavior-driven guidance to make organizing easier and more habitual.

By organizing our homes, we create both physical and mental space to be more mindful in the everyday habits and routines that comprise our lives."



KATY MARSHALL
GENERAL MANAGER
OPEN SPACES
A PATTERN BRAND

LOOKING AHEAD

What Have We Learned?

As we've worked to change how we live at home these past five years, it's been an incredible and unexpected delight watching our adjacent industries innovate alongside us in real time. From our unique vantage point, we've observed how these changes make their way inside and manifest in the daily habits of our members and within their four walls, which is a great privilege indeed.

But now that we've reminisced about the past, what's next for us at Hello Alfred? In the coming years, we plan to...

REDUCE OUR CARBON FOOTPRINT — AND YOURS

Cutting down on packaging and paper goods, using eco-minded products in our buildings, partnering with other sustainable brands and helping you understand where your products come from — we'll be pushing our commitment to sustainability even further in the coming years.

CHAMPION LOCAL PARTNERS AND CELEBRATE OUR UNIQUE COMMUNITIES

The way we see it, we're a network of small neighborhood businesses that just happens to have a national presence — and we wouldn't have it any other way. We believe in putting the community at the center of the conversation and doing our part to bolster the local economy.

CREATE A WORLD WHERE WE ALL HAVE HELP

By diversifying the services we offer and how we provide them, we can positively impact more people in more cities. Whether a member is 23 or 83, single or a family of five, we believe everyone can benefit from a little help — and we're finding a way to get it to them.

Most of all, though, we want to ensure everyone — our members, our team, our partners — comes home happy at the end of their day. The support we've received from all of you these past five years is the reason we're here and why we've been able to pay it forward to countless households across the country.

We can't wait to see what more the future will bring — and no matter what, we're so thankful to be a part of yours.



DOWNLOAD THE APP.
SIGN UP FOR SERVICE.
COME HOME HAPPY.

HELLO Alfred

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