

Moving pieces

The role of home in a changing world





→ Look inside

... for a story of home that needs telling.

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The what, why, how and who of this report.

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Executive summary

This is a world of many moving pieces. Socio-political uncertainty, climate change and accelerating technologies are some of the major movements reshaping how people live, work and look after themselves. More than six in ten worry about climate change and almost half feel it personally. Household finances, physical health and the state of the economy top the list of everyday concerns.

And yet, in the middle of all this turbulence, something holds steady: home. Those who feel happy with their life at home have a much more positive outlook on the future: 65% vs 48% global average. Optimism is also higher for people whose home allows them to live sustainably, as well as those who've experienced a significant life event in the past year.

But there's a gap between what people need from their homes and what they actually experience. Control, comfort and security are the essential needs that everything else rests on – yet across

all three, the gap between how important they feel and how often people experience them is striking. The size of the gap depends on individual circumstances, from life changes to financial pressure. For many, meeting these needs is as much about affordability as aspiration.

The good news is that people are already acting. 83% are taking steps to address climate change and 81% want to do more. Although knowledge, confidence and cost can hold people back, many are still doing their bit from home: from repairing and donating to planning storage updates to get more control and save resources. And with 54% saying that saving money would encourage them to make more sustainable changes, finances can be a motivator as well as a barrier.

This report is an invitation to understand and embrace change. Because a better home doesn't just make life more comfortable – it can help people get ready for whatever comes next. It's all about moving the pieces that matter.

“Home is the foundation. It is the ultimate foundation. When we get that right, we can support ourselves to face the world.”

Michelle Ogundehin – Homes therapist, author and TV presenter





Hej!

Every year we speak to people around the world to find out what life at home means today – and how we can help make it better. That’s what the IKEA Life at Home Report has always been about. In this edition, we welcome a new friend to the table: our people and planet consumer insights and trends. Why? Because we know that sustainable, affordable living is central to meeting people’s emotional needs and helping them to live a better life at home.

Research to rely on

As in previous editions, this report is based on quantitative, qualitative and trend research, which you can read more about on the [Methodology](#) page. Our insights are woven into the chapters throughout, usually with numbers from the surveys and quotes from people we’ve talked to. You can also find our [Top 10 insights](#) from this year’s research.

Powered by people

IKEA by name, but so much more by nature. This report is a celebration of different perspectives. As well as the thousands of people behind the data, we’re joined by experts on the home, sustainability, data, futures and interiors (some of whom we’re proud to call our own) – as well as

real homes experiencing real change in different parts of the world. We introduce them in [Voices of change](#), our very own meet-and-greet. By the end of the report, you’ll know them even better.

The next level

We all know that actions speak louder than words. That’s why the second half of the report takes the research to the next level: into the realm of actions, solutions, and small but achievable ways to make a difference through the home. On another level entirely is our [PS section](#) at the end of the report – home to a detailed listing of all the data presented in the chapters, as well as a few explainers to oil the wheels.

Ready, steady, go

At IKEA, we believe home must become an active participant in a world of moving pieces: a place that doesn’t just withstand change, but helps the many navigate it with confidence. The first step? Getting ready. And that’s what this report is all about.

All set to get started?

Methodology

Life at Home Quantitative Research

Source: [YouGov](#)

In 2025, the survey was completed among a nationally representative sample of people aged 18+ in 31 countries*. The total global sample consists of 31,689 participants, with each market contributing approximately 1,000 respondents, except New Zealand with 500 respondents. The 2023 and 2024 surveys were run in a larger number of countries. This data only includes historic data from the same 31 countries where the survey was run in 2025.

The quantitative Life at Home study was conducted as an online survey (CAWI, computer-assisted web interviewing). The data collection was completed in July 2025.

Data for each country is weighted according to the dimensions of gender, age and geography on the basis of an ideal weighting, so that the results are representative of the population in the target group. Each country has the same weight

in global results. New Zealand is given added weight to make their results equal to those from other countries despite their lower numbers of interviews.

Life at Home Qualitative Research

Source: [Crowd DNA](#)

Qualitative data was gathered in 2024 from 48 home ethnographies and 72 digital immersions in six countries: China, Germany, India, Spain, UK, USA.

People & Planet Consumer Insights & Trends

Source: [GlobeScan](#)

Research for this study was conducted online using reputable national consumer research panels to recruit respondents across 30 countries*. The total global sample consists of 30,701 participants, with each market contributing approximately 1,000 respondents. All countries are weighted equally when calculating global figures. Fieldwork took place between 10 March and 22 April 2025.

Samples were designed to be as nationally representative as realistically possible through online panels. However, some exceptions apply in markets such as China and India, where online access patterns result in a disproportionately higher number of highly educated and urban consumers. In India specifically, the 2025 sample was adjusted to focus on six target regions: Bengaluru, Chennai, Delhi NCR, Hyderabad, Mumbai and Pune. Because earlier waves of research covered the entire country, trend comparisons for India should be treated with caution.

In the report, trends compare the 2025 data with findings from 2019, 2021 and 2023. There are minor differences in the number of markets included across years, as Ukraine and Russia were not part of the 2023 or 2025 studies. These changes, however, have only a minimal impact on global results, generally within 0-1 percentage points. Finally, due to rounding, some figures may not sum to exactly 100 percent.

Trends and foresights

At IKEA, we have a team working with foresight and trend research. This year, they’ve identified large-scale trends that correlate with the themes of the report, as well as narrower trends that show up in some of the cultural shifts and changes.

Home stories

The home stories featured in this report (Germany, Japan, Portugal) have a communicative purpose: to showcase the report findings and insights through real lives at home. These stories were not part of the Life at Home Qualitative Research.

A note on the data

Unless otherwise stated, all statistics given in this report are the global average: the average, or mean, answer to a certain question by all respondents, in all countries surveyed. Detailed wording for all data points, as well as explainers behind the research, can be found in the [PS section](#) at the end of the report.

*Countries surveyed in both Life at Home Quantitative Research and People & Planet Consumer Insights & Trends: Australia, Austria, Belgium, Canada, China, Croatia, Czech Republic, Denmark, Finland, France, Germany, Hungary, India, Ireland, Italy, Japan, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, UK, USA. Additional country surveyed in Life at Home Quantitative Research: New Zealand.

Top 10 insights

01

In a turbulent world, home and change can be a source of optimism.

02

Concerns for the future of home are connected to finances and health.

03

The need for control is seen as important, but people aren’t getting enough of it.

04

Comfort is becoming important in a more turbulent external world.

05

Home is becoming the frontline of resilience – people want help getting ready for change.

06

Climate change and inequality are no longer abstract fears and changes.

07

Sustainability in the home is becoming a desire, not just a responsibility.

08

People need more confidence in their ability to make positive change.

09

Saving money and health benefits are key motivators for climate action.

10

There are actions everyone can take at home that are good for the planet, health and wallet.

Data points

01.

If you’re happy with your current life at home, you’re more likely to be optimistic about the future (65% vs 48% average). Change can also be an opportunity for positivity and growth: 53% of people have experienced one or more major life events in the last year, and these people are more likely to have a positive outlook on the future.
02.

People’s top concerns in life at home are their household finances and disposable income (37%), their physical health (37%) and the current state of the economy in their country (31%).
03.

Control is important to 74% of people, yet only 59% feel they experience it often in the home.
04.

At 86%, comfort is of high importance – yet only 66% experience it often in the home. For many, comfort equals having a tidy and organised home (43%), being with the people they love (43%) or having the right amount of privacy (35%).
05.

When asked about their ideal home, 56% want a place that helps them relax and unwind. For 39%, it’s a home that helps them be their true self and for 29% it’s one that helps them become physically or mentally stronger.
06.

64% worry about climate change and almost half (45%) feel personally impacted, especially those living with children. People most commonly
07.

83% are already taking climate action and 81% are willing to do more. 21% say their ideal home would help them live sustainably.
08.

44% say they don’t know which actions have the biggest impact.
09.

54% say saving money and 41% say health
10.

Only 15% of people eat vegetarian or vegan, but it’s an impactful climate action. Meanwhile, 82% store food properly to keep it fresh for longer and 70% are already repairing, selling or donating broken or unwanted furniture.
- feel climate change through extreme heat and rising food prices. More than 6 in 10 (61%) worry about inequality and 69% are taking some action to address it. Inequality concern rises among LGBTQ+ (77%) and marginalised religious groups (74%).
- benefits would motivate more climate action.

Voices of change

Meet the homes and voices shared in this report: real people navigating change, and the expert thinkers and doers who help make sense of it.

Home stories

Anna Tokyo Bay, Japan
A rented two-bedroom flat near the water – chosen as much for Rada, the family dog, as for Anna and her husband. When he changed jobs and stopped working from home, she rethought the layout and routines. As life changed, their home changed with it. Their safe place, flexible enough to adapt again.



Frank Frankfurt, Germany
Thirty years in the same apartment – consistency in an ever-changing world. Life may have its ups and downs, but for Frank, home is a place he can rely on. Surrounded by technology, gadgets and the objects that matter to him, he’s built a dependable, familiar space where he feels comfortable and in control.



Gina Giessen, Germany
Shared living that works both ways. After living alone, Gina decided to share a larger apartment with a flatmate. It gives her the best of both worlds: communal spaces for shared activities and own rooms for privacy. And a chance for the small, sustainable choices she already makes to go that bit further.



Júlia, Ana and family Lisbon, Portugal
Three generations making life at home work, together. As a temporary measure and for mutual benefit, Júlia moved in with her daughter Ana and family – and stayed put. Now she’s an anchor for everyone, grandchildren included. Their go-to place to gather? The living room, and the dining table at its heart.



Oscar and family Gross-Gerau, Germany
A mid-terrace house that feels more like theirs every day. Little by little, room by room, Oscar and his wife Anna have renovated, rebuilt and reimagined. As their home continues to evolve, adapting to their needs and those of their growing children, so does their sense of belonging. Even if the wish list remains.



Saori and Kenta Saitama Prefecture, Japan
Seven people, three generations, one house – and the family shop next door. Saori and Kenta designed their home to grow with the family, building in wheelchair access and wide doorways so the home could flex as needs changed. Getting ready for life, consciously and resourcefully: that’s the plan.



Warabi Sendai City, Japan
As a husband and father of small children, Warabi likes to be prepared and organised. His home is a considered response to an uncertain world, designed around storage and movement to make daily life run more smoothly. Giving the kids their own storage to look after encourages them to do the same.



Experts

Abbey Stark Home furnishing direction leader, IKEA USA
The diverse needs of the many Americans sit at the heart of Abbey’s work to drive home furnishing inspiration and elevate life at home. She and her French bulldog, Mumford, live in a row home in Philadelphia, where she’s constantly curating and evolving her spaces. Abbey believes a considered approach is also helpful in times of change, when she feels it’s important to think carefully how transitions shape the home.



Maria Jonsson Insight leader, Ingka Group
Driven by curiosity about people and societal change, Maria researches how needs, frustrations and aspirations for home are evolving around the world – helping IKEA create more relevant home furnishing solutions in response. She and her family are slowly settling into their new home in Malmö, Sweden, where a small green garden and the familiar sight of lilacs offer a reassuring sense of continuity in a season of change.



Anna Rosling Rönnlund Data visualisation pioneer, co-founder of Gapminder
A visionary thought-leader, designer and speaker, Anna is co-founder of the Gapminder Foundation, creator of Dollar Street and co-author of the international bestseller *Factfulness*, helping people and organisations to see the world more clearly through data. She lives with her family and four cats on the ninth floor of a Stockholm apartment block – a home where she describes the windows as the greatest luxury of all.



Michelle Ogundehin Homes therapist, author and TV presenter
A passionate advocate for healthier, more sustainable living, Michelle explores the relationship between home and wellbeing. She’s currently renovating an 18th-century house in the English countryside, retrofitting healthier materials, improving energy efficiency and reusing what she can. Her home embodies her belief that the most sustainable home is often the one you already have – thoughtfully adapted to meet the needs of modern life.



Julian Bleecker, PhD Designer and founder of Near Future Laboratory
A researcher, designer, engineer and author based in Venice Beach, California, Julian helps organisations to discuss and act on emerging technologies, possible futures and strategic decisions. His favourite space at home is the backyard studio he shares with his trusted assistant, Chewy the dog. Julian believes the key to improving challenging spaces at home is finding ways to give them a fresh, new meaning.



Queenie Lee Home furnishing direction leader, IKEA Japan
From campaigns and content to real-life transformations, Queenie’s work is focused on translating home furnishing knowledge into meaningful experiences. In the small home she shares with her husband and 11-year-old chocolate Labrador, she’s at her happiest when mid-morning sunlight mingles with the scent of coffee and incense. Queenie is a strong believer that moving house is a gradual process that should never be rushed.



Kimberly Nicholas, PhD Professor of sustainability science, Lund University
A sustainability scientist and bestselling author based in Lund, Sweden, Kimberly studies how to inspire effective climate action. In a city centre building dating from 1912, she and her husband share an apartment converted from an attic in the 1980s. They’re currently purging things they don’t love or use, trying to achieve their goal of a home that feels calm and frictionless, with a place for everything.



Chapter 1



Life in motion

The way the world turns

Life is constantly shifting. You can feel it all around: in your news feed, your weather app, your food bill. But it's also happening in the spaces people inhabit. A new routine. A new arrival. The space that no longer fits.

“When we imagine change, we forget to imagine the good things that will come out of it.”

Kimberly Nicholas – Professor of sustainability science, Lund University

For many people, it's a lot right now. Concerns about the economy, mental health, social division and screen time have risen in the past year. Almost half of people feel personally impacted by climate change and over six in ten worry about it. The same proportion are worried about inequality. These anxieties don't exist in isolation. They're rooted in broader shifts reshaping how people live, work, love and look after themselves at home.

And yet, the numbers also tell a different story. More than three in four people have a positive or neutral outlook on the next two years. And 53%

of those who have experienced a life event in the past year – good or bad – are optimistic about the future, 5% points above average. “We tend to be pretty change-averse,” says sustainability scientist Kimberly Nicholas. “When we imagine change, we forget to imagine the good things that will come out of it. Even negative life events can still result in growth.”

In a turbulent world, change has a habit of turning up unannounced. But home is often where it lands first – and where people can figure out how to work with it.



Constant change can bring its fair share of worry, especially in a world overflowing with negative news stories. “Now we hear about every accident and weather catastrophe,” says Gapminder co-founder Anna Rosling Rönnlund. “The world sounds much scarier today because of the information overload.”

6 in 10

The number of people who worry about climate change or inequality.

5 out of 5

How many of this year’s top life at home concerns are connected to money and health.

+2% points

The rise in concern about country economy, mental health and social division in the past year.

45%

How many feel personally impacted by climate change.

Same world, different story

76%

The number of people with a positive or neutral outlook on the next two years.

8 in 10

How many are already taking some action on climate change or willing to do more.

+5% points

How much more optimistic than average those who have recently experienced a life event are.

69%

How many are taking some action to help address inequality.

At the same time, many people are staying positive and choosing to take meaningful action. “There’s a gap between people’s perceptions and actual trends,” Anna points out. “Yes, there are serious problems in the world, but there’s also lots of things improving over time that we forget to focus on.”

A bigger picture

Three broad fronts of socio-political uncertainty, climate change and accelerated technologies are reshaping what it means to feel at home in the world today. How do they show up and where are the opportunities?

→ Cultural responses

- Movements focused on reconnecting people to place are gaining traction as a response to global instability – from “bioregioning” to hyper-local community networks.
- The trend of “regular-maxxing” is all about finding comfort in the familiar – treating local spots like cafés and corner shops as a second home.

Ana tries to disconnect when she can.



Society at stretching point

“How did we get to this point?” wonders Ana in Portugal, who admits to avoiding the news to keep a sense of balance in the everyday – even if that’s easier said than done in a hyperconnected world.

The uncertain geopolitical environment is creating instability both domestically and globally. Political polarisation, rising inequalities and the spread of misinformation are eroding trust. Meanwhile, a shrinking middle class and increased military spending are creating financial instability and deepening social division in communities.

Inequality concern is high but unevenly felt. From a global average of 61%, it rises to 77% among LGBTQ+ and 74% in marginalised religious groups. Economic anxiety varies just as sharply by country: 47% in Romania and 46% in the UK say the state of the economy is a top concern, compared to just 11% in Denmark.

On a brighter note, 69% are taking some action to help address inequality. And when it comes to climate change, saving money is the top motivator to do something to help.



The future of home

In a world where global socio-political structures feel unstable, futurist Julian Bleecker imagines people building smaller, more manageable ones – rooted in their street, block or neighbourhood:

“What if homes became the primary sites for building cognitive resilience and media literacy – with shared rituals of meaning-making, debriefs about what’s real, what’s noise, and how to navigate competing narratives?”

Julian Bleecker – Founder, Near Future Laboratory



A planet under pressure

“You keep hearing that climate targets aren’t being met,” says Gina in Germany. “As a young person, you can’t help but think about what that means for your future. Nevertheless, I try to stay optimistic.”

The effects of climate change are increasingly showing up in neighbourhoods, streets and homes the world over. In fact, almost one in five people now say extreme weather events – from extreme heat or cold to increased flooding and rainfall – are a top life at home concern, rising to one in three in China. “In recent years, all types of rain

have a name,” Ana observes, thinking about the Portuguese weather. “In the past they called it rain, now it’s baptised.”

Despite the concerns, many still intend to act: 83% are already taking some action on climate change and 81% are willing to do more. The barriers aren’t apathy – they’re cost, knowledge and a lack of support. But where people do feel their home allows them to live sustainably, they’re 9% points more likely to feel positive about the future.

→ Cultural responses

- By coming together at block level to prepare for emergencies, local communities are building climate resilience close to home – from net-zero community hubs to pools that double as water reservoirs.
- Amid rising global temperatures, cities are increasingly embracing “nocturnal living” – formally redesigning spaces and services around cooler evening hours.

“

The future of home

As the effects of climate change knock more insistently at people's doors, futurist Julian explores the role of home – not just to block the outside world, but to quietly manage what gets through:

“What if the home became a climate shield – quietly mediating smoke, heat and pollution to keep the indoor experience calm, breathable and stable even through extreme weather?”

Julian Bleecker

Keeping up with tech

“What is real and how can you tell?” ask Oscar and Anna in Germany when we get talking about AI. It’s a thought that resonates with other research and media.

Technology is changing faster than most can keep up with, reshaping how people work, learn and make decisions – and its impact on people and planet is only growing. People’s recreational activities are also affected, with 69% saying that traditional playtime has been replaced with screen time*. Regulations are being tightened to bring it under control, with governments and families alike attempting to draw lines that keep moving.

Echoing the 20% who now cite screen time as a top concern, Oscar and Anna also worry about their teenager’s screen use. It’s backed up by large-scale studies showing the link between more screen time and increased aggression, anxiety and low self-confidence in children**, as well as between heavy social media use and lower wellbeing in teenagers***.

At the same time, many people have hobbies connected to technology. Young people are arguably best placed to harness the potential of smart tech, with under 30s leading the way in using it to save energy.



Oscar is concerned about AI and his teenager’s screen time.

