

2024

IKEA Life at Home Report

Estonia

at Home

Life

Report 2023

Estonia



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01

Introduction





→ 250,000

people from over 40 countries have shared their intimate home life experiences with us over the past decade, revealing the deep emotional connections people have with their homes. This year marks 6th anniversary of distinctive research in Estonia.



Target

The respondents are representative of their country's 18+ population in terms of age, gender, and region.

Sample size

The study conducted 37,428 interviews in 38 countries.

Method

The quantitative Life at Home study was conducted as an online survey (CAWI - Computer-assisted web interviewing) among YouGov panelists.

Acknowledgement

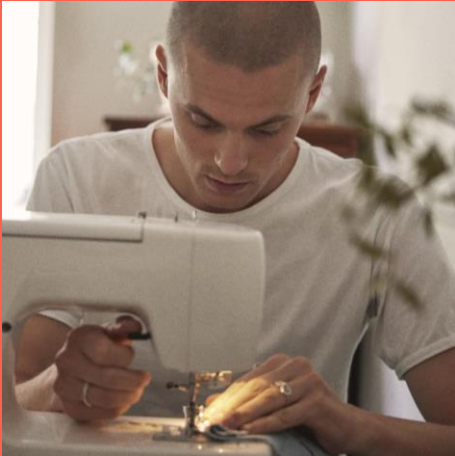
YouGov is the source of survey results.

Baltics Report

This report is based on global report data, featuring insights of Estonia (1007).

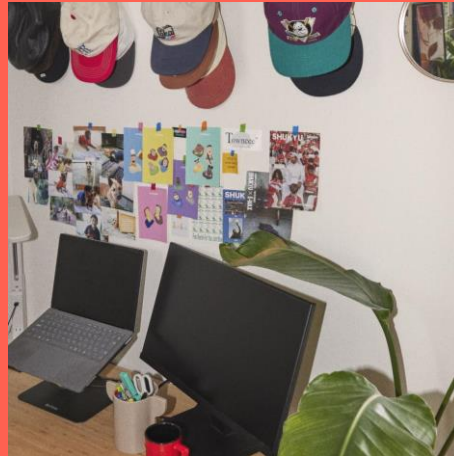
Global transformation

Over the past decade, global and cultural events have transformed home life, subtly changing living habits and redefining the concept of home for many.



→ Cultural changes

Social media and platforms like Airbnb have transformed home life, promoting openness, pressuring ideals, and fostering community through shared experiences and humor.



→ Technology

Technology has disrupted personal relationships and enhanced home efficiency. It shifted from being intrusive to a crucial lifeline during the pandemic, and is now more integrated and balanced in daily life.



→ Wellbeing

Wellbeing has transitioned from primarily outdoor activities to becoming embedded in home life, with the pandemic catalyzing a shift towards in-home wellness spaces and activities, and prioritizing personal health second only to finances in 2023.

A decade of discovery: global trends



→ **Technology.** As early as 2017, people told us it negatively impacted their relationships and killed conversation. 27% were spending less time with a partner as a result of being online. From 2014–2019 technology ranked pretty high as being intrusive in relationships.

People learned to set boundaries. Live with screen time and sought ways to set boundaries. In 2023, only 21% of us feel we use too much screen time. Technology still entertains and plays a larger part in the every day, but it has also made home more efficient.

→ **Wellbeing.** Home has always been a place to rest and recover, but 10 years ago we were more likely to rely on activities outside of home to boost wellness. In the 2018 research, 23% of us left the house to find alone time. The pandemic marked a turning point.

In 2021, 35% of us wanted our own green space within easy reach. Wellness-focused spaces at home are still on the rise. 26% believe hobbies and personal projects contribute to wellbeing. Physical health is the second highest concern for life at home (37%) after household finances (40%) in 2023.

A decade of discovery: global trends



→ **Climate change.** Climate change had been discussed for many decades, but environmental issues were seen as a concern for people with higher incomes. In 2016, only 15% of people felt guilty about owning too many things. In 2020, the year of widespread lockdowns, a focus on nature came to the forefront. 43% of us were open to moving further away from work for a better home. Part of what defined “a better home” was being closer to nature. As an aspiration for sustainable living, 20% of us now feel our ideal home would allow us to be self-sufficient with energy and food.

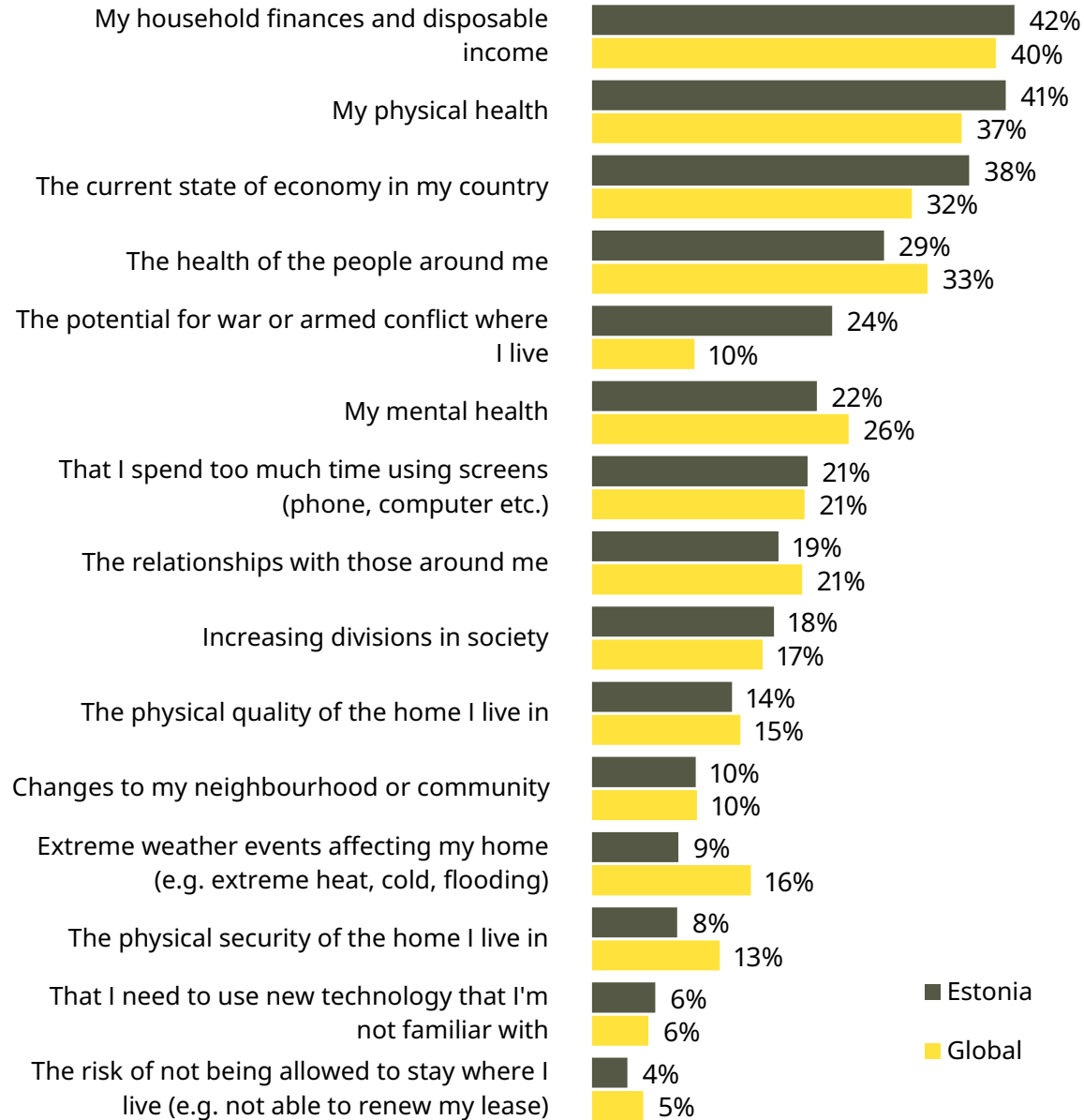
→ **Multifunctional homes.** In the first part of the last decade, people often left home to eat out, exercise, work or find entertainment. The Life at Home Report 2020 showed that 29% began exercising at home, 49% enjoyed cooking more and 32% enjoyed working from home more than going to the office. Changes people made to their homes during COVID-19 restrictions are lasting to some extent. A quest to accommodate more activities in a better way gave rise to multifunctional living.