→ Cultural responses

- Already active in cities across Europe, The Offline Club gives people spaces to switch off, slow down and reconnect face to face.
- Increasingly popular among younger generations, “mini-retirements” are short pauses to rest, reassess and remember what matters.

*Play Forward, Ingka Centres Life in Communities Report 2026
**Electronic Screen Use and Children’s Socioemotional Problems (APA, 2025)
***World Happiness Report 2026



The future of home

With smart technology occupying an ever-more influential space at home, futurist Julian explores how devices could play a truly active part in how daily life unfolds:

“What if appliances became co-authors of domestic life, actors with intentions that could shape how we start the day, rest, eat and connect?”

Julian Bleecker



Bringing change home

In a world that never stops moving, how can home help? It starts with the type of change – and the response.

Life at home change framework

Based on Schlossberg's Transition Theory (2012) and IKEA life at home research and knowledge. For more on the IKEA life at home needs, go to [Chapter 2](#).



Home sits at the intersection of big shifts and personal transitions. Sometimes they collide. Sometimes one triggers the other. Often, they come together.

Change can show up in different ways, at different times – and the home can be a crucial partner in helping people adapt. Warabi in Japan saw it coming, planning his family’s new home in detail before the big move. In Germany, Gina’s decision to move in with a friend was sparked by a realisation that she didn’t want to live alone anymore. In Portugal, an unexpected deluge of rain halfway through construction work forced Ana and her family to think and act fast, working together daily to cope with the influx of water into the house.

A model of change
The IKEA life at home change framework is a simple way to understand where someone might be in a moment of change and what they might need from home to move through it. The more those needs are met, the better equipped they are to face the change.

Ready to respond

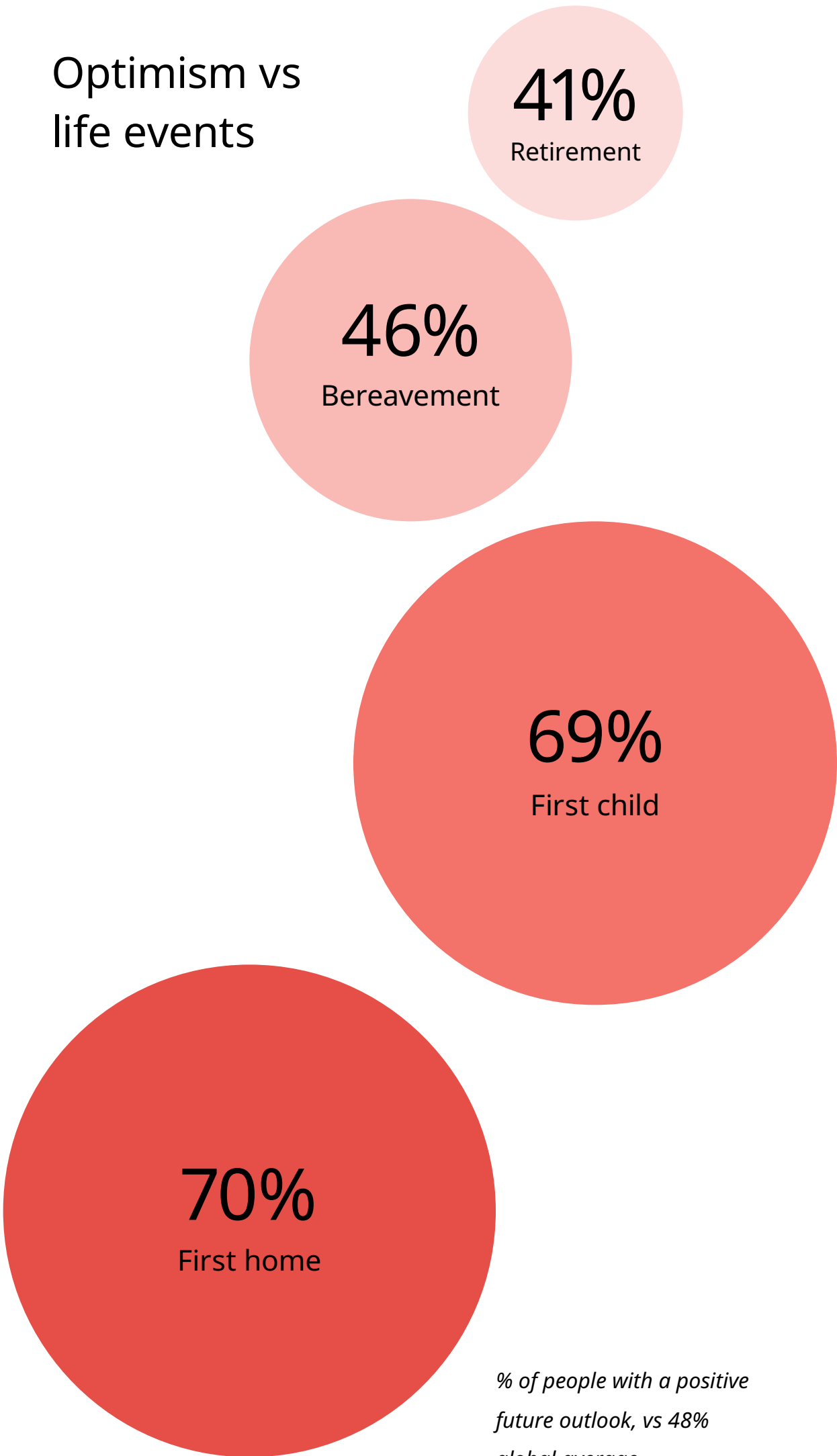
People’s response to change depends on where they are in life and what that life looks like. This life at home knowledge can help people to elevate the role of home in their lives: from a place that withstands change to one that helps them navigate it with confidence. With those who are happy with their current life at home also shown to be more optimistic about the future (65% vs 48% average), it’s an opportunity well worth exploring.

Key moments

From births to bereavement, life events are the key moments that quietly reorganise everything. They’re also powerful emotional amplifiers that shape people’s view of the future. A first home or first child, for example, brings a heightened sense of optimism, while retiring or losing a loved one – something almost one in eight have experienced recently – has the opposite effect.

However painful, the upheaval of a life event can also be a moment of possibility. When Warabi and his young family outgrew their flat and moved to a new home and neighbourhood in Sendai City, his instinct wasn’t to brace for the disruption – but to “just give it a go”. This spirit of positivity is something he also tries to instil in his children, trusting that it will help them to cope with life’s many twists and turns. Just the other day, for instance, his daughter went to her new primary school without knowing anyone there. “She walked in completely on her own. I was really moved by it,” Warabi recalls.

Optimism vs life events



Gina’s personal style is evident in her room.

Time of life

Life stages play a big part in how people think about themselves and, as a result, what they might focus on in times of change. Among those at the pre-family stage, 41% say their ideal home is one that allows them to be their true self self (39% global average). Take 23-year-old Gina in Giessen, whose room is, quite deliberately, a portrait of who she is. “My goal is to gradually fill up the walls so that my personal style is evident in the room,” she proudly declares, surveying her purple and yellow bedroom hung with pictures she made herself.

For those with a young family, the need for self-expression at home drops to 32%. Since becoming a father of two, Warabi’s personal space has shrunk – and any me time tends to happen in the quiet hour after the children go to bed. “Once the kids have moved out, I’d love to have my own study,” he says. “It’s a dream.” For now, though, the home belongs to the family. And that suits him just fine.

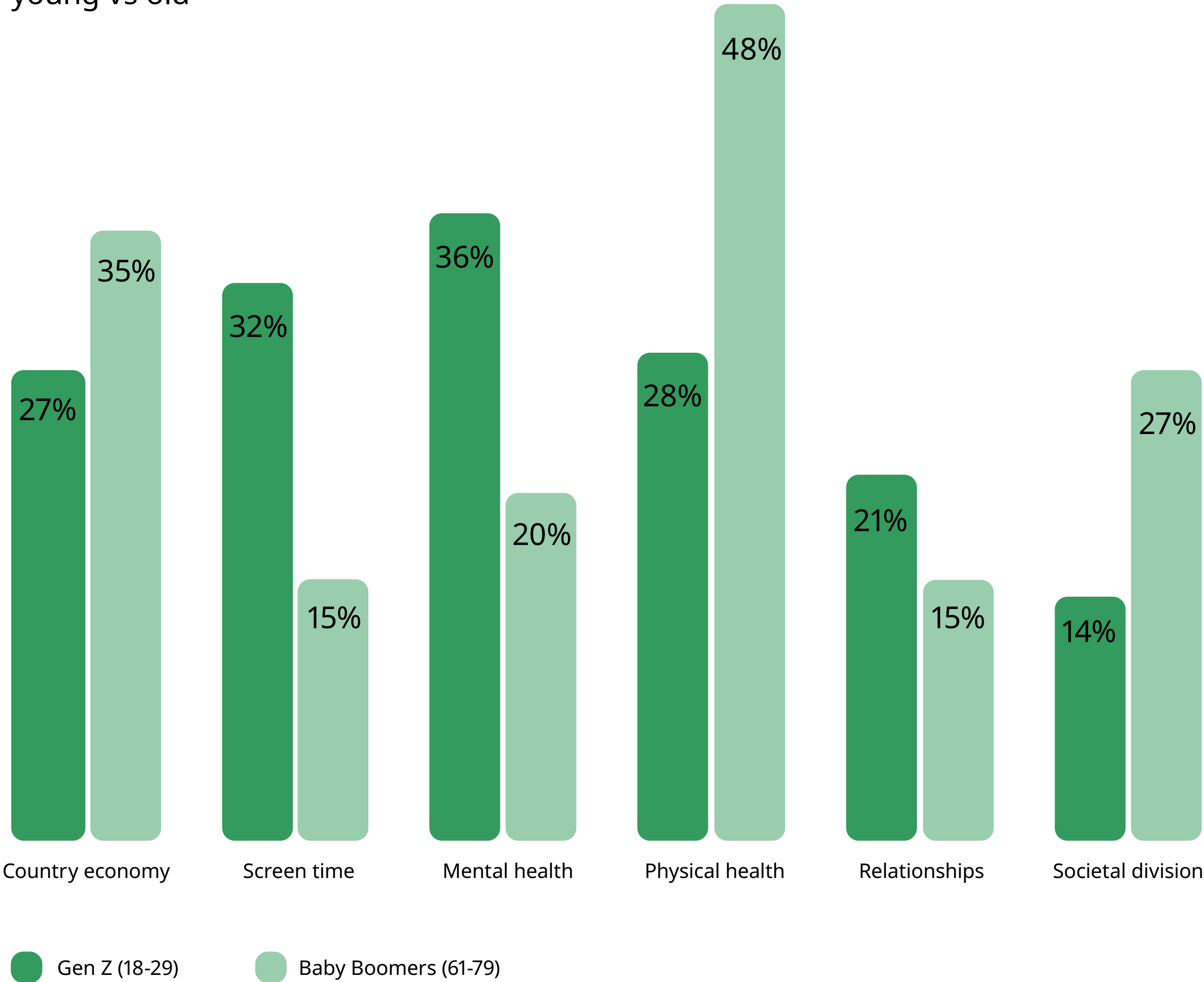
Age concerns
Different generations worry about different things. Younger adults feel more concern about screen time, mental health and relationships. Older adults, meanwhile, are more likely to fret over the economy and physical health, as well as divisions in society. People aged 18-24 are also the most concerned age group when it comes to climate change.

In 2025, the Guardian reported on a relationship recession*: more people than ever choosing to be single. Changes in relationships and family constructs are also resulting in policy changes – in Sweden, for example, where paid parental leave has been extended to grandparents, friends and other caregivers.

In Portugal, 84-year-old Júlia is one of many older people reinventing their role in the family and finding their own ways to stay connected: from regular Pilates classes and dinners with friends to joining her granddaughter’s TikTok adventures from the sofa.

*We’re in a relationship recession – and a lot of women are absolutely fine with that | Emma Beddington | The Guardian

Life at home concerns:
young vs old



18-24s and people with children worry the most about climate change.



Worry a lot/fair amount about climate change, vs 64% global average

Way of life

People’s living situation has a real impact on what they care about at home. Among those surveyed in co-living facilities, 28% list relationships with those around them as a top concern, compared to just 16% of those who own their apartment. When it comes to climate change, those living with children are 5% points more concerned than those without. Yet, as Kimberly Nicholas observes: “People tend to drive more and eat more meat after they have kids.” Good intentions and daily behaviour don’t always move in the same direction.

Ownership also shapes ambition. Among apartment owners, 24% aspire to live more sustainably versus 10% of people surveyed in university halls. Interestingly, 75% of those who feel their home allows them to live sustainably feel positive about their current life at home – rising to 77% for those whose home lets out their playful side – against a global average of 63%.

From refuge to resource

Whatever the living situation, generation, life stage or event, change has a direct impact on life at home – and life at home shapes how people respond. That’s why the traditional idea of home as a refuge is giving way to something new: a space not only to withstand change, but to meet it with confidence.

Where we stand

The world is changing. Climate pressures, political and economic instability, technological developments – these aren't distant headlines. They're reshaping how people live, look after themselves and relate to one another, often right inside their own homes.

Change has many faces – big and small, good and bad. And it isn't only something coming from the outside in. People experience it from the inside too: a new home, a growing family, a life that looks different from the one they planned. What

connects all of it is how they respond, and the role that home can play in that. From refuge to resource.

What home needs to do

Across cultures and circumstances, people have the same needs at home when life shifts: a feeling of security, a sense of control, the comfort of a space that feels like theirs. In the next chapter, we explore how those needs can help people prepare for change – and empower them to embrace the positive life transitions they want to make.



Lessons in life at home: Portugal home visit

Home is family, family is home

Three generations under the same roof – brought closer by life events and everyday interactions.

Losing her husband had a huge impact on Júlia. But when enough time had passed after his death, her daughter Ana and son-in-law Gonçalo made her an offer that would change her life: come to live with them and their two teenage children. She accepted – and the rest is history.

Their practical approach to rearranging their Lisbon home to embrace a new chapter was entirely typical of this positive-thinking Portuguese family. The office became a bedroom. Ana's children Constança and Tomás took turns sharing with their grandmother – years



of it, without complaint. Ana's workspace migrated to the dining table, where it lives to this day, laptop and second screen side by side. "It's the 'puts it on, takes it off' stuff," she says. "But it works." A system designed out of necessity that everyone respects. Control, the family way.

Not that it's always neat and tidy – with five people, one kitchen and strongly held views on how to cook pasta. "Sometimes we disagree a little on the way of cooking," Constança says, in the quietly understated way of someone who's used to losing this argument, even now she's a young adult. But the table holds everything together – the same table where Ana now works, where Júlia's three-day *feijoada* lands on feast days, where sixteen people sat for lunch just yesterday. "The table is more than just a place for meals," says Gonçalo. "It's a place where people talk ... the unifying focus of thousands of things."

Beyond the walls

The world outside has been making itself felt at home, too. Last January, mid-renovation and with a slab exposed, the storms came. Buckets. Towels. Ceilings turned black. "There

was so much water," recalls Constança, "that we couldn't have carried the biggest bucket alone." When it was over, the family settled back into their routines: the lunches, the evenings, the tending of the plants. The comfort of ordinary life was the thing they'd missed most. For Ana, climate change isn't an abstract worry – it's the rain that now has a name, a deluge of water that suddenly felt closer than the sea three minutes away.

But they have so many other things of value close at hand, too. The beach. The neighbours. The light in the south-facing living room, where Ana's plants grow and the family assembles in the evenings.

"I like being part of this family. I wouldn't choose any other."

Júlia has pilates on Tuesdays and Thursdays, dinner with friends on Wednesdays, and Maré the dog never far away. At 84, she isn't a dependent but the one who holds the

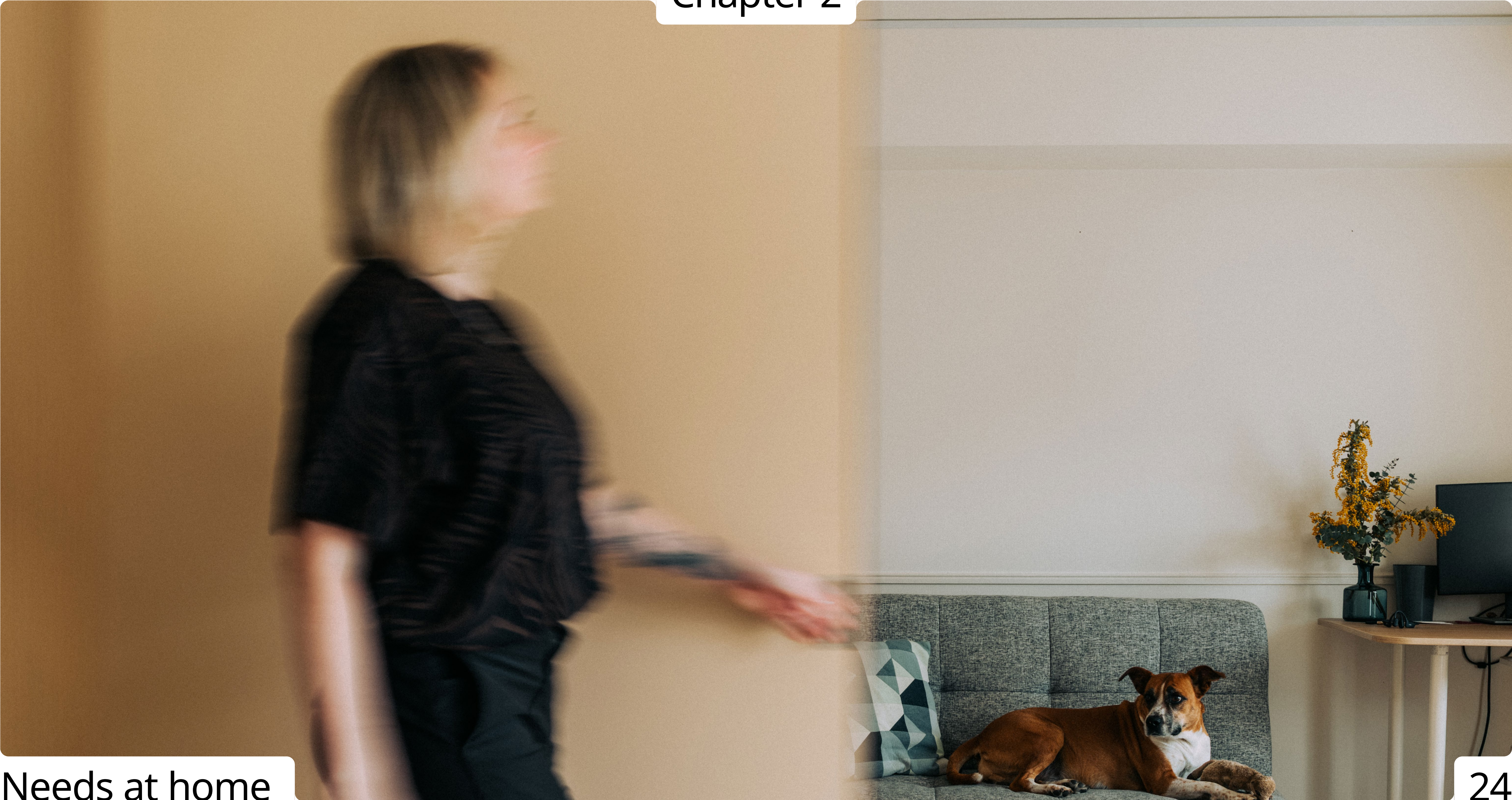
daily rhythm together: cooking lunches, keeping schedules, making sure no one feels alone. "I like being part of this family," she says simply. "I wouldn't choose any other."

The beauty of unfinished

Like most homes, this one is far from finished. Ana would love a garden – something she admits is "impossible", with the good grace of someone who's made peace with it. What she has instead is a home with 100-year-old furniture sharing space with things bought three years ago, second-hand clothes filling wardrobes, LED bulbs, and a serious effort to save water and electricity. Not sacrifice – just sensible. "I'm giving more and more importance to these small but important details," she says.

Gonçalo has another perspective. As someone who spends stretches of time working abroad, the slow pace of change is part of the appeal – home is the thing that stays put while life moves around it. That kind of security is hard to put a price on. "Home is family," he says. "And family is home."

Chapter 2



Needs at home

Never more needed

A changing world puts a lot on people – and their homes. To understand how home can help, we turn to the eight needs: a framework built on 11 years of IKEA research into what makes a better life at home.

“When the external world is volatile, the nervous system seeks stability.”

Michelle Ogundehin – Homes therapist, author and TV presenter

Feeling in control, comfortable and secure. Nurturing yourself and feeling like you belong. Finding enjoyment, feeling pride in progress and accomplishment, aspiring to something better. These are the eight needs that shape how well, and how fully, people experience life at home.

None of the needs work in isolation. Which is why, when life changes, it's rarely just one need that's affected – it's the whole ecosystem. This year's data makes that dynamic impossible to ignore, with importance scores across all eight needs at an all-time high.

When the world shifts, home has to work harder. And right now, it's working really hard.

A global rise

The rising importance of all eight needs is something that Maria Jonsson, insight leader at Ingka, has been aware of for a while. “We saw an indication already in August 2024 that especially security started to increase in importance, even

if it was small movements,” she says. “The world has seen a lot of uncertainty and turbulence since then, which is contributing to a substantial increase across all needs in our latest data.”

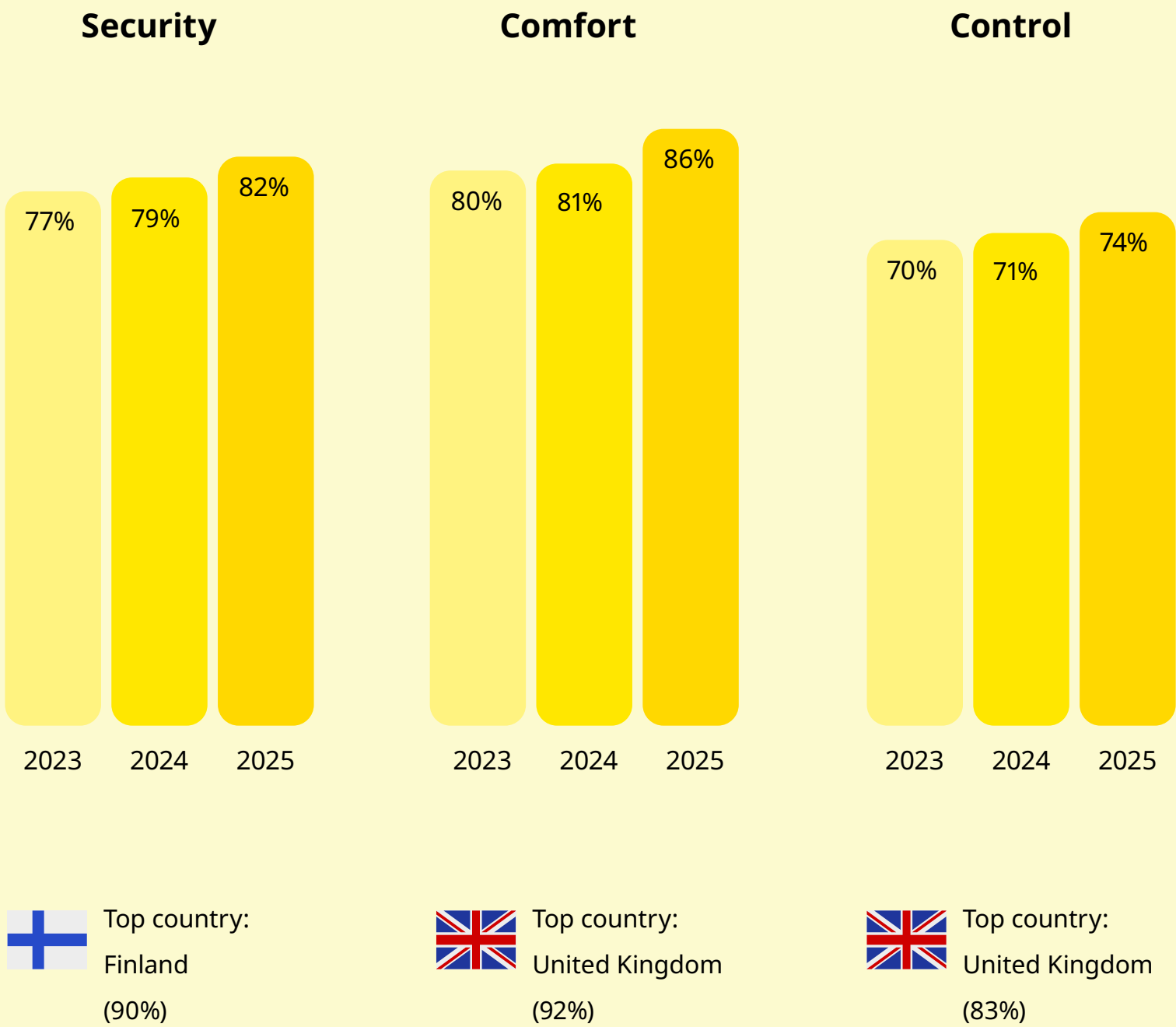
And yet, different countries feel the needs differently. Security, for instance, is most important in Finland while belonging matters most in China. More broadly, people in North America now rate the importance of the essential needs – security, comfort and control – more highly than people in Asia, Europe and the Pacific as a whole. An effect of increasing polarisation and political instability perhaps? “When the external world is volatile, the nervous system seeks stability,” homes therapist Michelle Ogundehin observes.

One thing remains consistent across countries: the more frequently people feel their needs are met at home, the better they feel about life there – both now and in the future.

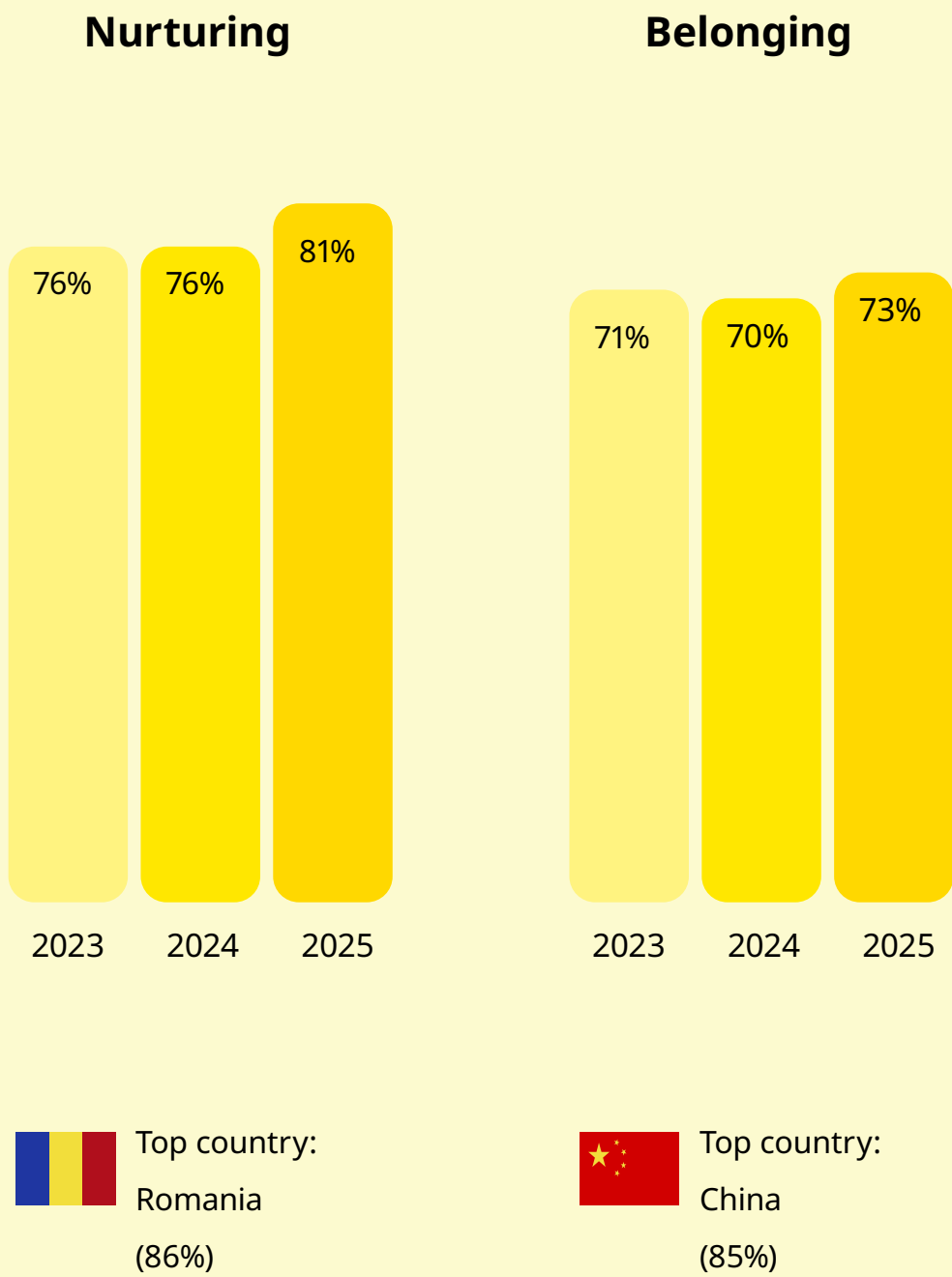
You can find full definitions of the needs in the [PS section](#).

The eight needs:
importance over time

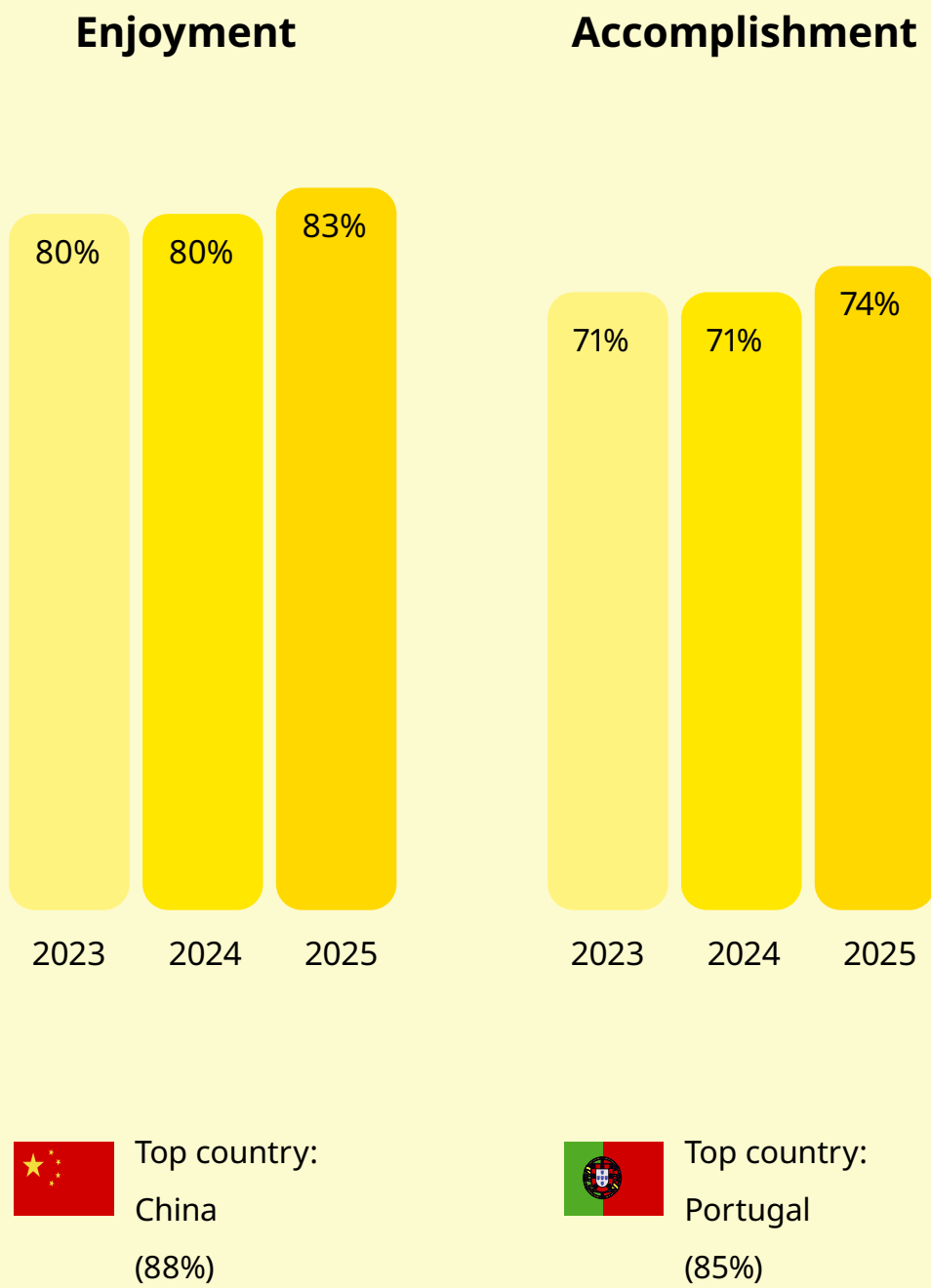
Everyday
essentials



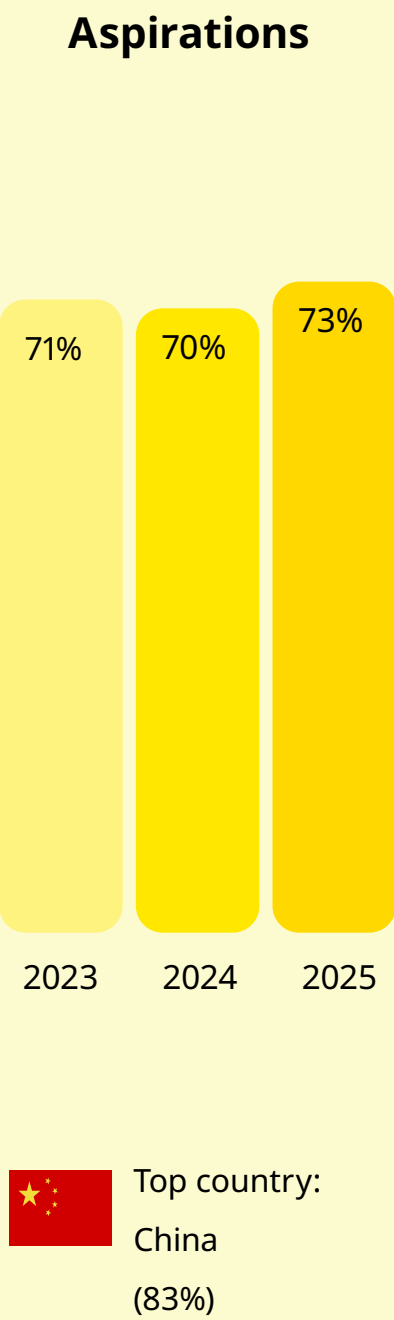
Regular
connections



Meaningful
moments



Future
plans



Back to basics

Security, comfort and control are the beating heart of a home that works – and right now, people are reaching for them more than ever.

In uncertain times, people tend to return to the same questions about home. Do I feel safe here? Do I feel comfortable? Do I feel in control of my space? These are the everyday essentials that make a home function, showing up consistently across cultures, income levels and life stages.

“Control, comfort and security aren’t luxuries – they’re foundational needs,” says Michelle Ogundehin. When they’re met, home turns from a shelter into what she calls “infrastructure for resilience” – a place people can recharge to face whatever the world brings next.

Yet for those living with energy poverty, rising costs or housing instability, even these foundations can feel out of reach. “We’re perceiving more and more threat,” Michelle continues. “So, we revert to the very basics that we need to feel safe. Can I lock my door? Can I afford my bills? Can I rest?”

For too many people, the answer is no.

Anna in Japan finds comfort in her own private make-up space.



“Can I lock my door? Can I afford my bills? Can I rest?”

Michelle Ogundehin

The bare essentials

They're the basic needs for a better life at home. And yet, for all three of the everyday essentials, there's a clear difference between what people want and what they experience.



Security

Definition: Protecting what you care about so that you feel secure and resilient to the changes of the world around you.

Status: Feeling secure at home matters to 82% of people – an increase of 5% points since 2023. At the same time, only 68% say they experience it regularly.



Comfort

Definition: Making sure your home environment allows you to feel content and at ease.

Status: Feeling comfortable at home is the most in-demand need – important to 86% of people and up by 5% points in the last year. However, only 66% experience it often.



Control

Definition: The need to have agency over your environment, what goes into it and how it's used.

Status: Being in control at home is important to 74% of people, up 4% points in the last two years. Yet only 59% are experiencing it on a regular basis.

Mind the gap

A need gap opens up when people say the need is important but only sometimes, rarely or never have it fulfilled.