02

Current Home



Main concerns around life at home



42%

of Estonia's population is primarily concerned about the household finances and disposable income



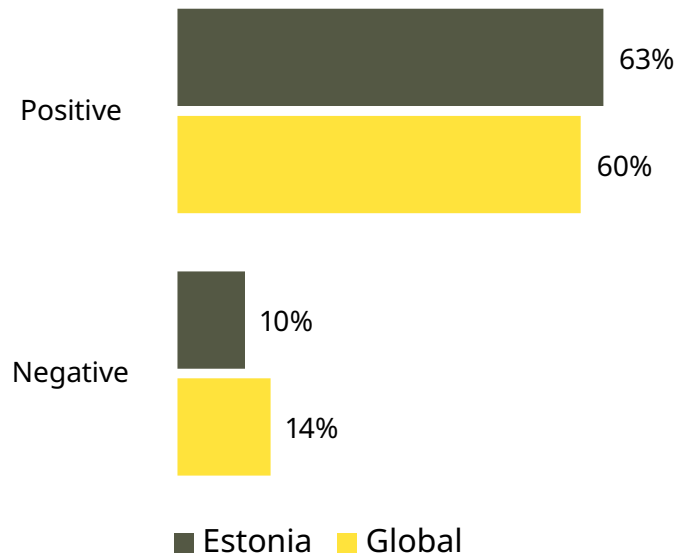
Concern for the potential for war or armed conflict is significantly higher in Estonia (24%) than globally (10%).



Globally, there is a greater concern (16%) about extreme weather events such as extreme heat, cold, or flooding affecting homes, in contrast to Estonia where the concern is lower (9%).



Feeling about current life at home



63%

in Estonia feel positive about their current life at home.