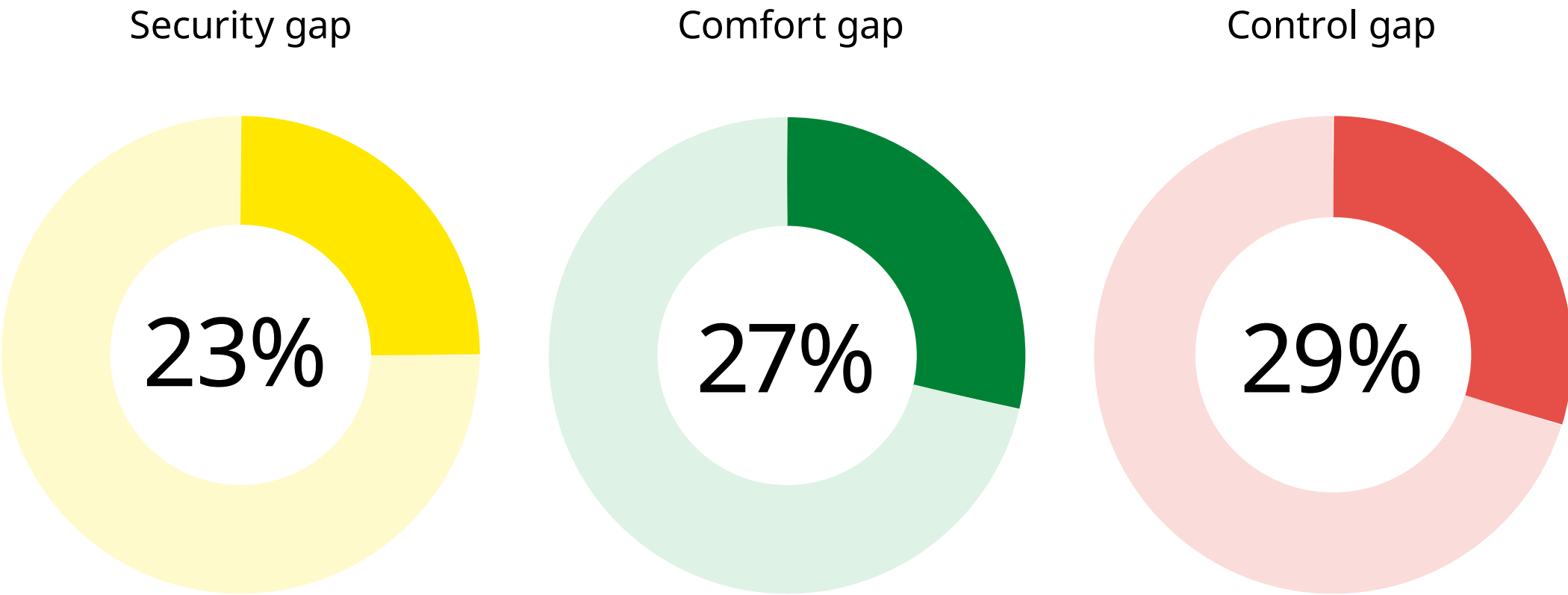
With financial pressure eroding security, comfort and control, the gap is often larger for people with lower incomes who are struggling to make ends meet. Many are actively cutting back, which may explain why 64% are often looking for the cheapest product on the market. Anna Rosling Rönnlund sees the challenge, while also recognising a hidden opportunity: “With fewer resources, homes are rarely ‘perfect’ – there’s always something small worth improving, which is why modest changes are so common and so powerful.”

Just as life changes, so do the gaps. The control gap peaks when people start college – deadlines and fresh surroundings, perhaps, or simply the shock of having to figure everything out alone for the first time. For comfort and security, it’s relationship breakdown that hits hardest. It makes you wonder: how much of what people feel at home depends on who they share it with?

Living situation matters, too, with people in flat shares reporting some of the largest control and



A gap can also be a possibility – like the crawlspace under Saori’s house in Japan.



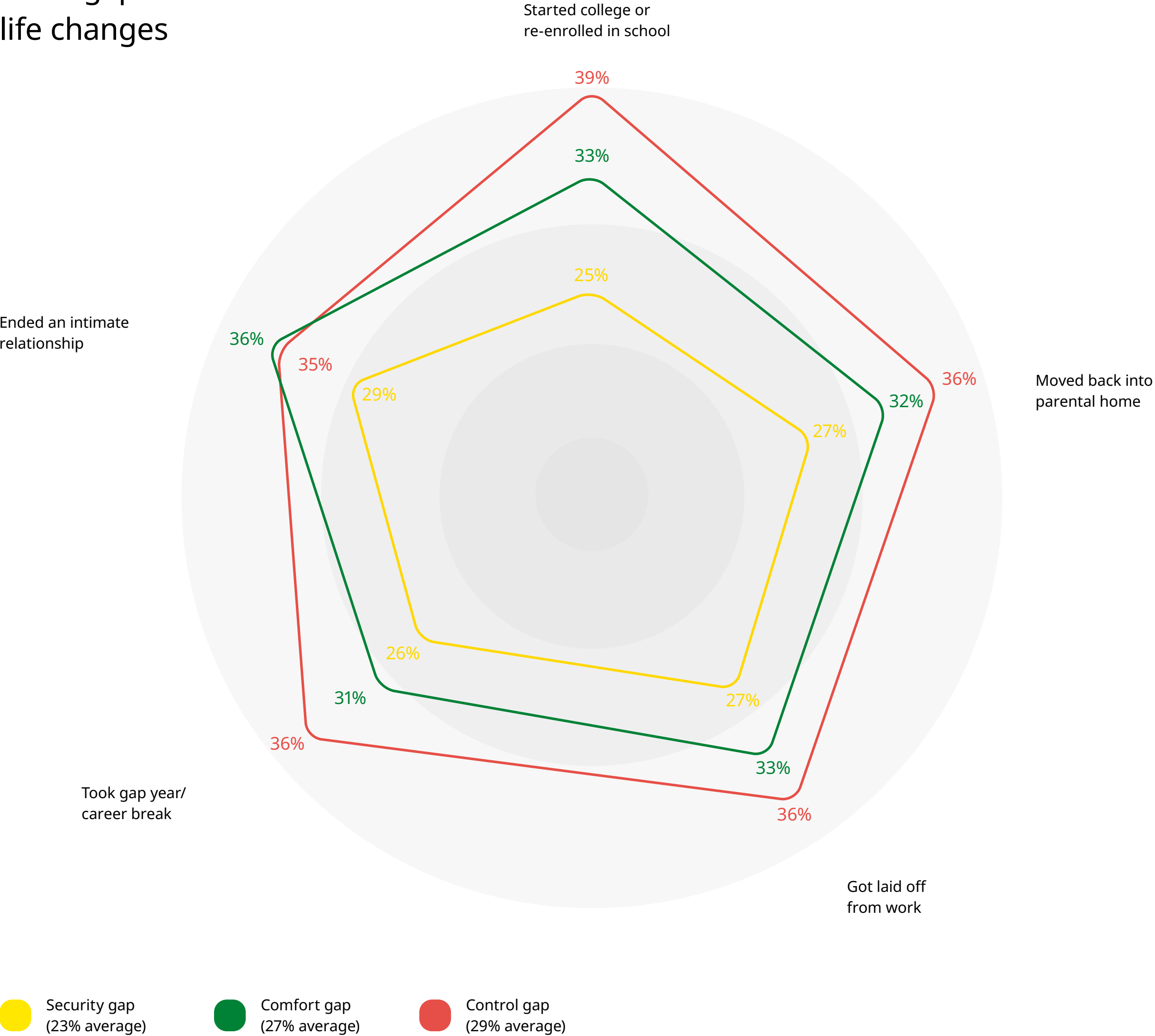
Need gaps: % of people who find the need important but only sometimes, rarely or never have it fulfilled.

Ups and downs

The need gaps don't sit still. They peak at moments of transition, often when life shifts suddenly and the home hasn't caught up yet.

→ Relationship breakdown hits hardest across all three needs. Michelle Ogundehin explains why it can be so disorienting: "The need gaps grow when you end an intimate relationship for many reasons. Practically, there's often financial strain, reduced income stability, and changed living arrangements. Emotionally, there could be loneliness or the loss of shared decision making. And spatially, there's the physical imprint of a previous relationship. So even if you stayed in the space, it's all the stuff that's missing."

Need gaps vs life changes



Steady ground

Security is the foundation for all the other life at home needs. Comfort is its natural companion.



“When we feel insecure, we want a tight, cosy, warm space – less about status, more about a safe haven.”

Anna Rosling Rönnlund – Co-founder, Gapminder

First and foremost, people need to feel secure at home. It’s the most essential need of all, the starting point that makes all the other needs possible. But none of the needs stand alone – and in people’s lives at home, security and comfort are rarely separate. As Anna Rosling Rönnlund observes: “When we feel insecure, we want a tight, cosy, warm space – less about status, more about a safe haven.”

People’s ability to truly feel secure and comfortable is shaped by forces bigger than the home. Financial

instability, employment, access to services – these are real, and the home alone can’t answer them. But within that bigger picture, home still matters. For most people, it’s where comfort is felt most reliably and where security is built from the ground up.

So, what’s driving the way people feel about security and comfort at home?



Security first

Among the broader shifts in the world, climate change is already affecting how secure people feel at home. But physical safety is only part of the picture. Rising political polarisation, inequality concern, and the spread of cyber threats and invasive surveillance are creating a different kind of insecurity – one that’s harder to name, and that’s likely to be felt most sharply by those already living on the margins.

“Safety has to be felt,” says Michelle Ogundehin. “It’s not about living in a nice cul-de-sac. It’s whether your nervous system actually detects safety.”

For Anna in Japan, living far from her home country in an unstable time, that detection is real and deliberate. Her home, she says, is “the safest place in the world for now” – a private space she’s shaped to feel like hers, in a city that isn’t. For fellow immigrants Oscar and Anna in Germany, it’s been a similar journey but longer. Over the last few years, they’ve slowly renovated their house, room by room: kitchen first, then the living room, the hallway, now the daughter’s bedroom. They’ve also built meaningful relationships with the neighbours. Security, for them, is something accumulated – slowly, in layers.

Anna feels her Tokyo home is the safest place in the world right now.

Safe and sound at home

When the wider world feels unstable, home can offer safety in different forms. Financial stability, for instance: for 40% of people, security means having a consistent income, while three in ten want savings to cover unexpected costs. On the physical side, 36% feel secure in a damp-free home with access to hot water, while 32% want access to services and amenities like water, plumbing and electricity. The basics, done well.

People matter, too. For 30%, it's about trusting those they live with, while almost a quarter feel secure with family and friends close by. And nearly

one in five get it from knowing their neighbours. As Kimberly Nicholas puts it: "Security doesn't come from razor wire. It comes from knowing your neighbours and helping each other. In disasters, it's your neighbours who will save your life, and vice versa."

Security becomes especially important in moments of transition. For those who've recently bought their first home, moved house or brought a child into the world, almost nine in ten say security is a priority. When you've just taken on something new, the need to protect it sharpens everything.

"Security doesn't come from razor wire. It comes from knowing your neighbours and helping each other."

Kimberly Nicholas



The comfort zone

Outside pressures are putting a squeeze on comfort, too.

Ana's family in Portugal know this from experience: when January storms found their way into the house, they ended up emptying buckets of water through the night, towels spread across every room. For many others, climate change isn't measured in millimetres of rain but felt in extreme heat and higher food prices* – which can also have a big impact on how at ease they feel at home.

How people live can also play a part. For Gina in Germany, sharing a flat means comfort is always negotiated. “For me, the most important thing is feeling comfortable and not lonely,” she says. She's willing to compromise to fulfill both needs.

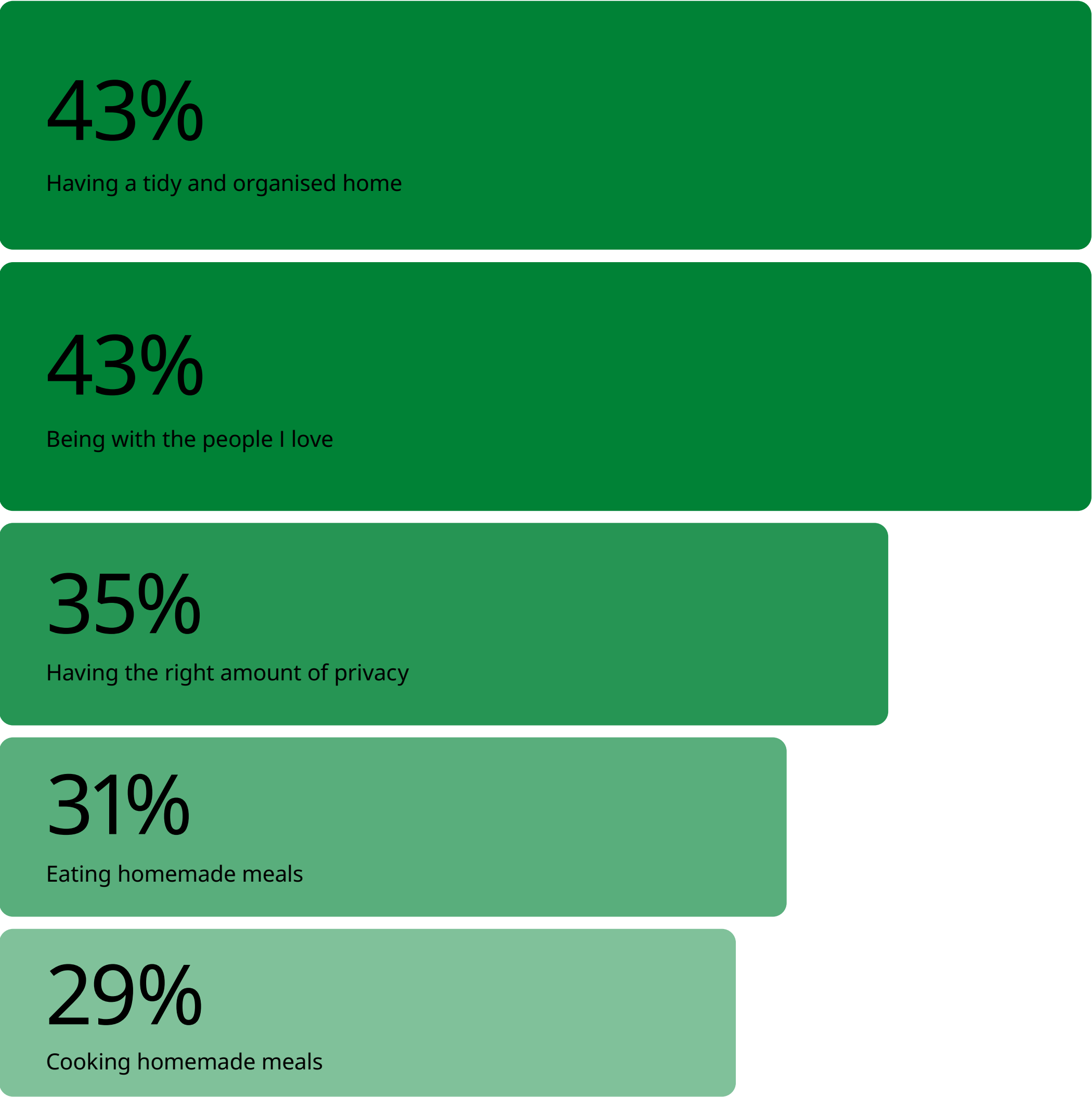
*GlobeScan Healthy & Sustainable Living, 2024



“For me, the most important thing is feeling comfortable and not lonely.”

Gina in Germany

Top 5 drivers of comfort



“The number of people in our lives has really grown day by day ... it’s very comfortable, and I feel like it’s what’s needed right now.”

Saori in Japan



Getting comfortable

Comfort at home works on two levels. There’s the emotional: the warmth of people, presence, belonging. And there’s the functional: the quiet satisfaction of a home that works the way you need it to.

Emotionally, for 43% of people, feeling content and at ease comes from being with the people they love. For those who’ve just finished school or college, that figure drops to 35% – a moment when you’re often still working out who you want to be around – but it rises steeply to 58% for those who’ve recently had a child. When life gets fuller and louder, closeness matters more. For Saori in Japan, who lives with three generations under

one roof, it’s exactly that: “The number of people in our lives has really grown day by day ... it’s very comfortable, and I feel like it’s what’s needed right now.”

Functionally, a tidy, organised home brings a sense of ease for 43% of people – equal to those who prize time with loved ones. Order, it turns out, is its own kind of comfort. And for 35%, the right amount of privacy matters just as much – though not always in the way you’d expect. “Having proper individual rooms is actually what makes people come out into the shared spaces more,” says Saori’s husband, Kenta. “Almost no one spends much time shut away in their room.”

Comfort in rooms

For each room where they spend most of their time at home, almost one in five people are planning to make changes. That's a lot of people quietly rethinking their bedroom, kitchen or living room – and what they need those spaces to do.

Comfort isn't just a feeling. It's something you build, room by room, choice by choice. The spaces where you sleep, cook, eat and unwind are the places where comfort either shows up or it doesn't. And when it doesn't, you notice.

Needs first

People want spaces that help them unwind and feel at ease, so IKEA interior designer Queenie Lee encourages them to think about their needs first and then choose the furniture for that space – not the other way around. When it comes to living areas, for example, she advises people to “avoid applying too many rules” and to focus instead on making them “the place where your life at home activities can happen” – even if it's a variety of activities within a limited space. This need for multifunctional spaces is driving demand for modular furniture, movable solutions and adaptable layouts.

It also means letting go of the idea that every room has a fixed purpose. As Queenie's colleague Abbey Stark points out, comfort isn't reserved for people with the right floor plan, or even specific rooms: “Not everyone has a living room – but even

if you don't, you can still create a sense of comfort in other rooms.” Imagine a dorm room bed turned into a daytime sofa with cushions against the wall, for example, or a comfy reclining armchair in the kitchen corner for screentime, working or enjoying a meal on.

From textiles to lighting to single pieces that earn their place in multiple ways, there are countless small but affordable ways to turn a well-used room into somewhere you long to be.



LOTSFÄGEL scented candle in glass, **FEJKA** artificial plant and **GLIMMA** unscented tealights – small touches of comfort for every room



The #1 wish for an ideal home is one that helps you to unwind or relax.

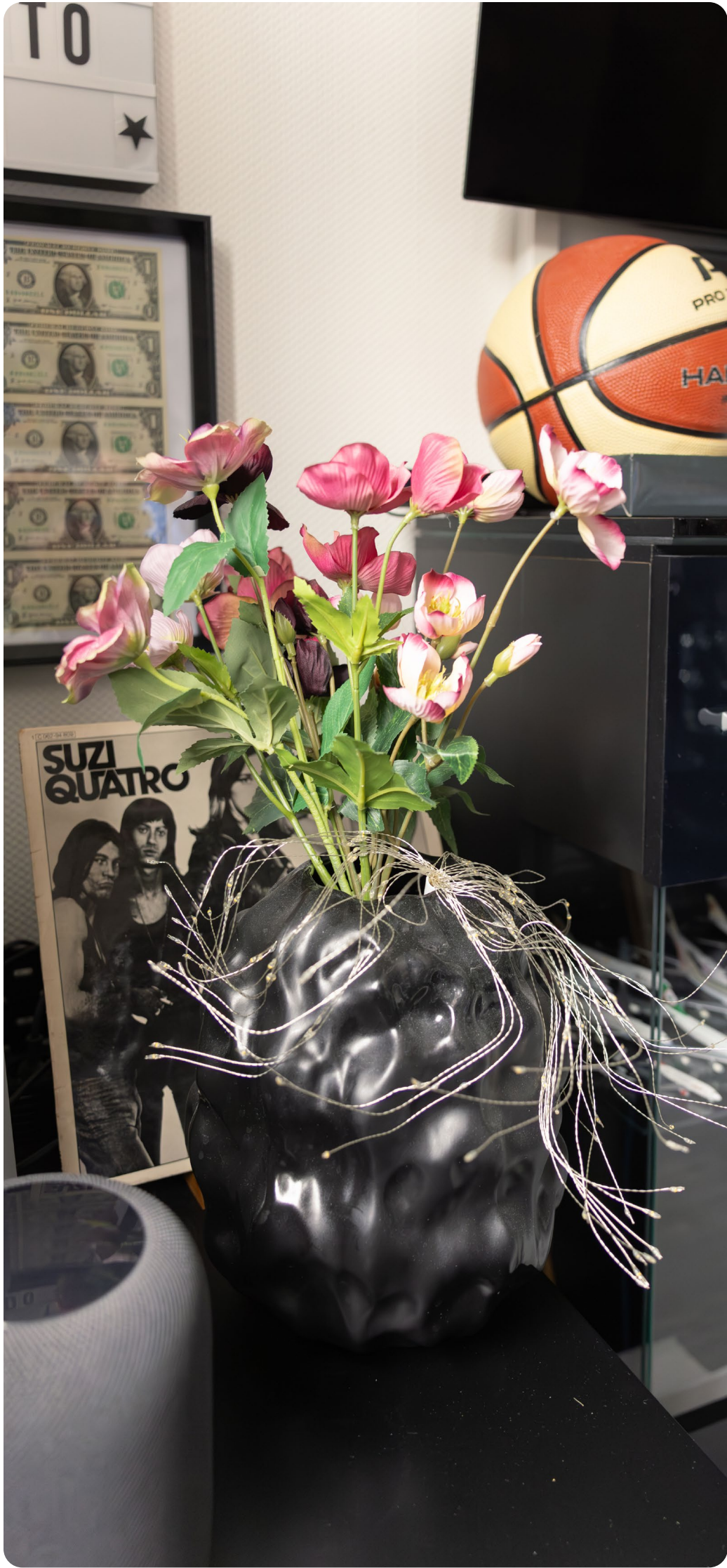
(voted for by 56% of people)

In the driving seat

Feeling in control sits at the heart of life at home satisfaction – it’s an everyday essential and enabler of other needs.