Emotional state at home

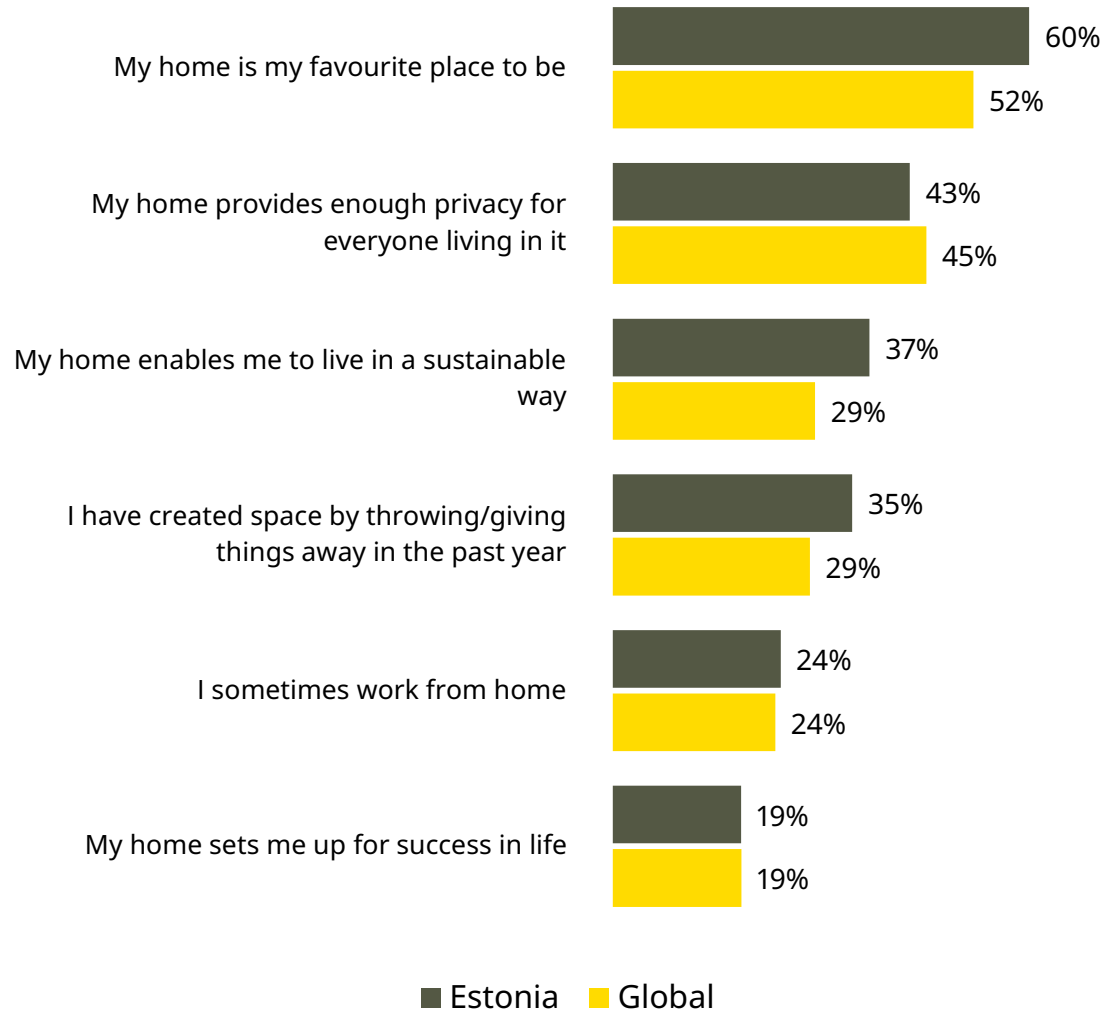


People who would like to move but doubt their ability to do so generally have a more negative perception of their current home life, with only 42% holding positive views.



Concerns about mental or physical health correlate with a less positive view of home life (55%), in contrast, those who do not have concerns about their mental or physical health report a higher rate of positivity about their home life, at 71%.

Home Characteristics



60%

say home is their favourite place to be and this rises to 70% of people who have pets.

Characteristics of Home



A higher proportion of Estonians, at 37%, believe their homes support sustainable living, versus the global average of 29%