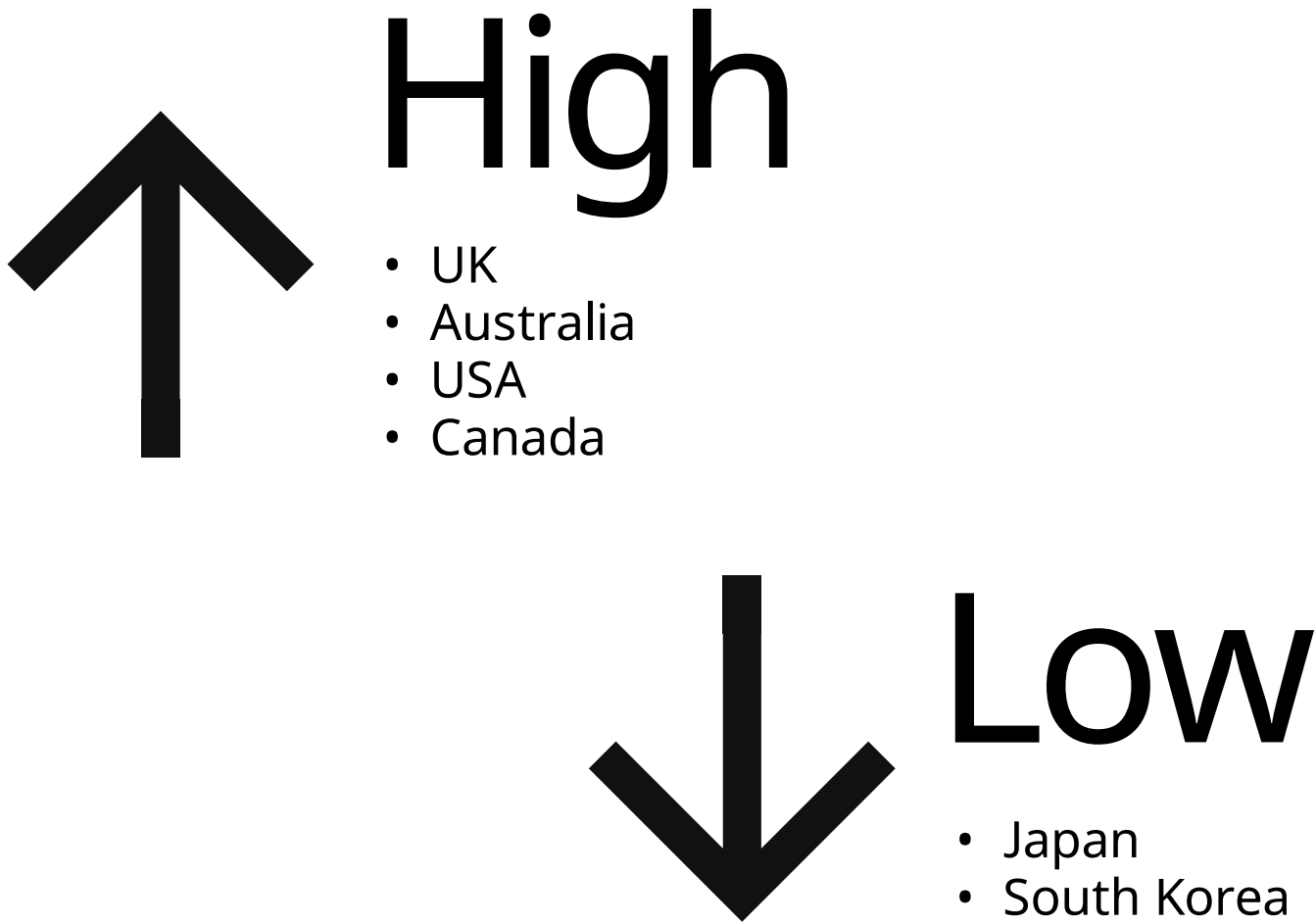
“Think of the big world and the little world: the home is where you have control to recharge, so you can face the big-world changes.”

Kimberly Nicholas



Frank’s home feels like his best friend.

The importance of control



Control is key. Not only to a happy home life, but also to a positive future outlook – as well as a launchpad for other life at home needs.

When the world outside changes at speed, growing ever-more complex and uncertain, control becomes harder to maintain – and moves inward. In times like these, Kimberly Nicholas believes it can help to think about home as a control centre, a “little world ... where you have control to recharge, so you can face the big-world changes”.

Warabi in Japan built his new family home around this instinct to instil order and control: “I tried to

think carefully about storage and organisation,” he says, describing a house where everything has a place and the daily flow just works.

Frank in Germany has lived in his Frankfurt apartment for 30 years: same rooms, familiar rhythms, everything exactly where he wants it. His home, he says, feels like his “best friend”. Control, for Frank, isn’t something you design. It’s something you build over time.

Whether it’s created intentionally or grown slowly over time, that sense of control is worth taking care of.

Behind the controls

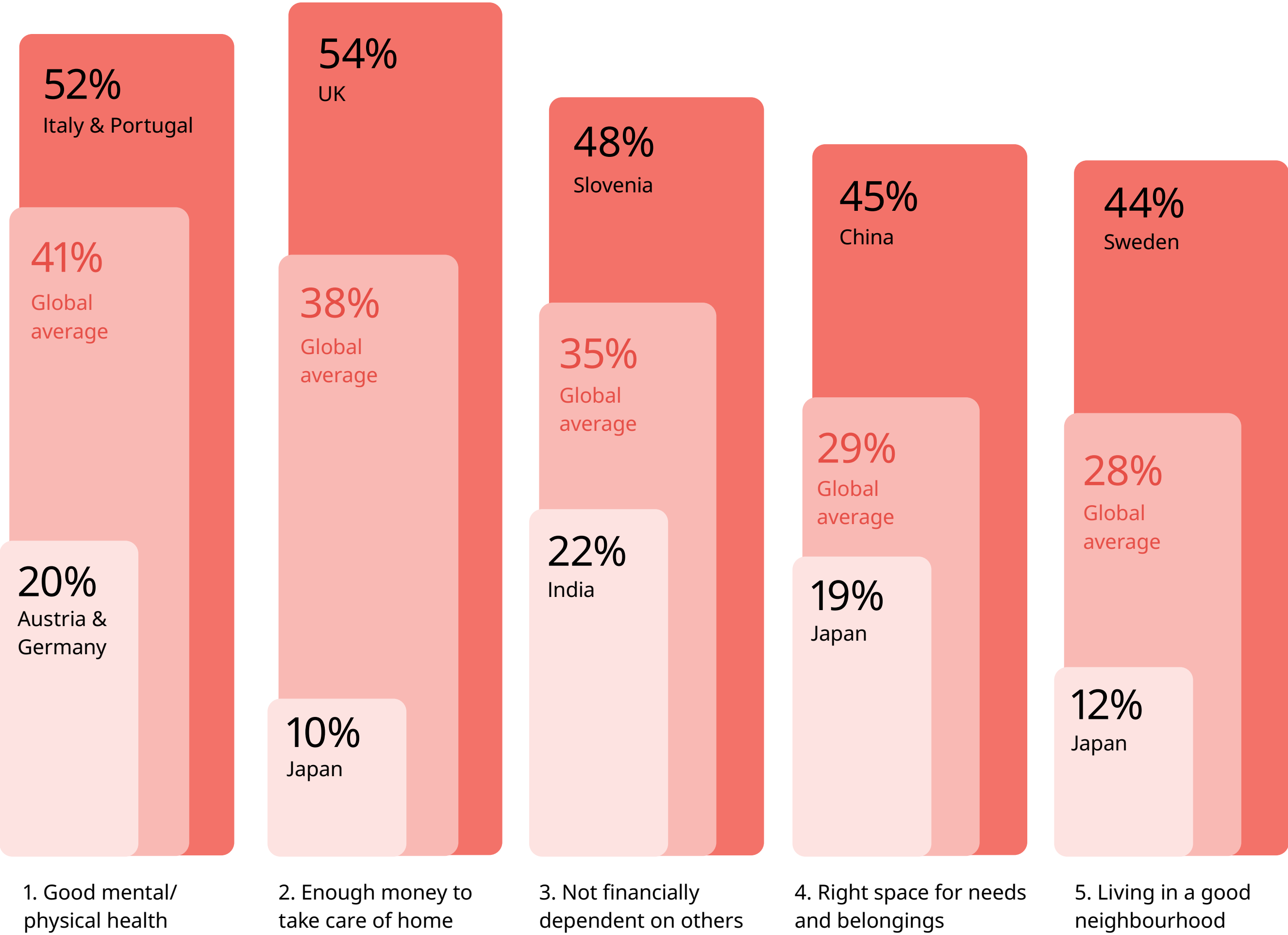
People may rarely be able to control events beyond their front door, but at home they often can. And within the home, they're increasingly clear about what "control" means for them. For 29%, it's having the right space for their needs and belongings. For 20%, it's planning ahead – knowing they've got all bases covered. But look a little closer and the picture gets more nuanced.

Where you live

The top driver of control at home is good mental or physical health – true globally, and specifically in France, Spain, Italy, the Netherlands and India. In Sweden, the UK and the USA, it's financial: having enough money to take care of the home.

Other drivers may be less popular globally, but more relevant locally. In the USA, people are 7% points more likely than average to feel in control through preparing for future events: extreme weather, emergencies, even military conflict. In India, 30% say spiritual or religious practices ground them. In China, 37% point to self-care routines like skincare or hygiene.

Top 5 drivers of control:
highest vs lowest countries





“As a student, you usually only buy enough food for a week.”

Gina in Germany

How you live

After mental and physical health, the second and third biggest drivers of control globally are both financial: having enough money to take care of the home and not being dependent on others.

For house owners, financial control jumps straight to the top. Warabi, who took out a mortgage that runs until he’s 75, thinks about it often: “I do wonder whether I’ll be able to keep up with the repayments,” he admits. For flat-sharer Gina, it’s a different story entirely: “As a student, you usually only buy enough food for a week. There’s just not enough storage space or money to stock up.” An uncomfortable truth for those living in small spaces is that limited space and tight budgets make bulk-buying harder – and with it, the cost savings and sense of preparedness that come with being stocked up.

Finances and control are also very important when you live with a partner. 34% of people living with a spouse or partner say not being dependent on others financially helps them feel in control, compared to 27% of those living with parents.

How old you are

For the youngest adults – Gen Z – mental and physical health is the top driver. With anxiety over climate change and inequality hitting 18-24s hardest, it makes sense: looking after yourself is a tangible action you can take. Gen Zers are also more than one and a half times as likely as Baby Boomers to say self-care routines help them feel in control (25% vs 16%).

For older people, community makes a big difference – over one in three Baby Boomers get a sense of control from living in a good neighbourhood or having a good relationship with neighbours. Like Frank. An early retiree living alone in Frankfurt, he loves the texture of daily contact with others: small talk with a neighbour, a weekly game of boules, his mother dropping by on match days.

➔ **Staying out of control**

Not everyone has a need for control. In Japan, for example, it scores only 64% for importance – 10% points below average. A result of underlying cultural foundations, perhaps? Saori has her own perspective on it: “I think I’m unconsciously avoiding routines so that I can stay open and receptive to things,” she says. “There are incredibly important things to be found in inconvenience, and I hope we don’t end up making things so convenient that we lose that.”



What happens in life

When people see a life change on the horizon, they feel a need to stabilise and prioritise control. For Warabi, becoming a father sharpened his planning skills – from storage locations to how laundry flows through the house. “We thought carefully about the flow of movement and where storage is placed, so that housework is easier,” he says. That instinct is supported by the data: planning ahead jumps 12% points with the birth of a first child.

Other life events shift the experience of what control means. Financial control surges after buying or selling a home, but dips among students. Meanwhile, health is a strong driver of control for recent retirees: 7% points higher than average.

So, while the need for control stays constant, the shape of it shifts depending on the change.

For Warabi, well-planned storage makes for a smoother everyday.

Control through storage

When life outside feels hard to manage, tidying a shelf can feel like a small but spirited act. Not because it solves everything – but because it restores something. “When there is so much noise in the world,” says IKEA interior designer Abbey Stark, “storage and organising your home can help quiet your mind and create space for joy.”

It’s no coincidence that having the right space for needs and belongings is an important driver of control across every age group. The need is universal: from 18-year-olds to 80-year-olds, the numbers barely shift. Maybe that’s why over a third of people around the world are planning to update their storage in the next six months.

Of course, order doesn’t look the same to everyone. “Storage is personal, and customisation is vital,” Abbey explains, highlighting the benefits of adaptable storage designed to change as people’s needs and priorities evolve. Her colleague Queenie Lee takes it further: “In small or first homes especially, smart storage becomes essential to creating physical order, supporting mental wellbeing, and helping people learn to manage life on their own.”

Organising food
Storage also matters beyond the feeling of calm it brings. Storing food properly to keep it fresh for

longer is one of the most meaningful everyday climate actions people can take*, and over eight in ten are already doing it. Perhaps surprisingly, under 30s are playing catch-up here: although they’re generally more concerned about climate change than older age groups, they’re less likely to store food properly or use leftovers. Aspiring to good habits but not always adopting them.

Of course, food storage isn’t just about the tools. “Storage is the tech, but knowledge matters too ... People need to know what should go in the fridge, what food needs to sit in water, and what foods should stay separate,” observes Kimberly Nicholas.

*Project Drawdown

ISTAD food storage bag and **BEVARA** bag clips – keeping food fresher for longer



37%
are planning to update their storage in the next six months



Where we stand

Security, comfort, control. Three of the eight needs that shape a better life at home – and the ones that matter most when the world keeps shifting beneath people’s feet. These aren’t lifestyle preferences. They’re foundations.

And yet for many people, the gap between what they need and what they experience is real. It widens under financial strain. It deepens after a major life change. It falls heaviest on those with the least room for manoeuvre. These gaps show up in small, everyday frictions in all kinds of places

– from an overfull shelving unit to a living area that doesn’t flex.

Actions for change

Home can’t fix the world. But getting it right can change how people move through it. In the next chapter, we look at how people navigate real life changes, what helps them feel ready, and what we can all do to close the gap.



Lessons in life at home: Germany home visit

The small things

A decision that changed everything
– by a twentysomething figuring
out what home needs to do.

Trainee dentist Gina didn't move in with her flatmate by accident. She'd tried living alone – smaller apartment, half the space, all the quiet – and realised it wasn't for her. "I met my current

flatmate at sports," she says. "We hit it off right away." That was two and a half years ago. The decision was simple. And for Gina, it unlocked a richer, more fulfilling home life.



My space, our spaces

In their flat in the university town of Giessen, Gina's room is a work in progress – with personal expression at the very heart of it. She painted most of the pictures herself. Flowerpots made using a 3D printer were painted together with a group of friends gathered round a table, each with a brush. The shelf – a neighbour's cast-off – was also repainted. And the plant in the corner? Sprouted from an avocado pit that she peeled, wrapped in a damp cloth, and waited on. "I think it's really lovely when it eventually grows over the shelf and I can see it from my bed," she says. And if it starts to struggle, she turns to AI to ask what's wrong.

While the walls in her room are still mainly white, they're unlikely to stay that way for

long – she plans to fill them up with more colour and decoration, just the way she likes it. Slowly gaining control, one small decision at a time.

While her room is her sanctuary, a place "where I can be as neat or as messy as I want", the shared spaces – kitchen, bathroom – are another story, run on a simple cleaning schedule and a set of unspoken rules. It works because she and her flatmate both know their part and are happy to play it – even if Gina had to give up on her original plan to label everything when she first moved in. "In everyday life, things got a bit messy. It didn't work out so well," she admits.

"My room is my sanctuary, where I can be as neat or as messy as I want."

It's in the kitchen that the real life happens, of course. A fold-out table that seats ten. Cooking two or three times a week together. The comfort of a warm meal and someone to eat it with. "When you live alone, it's easy to miss having someone to talk to or

share little moments with," Gina says. For her, moving in with someone was all about everyday company. And for now, that part is solved.

Ready for what comes next

Even in this small and comfortable home, though, global pressures can be felt. "It's the current conflicts and wars that really scare me," she admits. Like many young people, she also feels climate anxiety, worrying about the implications of missed climate targets on her future. But her response isn't despair. It's action, small and consistent: a vegan diet, cycling everywhere, second-hand clothes, turning off lights and heating when they aren't needed. "I think every single person can make a big difference," she says. "It starts with the very small things."

Change is coming, and Gina knows it. Many of her classmates are leaving, her dental residency placement won't last forever, and the possibility of a PhD and a bigger city beckon. Whatever happens next, she's open to the new experiences it might bring. A different kind of communal living, perhaps? When it comes



to change – embracing more sustainable living or otherwise – Gina feels it's all about tackling it one step at a time. "Figure out what you really need, and then make small adjustments over time," she advises. And she's already doing it. Wall by wall, plant by plant. Ready enough for what comes next.

For life's explorers, that kind of security – knowing who you are and what you need, with small but meaningful things always close at hand – can be another valuable companion.



Living the change

A place of possibility

In a world that's shifting fast and piling on the pressure, home offers great potential to help.

“Your home is already impacting your wellbeing, whether you realise it or not.”

Michelle Ogundehin



Picture your ideal home. What does it look like for you? For most people, it's a place to relax, be themselves, and do the things they love. But look closer and a more active ambition emerges: a home that supports health and growing families, a place to save money and connect with others.

People aren't just looking for comfort. They want a home that supports them in all kinds of ways. A place that gets them ready for whatever comes next, whatever that looks like. As Michelle Ogundehin points out: “Your home is already

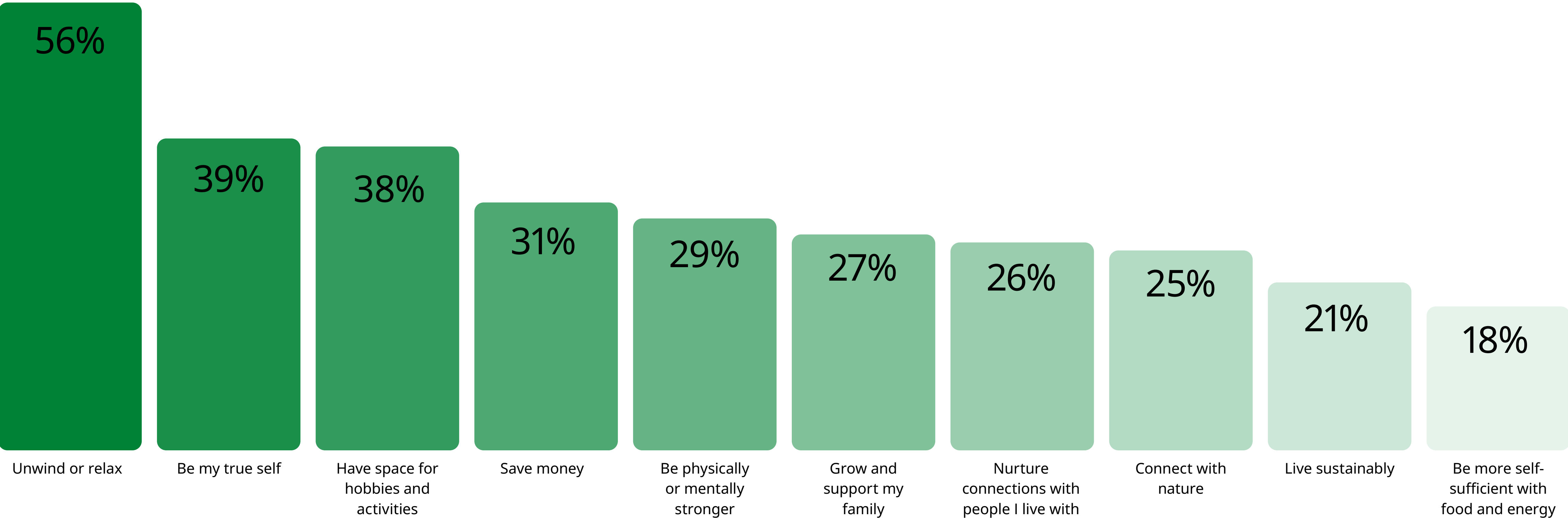
impacting your wellbeing, whether you realise it or not – the backdrop is never neutral.”

Home is at the frontline of resilience. When it doesn't work, hard times feel harder. But when it does, even in small ways, it can change how people see life: their mood, behaviour, capacity to cope.

What home could be

We asked people what would be the most important thing to them in an ideal home. The results indicate how the home might be able to support in times of change.

A home that helps me to...



Actions matter

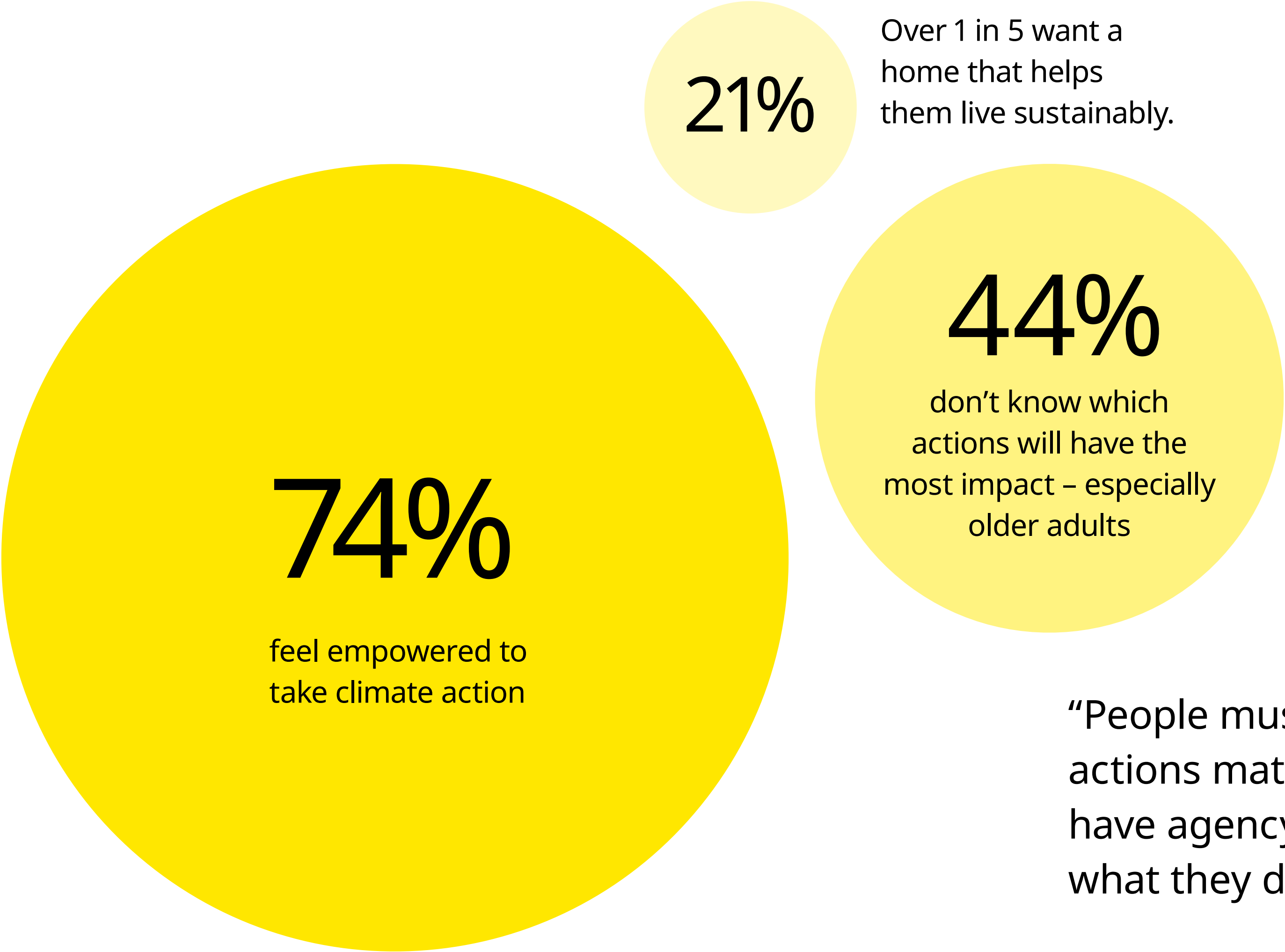
The pressures shaping life at home rarely start there. But small actions at home can have a big impact.

Real change – the kind that shifts conditions for everyone – needs action at every level. Governments setting the right frameworks. Businesses taking action and making better choices easier. People acting in ways that work for them. All three together, doing what’s right for people and planet.

Take climate. Living sustainably is one of the top ten wishes for an ideal home, and nearly three quarters of people feel empowered to take some sort of climate action. At the same time, almost half of those we asked – especially older adults – say they don’t know which actions will actually make a difference.

“For people to act,” Kimberly Nicholas believes, “they must believe their actions matter – that they have agency and that what they do is effective.”

Whatever the challenge, it’s all about action.



“People must believe their actions matter – that they have agency and that what they do is effective.”

Kimberly Nicholas

The role we play

People are ready to act – and they expect businesses to step up, too.

In fact, 65% want significant business action on climate by 2030, while 71% want clearer communication on companies' environmental and social impact.

With our size and reach, we at IKEA have a big responsibility – and many opportunities – to play our part in tackling climate change, nature and biodiversity loss, water scarcity and human rights. While recognising that most things still remain to be done, we're stubborn optimists who believe that we can create a better future.

As an expert in life at home, we can inspire consumers and customers to live a more sustainable life. But that can't be a luxury for the few. That's why we make our home furnishing products, services and solutions affordable, attractive and accessible for as many people as possible – no matter the size of their wallet.

Read more at [Sustainability](#) | [Ingka Group](#)



How we're making action easier

with IKEA home furnishing experts Queenie Lee and Abbey Stark

Multifunctional products

"It's always good to buy smarter," says Queenie, "and at IKEA, we design furniture for multiple uses so it can adapt as life changes. Even if you don't need every function immediately, these products grow with you, reducing the need to buy new items over time."

Modular furniture

"Flexibility is the new comfort," says Queenie. "Our modular systems are made to flex with changing homes and lifestyles. You can add to them, split them, or move them to a different room rather than starting from scratch."

Circular services

"Through services like buyback and resell, the second chance area and second-hand marketplace, we help you keep products in use for longer – and

make it easier to choose well from the start," says Queenie. "People need to see that others are already doing it."

Energy, water and waste efficiency

"Minor updates can make a big impact," says Abbey. "Our range includes blinds and curtains to regulate heat and light, plus taps for efficient water use – as well as reusable food storage to help cut waste, and kitchen waste systems for easy recycling and composting."

Democratic Design

"Sustainability – including reuse, repair and recycling – is built into the way we design, alongside form, function, quality and low price," says Abbey. "In our stores, we highlight what sustainable living actually looks like: practical, affordable and beneficial for everyone."



"Minor updates can make a big impact."

Abbey Stark

Doing more

As we’ve seen, the vast majority of people are already taking some action on climate change and are willing to do more. But what’s driving them to act and what’s standing in the way?

Money plays a big part, with 41% finding cost a barrier to climate action. Additionally, those under financial pressure are 16% points more likely than average to say that their situation limits them to smaller purchases for the home. And yet, effective actions don’t have to be expensive. Kimberly Nicholas suggests “small household routines – meal prep, drying clothes on a rack, planning ahead” as examples of affordable and achievable ways to live more sustainably at home.

Every coin has two sides, of course. While price is preventing four in ten from doing more to help reduce climate change, saving money is an incentive for over half of people to act – the number one motivator, in fact. In other words, a more sustainable action that cuts costs is desirable for most. Another strong reason for action, after saving money and knowing the impact of your efforts, is health – your own or that of your family. Older adults and people on high or middle incomes are most likely to be motivated by the effect of a sustainable action on their wellbeing.

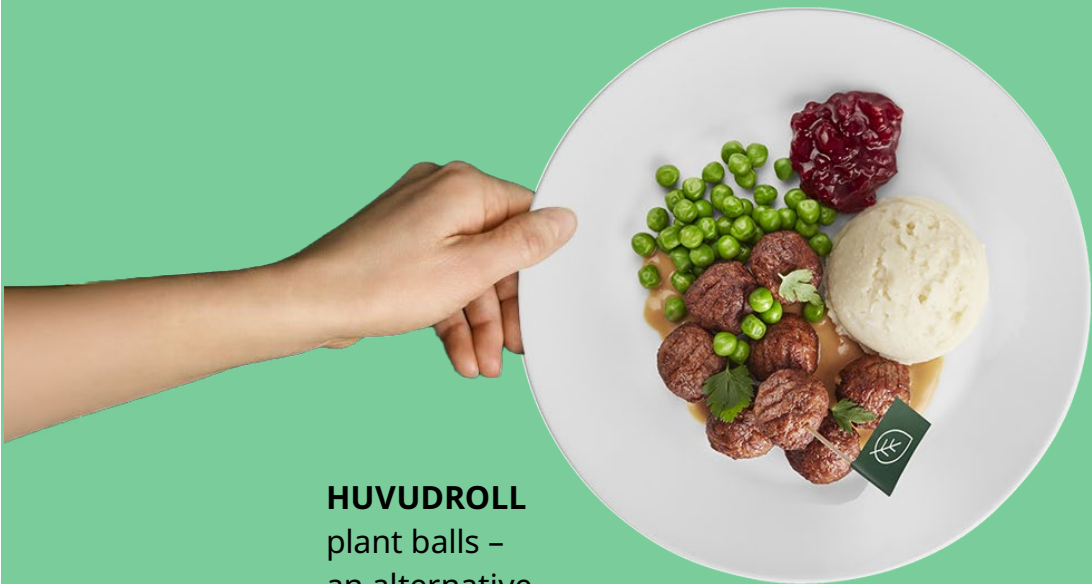
So, how might people engage in more of these actions to enjoy a healthier, more sustainable and affordable everyday? A few home truths might help – which is what the next page is all about.

Top 5 motivators for climate action



Small but mighty: 5 home truths to make a difference

Many of the most effective everyday actions in the household are also good for your health and your wallet. Here are our top five tips.



HUVUDROLL
plant balls –
an alternative
to meat

Insights on the most effective actions for individuals to address climate change courtesy of [Project Drawdown](#).

Eat more plants

A plant-rich diet is good for the planet, your wallet and your health. And yet, only 15% eat vegetarian or vegan food regularly. Once or twice a week can still make a difference.

Rethink energy

74% are already using energy-efficient lighting – that’s a bright note. Smart tech is also gaining ground, now helping 26% to manage their energy use.

Give furniture a longer life

70% are repairing, selling or donating unwanted furniture – keeping pieces in circulation at their highest value for as long as possible.

Get out into the community

Neighbourhood involvement is on the rise and those who enjoy helping in their community are 9% points more optimistic about the future. Local action is a win-win.



➔ **Store and save**
82% say they store food properly to keep it fresh for longer – and avoiding food waste is one of the most meaningful climate actions there is. For Gen Z, the habit hasn’t quite stuck yet.

Lives in transition

Some of the biggest changes faced at home aren't about the world outside – but life itself. But what lessons can be learned from them?

The actions people take in their homes are also shaped by the defining moments in their lives. From starting out or turning the page to coping with loss or setting off into the unknown, major life events don't just shift circumstances. They play a huge part in what people need at home and what they can do about it.

Reassuringly, as life changes, home can change too. "You're allowed to change your home," says Michelle Ogundehin. "People often think that once you've updated it, you're done. But you're not. You're changing, life is changing, the world and seasons are changing. We should empower people to move furniture, paint walls, switch up lighting, and shift things around. Your home can evolve with you, and even tiny changes can make a big difference."

Queenie Lee agrees, highlighting the potential of home furnishings to help people keep up with change: "In moments of change, furniture

becomes a tool for emotional renewal – helping people create spaces that reflect their new chapter in life. We need home furnishing solutions that get people ready not just for today, but also tomorrow."

On the pages that follow, we look at four broad life change themes and how home can help in preparing for them:

- ① Building home
- ② Stepping back
- ③ Into the unknown
- ④ A new chapter

Of course, life is rarely linear and always varied. These themes are just examples of the many different twists and turns people experience during the course of their lives. But still, they house recognisable patterns – and some valuable lessons within.

"You're changing, life is changing, the world and seasons are changing ... your home can evolve with you."

Michelle Ogundehin

① Building home

Home building is about life's firsts, from moving in to welcoming a baby or a pet. Moments that call for a new kind of stability, which the home can support.

"First-timers" like these are significantly more optimistic than most. But with a fear of financial instability undermining their new situation, they need affordable, durable ways to build their sanctuary.

Michelle Ogundehin encourages first-timers to prioritise security and flexibility through modular storage, adaptable layouts and safe sleeping environments. "It's about anticipating change rather than reacting to it," she says. Not so much a home that looks finished, but a home that feels ready.

For Kimberly Nicholas, bigger isn't better – it's more about making the space you have work for changing needs. "Don't 'move up' to more space by default," she says. "Staying in a smaller, well-organised home can cut footprints and bills." On running costs, 17% of people about to improve their home are planning energy-efficiency updates like solar panels, insulation or upgraded windows.

For first-timers, the goal isn't more square metres. It's a home that grows with them.



Warabi the first-timer

Changes at home

- Modular storage and adaptable layouts
- Safe sleeping environments
- Small and well-organised spaces
- Energy-efficiency improvements

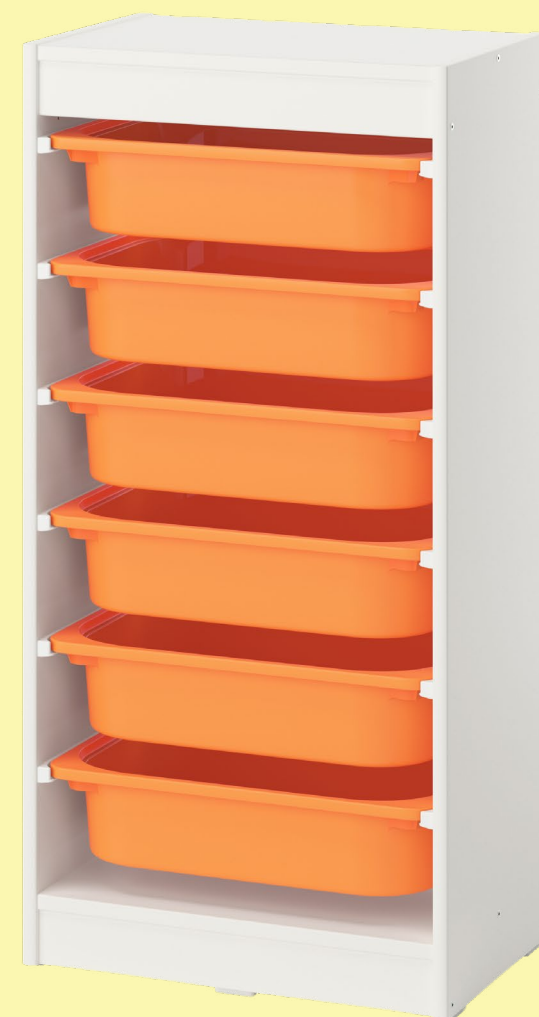


Needs at home

- Security matters. Feeling secure peaks in importance for many first-timers – after moving house, for instance.
- Smaller control gap. Building is about getting things ready, which brings a sense of control. Homeowners feel it most.
- Comfort = emotion. Comfort at home is less about place, more about people – especially for new parents.

Home furnishing tips for first-timers

with Abbey and Queenie



TROFAST storage system – for organising toys or dividing a room



One piece to start it all

Think about the one thing that lights you up that you can gradually build your home around. Maybe it's a smaller item like a beautiful vase, or a larger one like a patterned sofa. What could that one piece be to start it all?

Don't forget the parents

When people think about new babies coming home, they think of solutions tailored to the baby – like a new crib. But what about the needs of the parents: how can me-time moments or armchair slipcovers improve their life at home?

Less chaos, more time

When life is chaotic and time is short, how can you benefit from softer, safer and more practical spaces with smart storage? Think about flexible furniture that allows you to flip the space from playroom to dining space in minutes.



Júlia the
regrouper



Needs at home

- Security takes a hit. Large security gap, especially after a relationship ends or a job is lost.
- Control is slipping. A sizeable control gap that peaks for those who’ve moved back in with their parents.
- Big comfort gap. Hits hardest after a relationship ends – when human closeness has been lost.