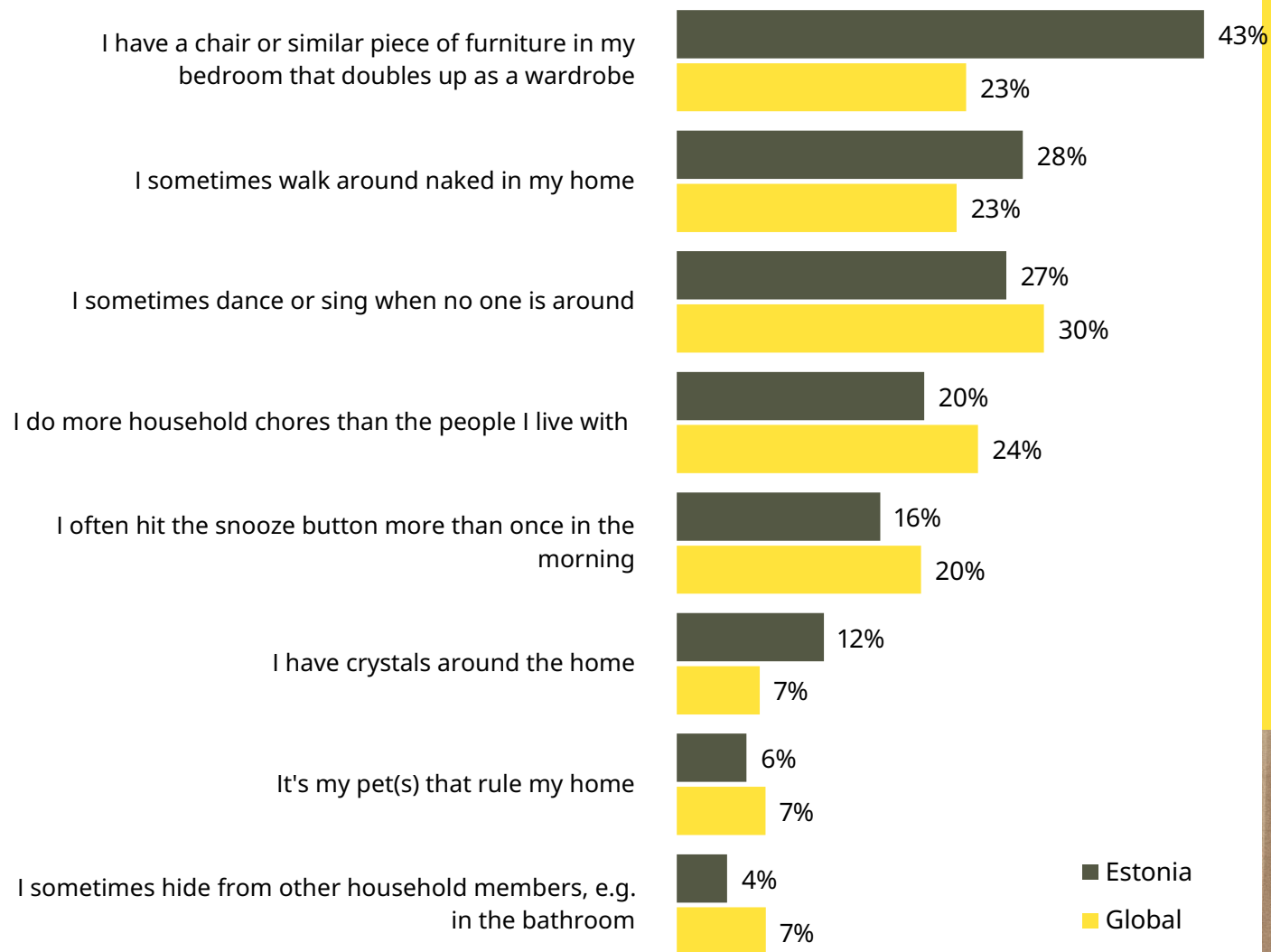


35% of Estonians have made space in their homes by discarding or donating items in the past year, and this figure increases to 51% among Estonians who work from home.



Which of these apply to you / your home?

What do people do at home



Which of these apply to your home?