② Stepping back

Loss takes many forms, from the end of a relationship or job to a bereavement or finding yourself back in the family home. What these moments share is the need to regroup and find solid ground again.

Those going through loss feel less positive about their life at home, with larger gaps between what they need and what they experience – especially after ending an intimate relationship or moving back home with parents.

Michelle Ogundehin’s advice to “regroupers” like these is to stabilise the self first. “That could mean reclaiming one room or space as your secure anchor,” she says, “and then focusing on routine and ritual before launching into big aesthetic upgrades.” Small changes, not big overhauls.

Even the quickest changes can transform how a space feels. Of those planning to renovate, people who have recently ended a relationship are more likely to turn to fast, low-cost resets like repainting walls or adding new cushions. A tidy, organised home helps with that kind of loss, too: over half say it makes them feel content and at ease.

For those who’ve moved back in with parents, privacy and acoustic fixes can ease the adjustment. With mental health concerns notably higher during this type of change, warm lighting and soft textiles can provide emotional grounding and soothe the nervous system – not just decorate.

Changes at home

- Low-cost surface updates – paint, cushions, textiles
- Organised storage and decluttering
- Acoustic and privacy solutions for shared living
- Soft furnishings and warm lighting

Home furnishing tips for regroupers

with Abbey and Queenie

Be kind to yourself

Think less about big overhauls, but more about the small things that can help you feel more comfortable in your home. Affordability is key, especially if you've lost a job or there's one less income in the household. Start small and find little ways to be mindful and kind to yourself.



POÄNG armchair
– classic comfort
that's easy to adapt



Zen zones

In times of loss or reflection, comfort is key. How can you create a safe space to pause, breathe, and slowly move forward again, using cosy textiles, calm colours and soft lighting?

Keep memories alive, or give yourself space

People have different ways to cope with loss. Some find comfort in seeing reminders, others need distance from them. What if shelves let you display what you want to remember, while flexible storage lets you tuck things away when you need a break?

③ Into the unknown

Starting university, moving abroad, taking a gap year, leaving the parental home for the first time – these are moments of stepping deliberately into the unfamiliar, with curiosity rather than caution leading the way.

This is usually a time of optimism, with those living in halls of residence more positive about the future than most. And despite being on the move, the need for self-expression isn't forgotten. Almost two in five of those who've recently taken a gap year want a home that lets them be their true self – the same as the global average – while 46% of those who've moved out of the parental home want space for hobbies and activities, which is well above the norm.

For “explorers” like these, Michelle Ogundehin points to the personal objects that travel with us:

“Maybe it's a journal, photos of loved ones, or even the childhood toy that we might be a little embarrassed by, but means a lot to us.” Things that are portable. Things that say: this is who I am, wherever I am.

In these moments, the home is rarely permanent and often small – but that's no reason to leave it unexpressed. Of those planning to renovate, people who've recently started university are most likely to be planning minor redecorations. Kimberly Nicholas reminds explorers to “make the journey part of the joy: trains over planes, local adventures, homes that flex with you”. It can also be a great time to explore second-hand options. Flexible, renter-safe changes – low cost, low commitment, low footprint – can make even a temporary space feel like your own.

➔ Needs at home

- Narrower security gap. Especially for those in halls of residence. Investing in your future is reassuring in itself.
- Less control, more carefree. Less interest in control – especially for those who've moved abroad.
- Comfort matters less. Comfort importance dips – as expected for people stepping out of their comfort zone.



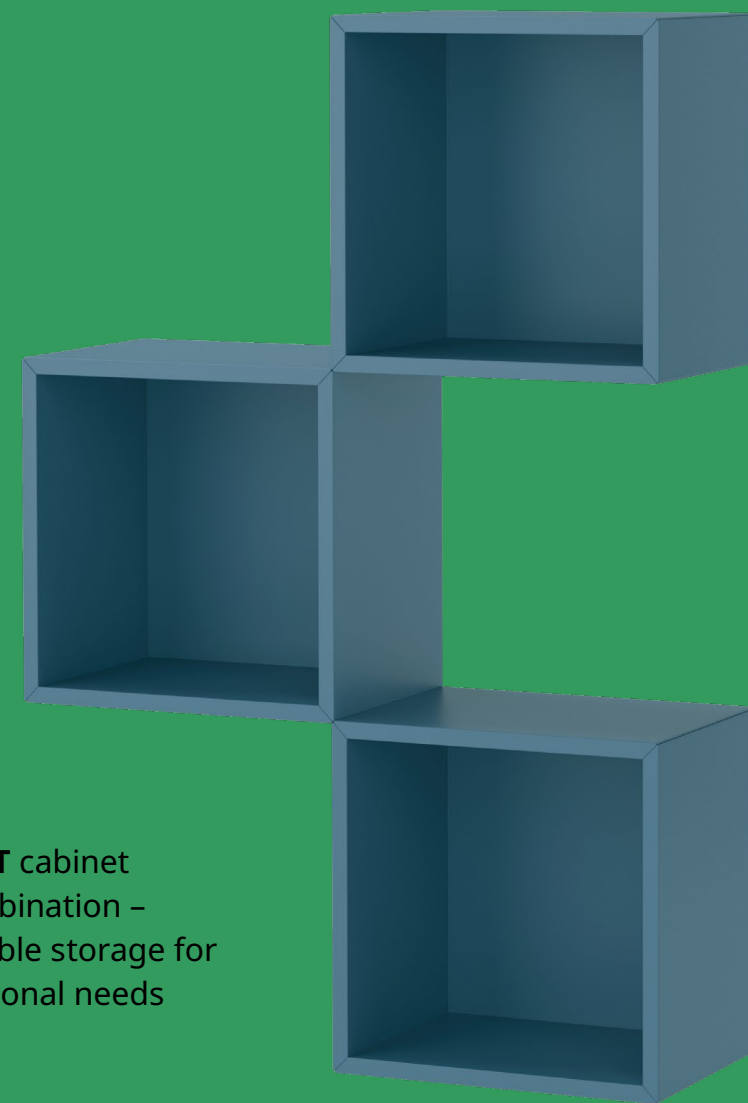
Changes at home

- Flexible layouts and storage for self-expression
- Space for hobbies and activities
- Small, personal objects that carry identity
- Low-cost, renter-safe fixes – including second hand

Gina the explorer

Home furnishing tips for explorers

with Abbey and Queenie



EKET cabinet
combination –
flexible storage for
personal needs

Flexibility first

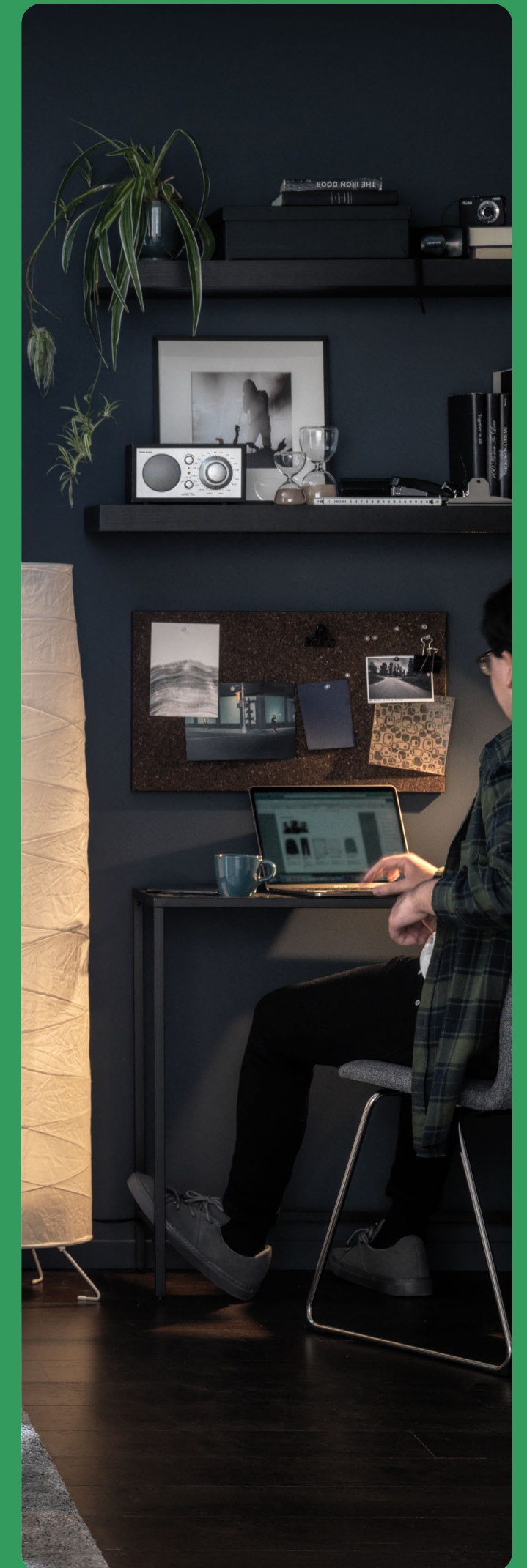
In times of exploration, people often live in smaller, temporary spaces. How can you get smart, flexible storage that isn't just practical but also looks good? Find a compact solution that can travel with you.

Take a piece of home

People on the move often need to be choosy about what to take with them. How can home furnishings help create a sense of belonging and stability, even in new environments – while also supporting independence, creativity and adaptability? What small, meaningful things can you take with you?

No living room? No problem.

Moving into dorm rooms or small spaces without designated living rooms requires a different approach to creating the all-important living space – converting a bed into a sofa with cushions against the wall or using the laptop tray for dining, for instance. How can you rethink the classic living room rules?



④ A new chapter

Retirement, an empty nest, a home reimagined for what comes next. These are moments when people turn a page, reprioritise and rediscover. When parts of themselves that got set aside start asking for space again.

Michelle Ogundehin explains: “It’s often about reclaiming bits of our identity that got lost – people who’ve poured so much into their children that they’ve neglected their creative hobbies, and now they’re creating space for those to exist.” Indeed, plans to renovate rise sharply at this stage: those whose children have started university or recently married are among the most likely to improve rather than move.

For “page-turners” like these, the home itself changes shape. Old rooms get repurposed: for

hobbies, wellbeing, guests. And the boundaries of home expand outward, into community and nature. Recent retirees, for example, are 4% points more likely than average to point to helping out in the community as a hobby, and to say that an ideal home helps them nurture connections with people in their community or connect with nature. For empty nesters, a furry friend often fills the space a child left behind: they’re 11% points more likely than average to have one or more pets at home.

Kimberly Nicholas reframes what control means when starting a new chapter: “Redefine control as health – light, air, sleep and movement become core infrastructure at home.” That extends to the fabric of the home itself: ergonomic furniture, good lighting, and spaces designed around health and movement rather than just aesthetics.



Needs at home

- Security eases. Importance dips as priorities shift – those in later life stages feel more secure.
- Control: needed, but redefined. Less about order, more about health, light and movement.
- Comfort on the rise. In a changing household, comfort becomes more important to those who stay.

Changes at home

- Rooms repurposed for hobbies, wellbeing and guests
- Pet-friendly spaces
- Access to community and nature
- Ergonomic, health-supportive furniture and lighting



Saori the page-turner

Home furnishing tips for page-turners

with Abbey and Queenie



RÅSKOG trolley –
a trusty companion
for hobbies or
socialising

New chapter ready

It's time for your home to be all about you. What are the things that make you light up? Don't be afraid to try that new paint colour or texture.

Reclaim spaces

Retirement or children leaving home can be an opportunity to reset and reimagine a space to work just for you. How can you refresh an old space with new priorities like hobbies, relaxation or socialising in mind?

Clearing out is in

Now's the time to reassess your priorities. What are the things you really need and want inside your home? Get ready for a clear-out. Not only is it good for the soul, but it's also a great opportunity to pass on those well-loved but unneeded items to family, friends or neighbours. Or maybe even sell them for some extra cash?



Where we stand

Around the world, people are living through change – and home is where they feel it most. This chapter has looked at what that means in practice: the small, meaningful actions that can make a real difference to life at home, and four broad life change themes that shape what people need from it.

People want more than just shelter from their home. A place to unwind, yes – but also to save money, grow a family, live more sustainably, be more self-sufficient. And many of the household actions that move the needle on sustainability

are also good for health and good for the wallet. Flexible furniture, adaptable storage and multifunctional solutions can help people grow into new life stages without adding pressure – or cost.

The next step

Understanding how people's needs shift across life's big moments, and how they respond to them, is the first step to being ready for change. The next? Making sure the conditions are in place for everyone to act – at home, and beyond.



Lessons in life at home: Japan home visit

We've prepared for it

A multipurpose home renovated for the long term – and everything that brings.

Located in a quiet area of Saitama Prefecture and surrounded by fields, Saori and Kenta's home is thoroughly, unmistakably theirs. But this isn't a story about a couple finding their dream home. It's about seven people deciding to build a life together. Alongside Saori, Kenta, their teenage daughter Sono and their two cats, live Saori's parents – as well as her father's older brother and his wife, in a connected adjoining space. And next door: the confectionery shop that brought them here.

The long way round

For years, Saori and Kenta ran five rented confectionery shops across Saitama City. Then came COVID-19, exposing the risks of rented premises and long staff commutes. Realising they needed to make a change for

their finances and health, they spent two years looking for a property where they could bring the family together across generations and integrate a shop, while gradually winding down the other businesses.

“From the start, the plan to live as a multigenerational household was the one fixed point.”

“From the start, the plan to live as a multigenerational household was the one fixed point,” Saori says. What changed was everything around it. Saori describes that period

as “a daily battle with anxiety”. Kenta's repeated reassurance back then: take it one step at a time.

The house they eventually found – a large second-hand property along the Edogawa River – became the vehicle for everything they'd been working towards. They renovated, rebuilt, and connected a neighbouring space. “Since we moved into this house, home has really become number one,” Saori says. Kenta goes into more detail: “The further you are from home, the more stress you're under. I want to minimise that as much as possible. Which is why we've chosen this lifestyle.”

Adapting to life

Bringing multiple generations under one roof takes more

than goodwill. It takes serious planning. Wide custom doorways, flat exits, a shared rehabilitation room: these weren't features the family needed on move-in day. But they built them anyway, to lessen the load of ageing and ill health. “We haven't said it outright,” Saori says, “but we've prepared for it on our end.”

As well as a shop and a place to live, the home is also a workspace, an event space and a community hub – with no hard line between any of them. The living room gets rearranged seasonally: a *kotatsu* (low table with a heat source) in winter, a lighter set-up in summer, extra chairs pulled from the crawlspace when events bring people in.

Ever practical, Kenta prefers furniture without too many distinctive details, so pieces move easily between the shop and home without looking out of place. Saori values both light and sturdy pieces, but above all versatile ones. The sofa that switches left to right depending on the season, for example, or the dining table that became an event table, then a work surface after she cut the legs down herself.



Waste and friction

What's striking about how Saori and Kenta live is how practical and unsentimental it all is – in the best way. As one of the main cooks, Kenta follows a simple guiding principle: use what's about to go off, always. Between the house and the shop, almost nothing is wasted on either side. Saori carries the same instinct into the home set-up – rooms that flex for different seasons, different occasions, different needs. “A home that can't do that,” Kenta says, “is not an ideal home.”

Working in change management, Saori worries that AI and the need to do things quickly and easily is making us miss important details. That's why she looks for discomfort

as a trigger to change things at home. If someone's holding their arm to support their head while watching TV, is it because of the chair, the angle or the distance? “There are incredibly important things to be found in inconvenience,” she says. The friction tells her what needs to happen next.

In the years to come, Saori and Kenta will turn many more pages and start countless new chapters – all with their own kind of friction. The community cats will come and go. Sono will leave eventually. The family members' needs will shift – in some ways that are impossible to predict, in others that are just as planned. Whatever comes next, they've built their home to meet it.

The last word



The future of home

Home at its best feels effortless – “something you inhabit almost like a second skin,” as futurist Julian Bleecker puts it. But as living spaces grow more complex, and the world more turbulent, he stresses the importance of keeping homes light and comfortable.

“In a world that’s becoming more volatile and unpredictable outside our front doors, we still want the home to deliver control, comfort and security without adding new layers of burden.

As homes become more instrumented and more systems need governance and maintenance, finding that balance becomes one of the biggest challenges and opportunities for the future of the home.”

Home at the ready

In an era of socio-political uncertainty, accelerating climate change and rapid technological shifts, many people's everyday lives are feeling the impact of global developments. When those same forces get tangled with people's own life transitions, it reminds us that while change is constant, it's also deeply human.

Home has always played an essential role for individuals, families and communities – a central anchor to hold them steady. Within the current landscape, with the meaning of home disrupted for so many, its importance comes even more sharply into focus.

The eight needs for a better life at home offer a helpful framework for navigating change. In turbulent times, the everyday essentials of control, comfort and security matter even more. Yet we also recognise that many of the pressures people face today – financial, environmental, societal – go beyond what home solutions alone can address.

Still, people are finding new ways to meet their needs, adapt, and build resilience. In this context, control plays a supportive role – not as a solution to global uncertainty, but as one of the small, grounding tools that help people feel steadier

and more capable from day to day. The same goes for security and comfort – basic needs that, when fulfilled, can help people move forward in uncertain times.

Understanding these needs is only the starting point. At IKEA, we have both an opportunity and a responsibility to support people around the world as they navigate change. People are clear on this: they expect businesses to make sustainable choices more accessible, communicate impact more clearly, and act on inequality and supply chains. We need to focus on making action easier, not asking people to do more. By helping people create a better life at home today, and for tomorrow, we can support them in preparing for change. Embrace it, even.

Because no matter how much the world changes, home is where the heart is. And that's where the preparations start. Piece by piece.

Let's get ready for life – at home.



PS

Explainers

Wondering what a certain word or phrase means, or how a key demographic is broken down? These essential explainers are here to help.

→ Needs

Eight needs framework

When we talk about needs, we’re referring to the IKEA eight needs framework: a model of people’s emotional and functional needs based on 11 years of research, that helps us understand what makes a better life at home. The eight needs and their definitions are as follows:

Our everyday essentials:
Security: The fundamental elements are in place for you to feel safe and secure in your life at home.

Comfort: That you can create

a home that makes you feel content and relaxed.

Control: The feeling that you’re in control of your home, what goes into it and how it’s used.

Our regular connections:
Nurturing: That you can connect with yourself and take care of your mental and physical wellbeing.

Belonging: That you’re accepted for who you are by the people that you live amongst and in places that reflect you.

Our meaningful moments:
Enjoyment: Having uplifting moments of appreciation or joy that give you warmth and happiness.

Accomplishment: Having a sense of pride and progress by achieving your goals or tasks.

Our future plans:
Aspirations: That your life at home enables you to think and

feel positively about your future.

→ Breakdowns

Life stages – YouGov

Pre-family: People under 45 years old without children

Young family: People with children living at home younger than 7 years old

Adult family: People with children living at home between the ages of 7 and 17

Active empty nesters: People older than 45 working without children living at home

Senior citizens (Inactive empty nesters): People older than 45 not working without children living at home

Generations – YouGov

- Generation Z: 18-29 years old
- Millennials: 30-44 years old
- Generation X: 45-60 years old
- Baby Boomers: 61-79 years old

Income levels – YouGov

Lower income: Less than 75% of the median*

Middle income: Between 75% and 200% of the median*

Higher income: Higher than 200% of the median*

*Median income per country – the income amount that divides a population into two groups: one half with an income above the median, the other half with an income below it.

→ Terminology

Research, insights and trends

Quantitative and qualitative research are two methods of collecting and analysing data.

Quantitative data relates to numbers and amounts, is easily measurable, and can be analysed mathematically and statistically.

Qualitative data is non-numerical and descriptive,

based on people’s opinions and feelings, and used to understand the in-depth meaning behind something.

An insight is an interpretation of data and observations from quantitative and qualitative research.

A signal of change is an observation of an innovation, ideas or behaviours that might have a future impact – either a discreet instance of change or an observation that supports a more recognisable trend.

A trend is a measured pattern of signals that share common characteristics and attributes, often showing a change in quantity or magnitude over time.

Statistical terms

Global average signifies the average, or mean, answer to a certain question by all respondents, in all countries surveyed. When describing

a specific insight in relation to a global average, “more likely” means above average, while “less likely” means below average.

Percentage points (% points) are the absolute difference between two percentages (e.g. 1% point difference between 2% and 3%).

Percent (%) is a change or difference expressed as a percentage of the original value (e.g. 50% increase from 2% to 3%).

Detailed data

Here it is, the detail behind all the data. Section by section, in chronological order – just as it appears in the report.

Research source in brackets:
YG = YouGov; GS = GlobeScan

→ Chapter 1: Life in motion

The way the world turns

Life at home concerns 2024 vs 2025: household finances and disposable income up from 35% in 2024 to 37% in 2025; my physical health up from 35% to 37%; the current state of the economy in my country up from 29% to 31%; that I spend too much time using screens up from 19% to 20%. (YG)

45% of people feel personally impacted by climate change. 64% of people worry about climate change. 61% of people worry about inequality. (GS)

48% of people feel positive about the future (the next two years) and 29% feel neither positive nor negative. 53% of those who have experienced a life event in the past year (good or bad) are optimistic about the future – vs 48% global average for future outlook. (YG)

Same world, different story
Same data as previous section, plus:

Top 5 life at home concerns: my household finances and disposable income 37%; my physical health 37%; the current

state of the economy in my country 31%; the health of people around me 30%; my mental health 28%. (YG)

Life at home concerns 2024 vs 2025: the current state of the economy in my country up from 29% in 2024 to 31% in 2025; my mental health up from 26% to 28%; increasing divisions in society up from 18% to 20%. (YG)

83% of people report taking some climate action. 81% of people are willing to do more to help reduce climate change. 69% of people are taking some action to help address inequality. (GS)

A bigger picture

Society at stretching point
Worry about inequality: global average 61%; LGBTQ+ community 77%; marginalised religious groups 74%. (GS)

47% in Romania and 46% in the UK say the state of the economy is a top concern, compared to just 11% in Denmark. (YG)

69% are taking some action to help address inequality. 54% say

saving money would encourage them to take more action to help reduce climate change. (GS)

A planet under pressure
19% of people globally, and 33% in China, say extreme weather events affecting their home are a top life at home concern. (YG)

83% report taking some climate action and 81% are willing to do more to help reduce climate change. Barriers preventing people from taking more climate action: cost 41%; not knowing what will have the most impact 44%; lack of government support 46%. (GS)

57% of those who feel their home allows them to live sustainably are positive about the future – vs 48% global average. (YG)

Keeping up with tech
In 2025, a top concern for 20% is that they spend too much time using screens. (YG)

Under 30s are more likely to use smart technology to save energy. (GS)

Bringing change home

Ready to respond
If you are happy with your current life at home, you are more likely to be optimistic about the future (65% vs 48% average). (YG)

Net positive future outlook (the next 2 years): people who have purchased their first home recently 70%; experienced the birth of their first child 69%; experienced the loss of a close friend or family member 46%; recently retired 41%; global average 48%. 12% of people have experienced the loss of a close friend or family member in the past year. (YG)

“It is important that an ideal home helps me to be my true self”: pre-family life stage 41%; young family life stage 32%; global average 39%. (YG)

Life at home concerns Gen Z (GZ) vs Baby Boomers (BB): the current state of the economy in my country GZ 27%, BB 35%; that I spend too much time using screens GZ 32%, BB 15%; my mental health GZ 36%, BB 20%; my physical health GZ 28%, BB 48%; the relationships with those around me GZ 21%, BB 15%; increasing divisions in

society GZ 14%, BB 27%. (YG)

Concern about the relationships with those around me: people in co-living facilities 28%; those who own their apartment 16%. (YG)

Worry about climate change: 18-24 years 67%; 25-44 years 65%; 45-64 years 63%; 65+ years 65%; living with children 68%; not living with children 63%; global average 64%. (GS)

“It is important that an ideal home helps me to live sustainably”: apartment owners 24%; living in college/university hall of residence 10%. (YG)

Feeling positive about current life at home: those who say their home enables them to live sustainably 75%; those whose home helps them bring out their playful side 77%; global average 63%. (YG)

➔ Chapter 2:
Needs at home

Never more needed
(all YG)

The eight needs – importance

over time (2023/2024/2025) and top countries: Security: 77%/79%/82% (top country: Finland 90%); Comfort: 80%/81%/86% (top country: UK 92%); Control: 70%/71%/74% (top country: UK 83%); Nurturing: 76%/76%/81% (top country: Romania 86%); Belonging: 71%/70%/73% (top country: China 85%); Enjoyment: 80%/80%/83% (top country: China 88%); Accomplishment: 71%/71%/74% (top country: Portugal 85%); Aspirations: 71%/70%/73% (top country: China 83%).

Essential needs importance by region: Security is important to me: North America 86%, Asia 82%, Europe 81%, Pacific 85%; Comfort is important to me: North America 90%, Asia 83%, Europe 86%, Pacific 87%; Control is important to me: North America 80%, Asia 67%, Europe 74%, Pacific 78%.

The more frequently people feel their needs are met at home, the better they feel about life there – both now and in the future:

Share who have a positive feeling about life at home, split by their frequency of fulfilment

of each need: Frequency of security: often 73%, sometimes 45%, rarely 35%, never 39%; Frequency of comfort: often 75%, sometimes 48%, rarely 28%, never 24%; Frequency of control: often 74%, sometimes 55%, rarely 39%, never 37%; Frequency of nurturing: often 76%, sometimes 58%, rarely 37%, never 29%; Frequency of belonging: often 75%, sometimes 56%, rarely 39%, never 30%; Frequency of enjoyment: often 78%, sometimes 56%, rarely 28%, never 22%; Frequency of accomplishment: often 79%, sometimes 63%, rarely 39%, never 25%; Frequency of aspirations: often 80%, sometimes 63%, rarely 39%, never 24%.

Share who have a positive outlook on the future, split by their frequency of fulfilment of each need: Frequency of security: often 55%, sometimes 34%, rarely 29%, never 29%; Frequency of comfort: often 55%, sometimes 38%, rarely 28%, never 23%; Frequency of control: often 54%, sometimes 42%, rarely 33%, never 28%; Frequency of nurturing: often 56%, sometimes 43%, rarely

31%, never 26%; Frequency of belonging: often 56%, sometimes 43%, rarely 32%, never 23%; Frequency of enjoyment: often 59%, sometimes 41%, rarely 24%, never 19%; Frequency of accomplishment: often 61%, sometimes 46%, rarely 28%, never 18%; Frequency of aspirations: often 63%, sometimes 46%, rarely 26%, never 17%.

The eight needs: importance over time
Same data as previous section.

Back to basics

The bare essentials
82% find security important (vs 79% in 2024 and 77% in 2023) and 68% say they experience it often. 86% find comfort important (vs 81% in 2024 and 80% in 2023) and 66% say they experience it often. 74% find control important (vs 71% in 2024 and 70% in 2023) and 59% say they experience it often. (YG)

Mind the gap
Security gap: 23% find the need important and never/rarely/sometimes have it fulfilled

at home. Comfort gap: 27% find the need important and never/rarely/sometimes have it fulfilled at home. Control gap: 29% find the need important and never/rarely/sometimes have it fulfilled at home. (YG)

Security gap by income level: lower income 26%, middle income 23%, higher income 19%. Comfort gap by income level: lower income 29%, middle income 27%, higher income 25%. Control gap by income level: lower income 29%, middle income 29%, higher income 28%. (YG)

64% are actively looking for the cheapest product some or all of the time. (GS)

Those living in a flat share have a 43% control gap (vs 29% average) and a 39% comfort gap (vs 27% average). (YG)

Those who have recently started at college or re-enrolled in school have a 39% control gap (vs 29% average). (YG)

Those who have recently divorced, separated or ended an intimate relationship have a 36% comfort gap (vs 27%

average) and a 29% security gap (vs 23% average). (YG)

Ups and downs (all YG)
Security gap: Ended an intimate relationship (29%); Got laid off from work (27%); Moved back into parental home (27%); Took gap year/career break (26%); Started college or re-enrolled in school (25%); Average: 23%.

Comfort gap: Ended an intimate relationship (36%); Started college or re-enrolled in school (33%); Got laid off from work (33%); Moved back into parental home (32%); Took gap year/career break (31%); Average: 27%.

Control gap: Started college or re enrolled in school (39%); Took gap year/career break (36%); Moved back into parental home (36%); Got laid off from work (36%); Ended an intimate relationship (35%); Average: 29%.

Steady ground

Security first (all YG)
Top 5 drivers of security (2023): having a stable and consistent income 40%; having a good quality home (e.g. free from

dampness, access to hot water etc.) 36%; having access to services/amenities (e.g. water, plumbing, electricity) 32%; trusting and feeling safe with the people in my home 30%; having savings in case of unanticipated costs at home 30%. Additional drivers of security (2023): living close to family and friends 24%; knowing my neighbours 19%.

Importance of security in relation to recent life events: purchased first home 87%, moved house 88%, birth of child 87%.

The comfort zone
Top 5 drivers of comfort (2025): having a tidy and organised home 43%; being with the people I love 43% (recently finished school or college 35%, recently had a child 58%); having the right amount of privacy 35%; eating homemade meals 31%; cooking homemade meals 29%. (YG)

Comfort in rooms (all YG)
19% are planning to make changes to their bedroom/ sleeping area, 19% are planning to change their kitchen, and 19% are planning to change

their living room/lounge.

“A home that helps me to unwind or relax” is the top feature of an ideal home – selected by 56% of people.

In the driving seat

Control is important to me: UK 83%, Australia 81%, USA 80%, Canada 80%, Japan 64%, South Korea 55%. (YG)

Behind the controls
Top 10 drivers of control (2025): good mental/physical health 41%; having enough money to take care of my home 38%; not being dependent on others when it comes to finances 35%; having the right space for my needs and belongings 29%; living in a good neighbourhood 28%; being able to decide what changes to make to my home 25%; having a good relationship with my neighbours 23%; having routines in place for everyday chores and tasks 22%; feeling confident in making minor repairs in my home myself 21%; planning ahead 20%. (YG)

Drivers of control in different countries: Good mental/physical

health: France 47%, Spain 49%, Italy 52%, Netherlands 48%, India 42%; Having enough money to take care of my home: Sweden 46%, UK 54%, USA 48%; Being prepared for future events (such as extreme weather, military conflicts or emergencies) by stockpiling supplies and planning for self-sufficiency: USA 16% (vs 9% average); Spiritual or religious practices in the home (e.g. meditation, praying, affirmations, crystals): India 30%; Self-care routines (e.g. skincare, hygiene practices): China 37%. (YG)

Top 5 control drivers – highest vs lowest countries: Good mental/physical health: Italy & Portugal 52% vs Austria & Germany 20% (global average 41%); Having enough money to take care of my home: UK 54% vs Japan 10% (global average 38%); Not being dependent on others when it comes to finances: Slovenia 48% vs India 22% (global average 35%); Having the right space for my needs and belongings: China 45% vs Japan 19% (global average 29%); Living in a good neighbourhood: Sweden 44% vs Japan 12% (global average 28%). (YG)

Having enough money to take care of my home is the top driver of control for house owners. (YG)

Not being dependent on others when it comes to finances is a driver of control for 34% of people living with a spouse or partner and 27% of people living with parents. (YG)

Good mental/physical health is the top driver of control for Gen Z. (YG)

18-24 is the age group that worries most about climate change (67%) and inequality (68%). (GS)

Self-care routines are a driver of control for 25% of Gen Z, 16% of Baby Boomers and 37% of people in China (vs global average 18%). (YG)

Drivers of control for Baby Boomers: living in a good neighbourhood 34%; having a good relationship with my neighbours 35%. (YG)

Planning ahead is a driver of control for 32% of people who have recently experienced the birth of a first child. (YG)

Having enough money to take care of my home is a driver of control for 45% of people who have recently purchased or sold a house/apartment (except the purchase of a first home) and 28% who have recently started university. (YG)

Good mental/physical health is a driver of control for 48% of people who have recently retired. (YG)

64% of people in Japan say control is important to them (vs 74% global average). (YG)

Control through storage
Having the right space for my needs and belongings helps me feel in control: 31% of 18-24s; 29% of 25-49s; 29% of those aged 50+; 29% global average. (YG)

37% are planning to update their storage in the next six months. (YG)

82% of people store food properly to keep it fresh for longer. (GS)

Worry about climate change by age group: 18-24 years 67%; 25-44 years 65%; 45-64 years

63%; 65+ years 65%; global average 64%. (GS)

73% of those aged 18-24 store food properly to keep it fresh for longer (vs 82% global average). 44% of 18-24s use leftovers to make new meals (vs 50% average). 49% of 18-24s don't throw away leftovers from their meals (vs 54% average). (GS)

➔ Chapter 3: Living the change

A place of possibility

Most important in an ideal home – that it helps me: unwind or relax 56%; be my true self 39%; have space for hobbies and activities 38%; save money 31%; be physically or mentally stronger 29%; grow and support my family 27%; nurture connections with people I live with 26%; connect with nature 25%; live sustainably 21%; be more self-sufficient with food and energy 18%. (YG)

What home could be
Same data as previous section.

Actions matter

For 21% of people, an ideal home is one that helps them live sustainably. (YG)

74% of people feel empowered to take climate action. (GS)

44% of people don't know which climate actions will have the most impact – especially older adults. (GS)

The role we play
65% of people want significant action from business to reduce climate change between now and 2030. (GS)

71% of people want better communications from companies on the environmental and social impacts of their products and services. (GS)

Doing more
41% of people say cost is a barrier to climate action. (GS)

Low-income individuals in regard to purchases for the home are 16% points more likely than those with high income to say, “my current financial situation allows me to spend

only on smaller purchases for my home” (lower income 37%, higher income 21%). (YG)

Saving money is the number one motivator to take climate action (54%). (GS)

Top 5 motivators for climate action: helps me save money 54%; knowing the impact of my efforts 42%; good for my/my family's health 41% – highest among older adults and people on high or middle incomes; easy for me to do 39%; more information/advice on what action to take 37%. (GS)

Small but mighty: 5 home truths to make a difference
15% of people say they eat vegetarian or vegan food most or all of the time. (GS)

74% of people are taking everyday climate action by using energy-efficient lighting. 26% use smart tech to manage energy use. (GS)

70% of people try to repair, sell or donate broken or unwanted furniture. (GS)

People partaking in neighbourhood activities in

2025 (vs 2023): donating to local charities 29% (27%); being involved in community groups 23% (22%); volunteering time supporting charities 21% (20%). (GS)

People who enjoy helping out their community have higher optimism about the future (57% vs 48% average). (YG)

82% of people store food properly to keep it fresh for longer. 73% of those aged 18-24 store food properly to keep it fresh for longer (vs 82% global average). 44% of 18-24s use leftovers to make new meals (vs 50% average). 49% of 18-24s don't throw away leftovers from their meals (vs 54% average). (GS)

Lives in transition

Building home (all YG)
Net positive future outlook (the next two years, vs 48% global average): people who have purchased their first home recently 70%; experienced the birth of their first child 69%.

37% of people globally are concerned about their household finances and disposable income,

rising to 47% of those who recently had their first child and 43% of those who purchased their first home.

Of people planning to renovate/improve their home within the next two years, 17% are planning to make energy-efficiency upgrades (e.g. solar panels, insulation, upgraded windows).

Needs at home:
Importance of security in relation to recent life events: moved house 88%; birth of child 87%; purchased first home 87%; global average 82%.

26% control gap for homeowners – vs 29% global average.

For 43% of people, feeling content and at ease comes from being with the people they love – rising to 58% for those who've recently had a child.

Stepping back (all YG)
63% of people globally feel positive about their current life at home, dropping to 54% for those who recently got divorced/separated or ended an intimate relationship and 53%

for those who recently moved back home with their parents.

Of people planning to renovate/improve their home within the next two years, 54% are planning surface renovations of walls and 35% are planning minor redecoration (e.g. new pillows, curtains) – rising to 62% and 44% respectively for those who have recently ended an intimate relationship.

43% of people say that having a tidy and organised home makes them feel content and at ease – rising to 53% for those who have recently ended an intimate relationship.

41% of people who have recently moved back into their parental home are concerned with their mental health, up from 28% global average.

Needs at home:
29% security gap for people who have recently ended an intimate relationship, 27% for people who have recently been laid off – vs 23% global average.

36% control gap for people who have recently moved back in with their parents – vs 29%

global average.

36% comfort gap for people who have recently ended an intimate relationship – vs 27% global average.

Into the unknown (all YG)
Those surveyed living in halls of residence are more positive about the future: 61% vs 48% average.

39% of people who recently took a gap year want a home that allows them to be their true selves (vs 39% average).

46% of people who have recently moved out of their parent's home want space for hobbies and activities (vs 38% average).

Of people planning to renovate/improve their home within the next two years, 63% of those surveyed who recently started university are planning minor redecoration (e.g. new pillows, curtains) vs 46% of people who have recently moved house.

Needs at home:
19% security gap (vs 23% global average) for those surveyed living in halls of residence. Among people who have just

moved abroad, 31% see control as not important (vs 23% average).

82% of those surveyed who recently finished school/college, or who recently graduated from university, see comfort as important – vs 89% of those who recently ended an intimate relationship.

A new chapter (all YG)
26% of people say they are not going to move but are planning to renovate/improve their home within the next two years. This rises to 38% for those whose children have started university and 35% for those whose children recently got married.

People who recently retired vs global average: Hobbies include "helping out in the community" 13% vs 9%; An ideal home is one that helps them "connect with nature" 29% vs 25%; An ideal home is one that helps them "nurture connections with people in my community": 16% vs 12%.

45% of people whose child recently went to university have one or more pets – vs 34% average.

Needs at home:
Security is important for 80% of people who retired vs 88% of those who had their first child.

Good mental/physical health is a driver of control for 41% of people – rising to 48% for those who have recently retired.

Comfort is important to 89% of people whose child recently went to university vs 82% of graduates.

Tack!

Ready to go.