What do people do at home



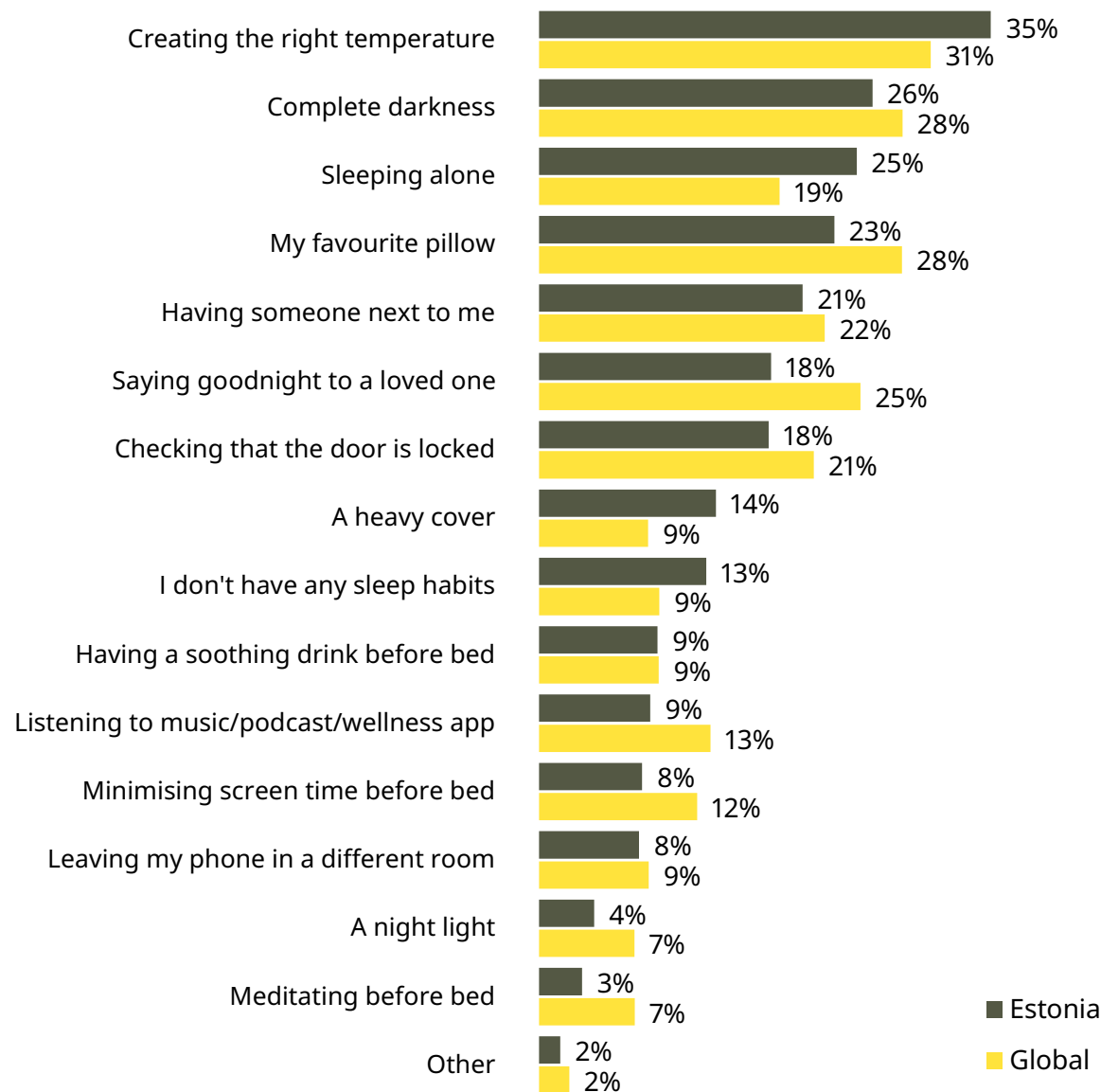
43% of Estonians use a chair or similar furniture as a wardrobe in their bedroom, significantly higher than the global average of 23%.



In Estonia, a higher percentage of introverts tend to walk around their homes naked (37%) and engage in dancing or singing when alone (39%).



Key elements in habits for best sleep



Sleeping

Top 5 conditions for optimal sleep in Estonia

- 1 Right temperature
- 2 Complete darkness
- 3 Sleeping alone
- 4 Favourite pillow
- 5 Someone close

03

Eight Needs of Home



Aspirations

"That your life at home enables you to think and feel positively about your future"

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"

Nurturing

"That you can connect with yourself and take care of your mental and physical wellbeing"

Belonging

"That you are accepted for who you are by the people that you live amongst and in places that reflect you"

Security

"The fundamental elements are in place for you to feel safe and secure in your life at home"

Control

"The feeling that you are in control of your home, what goes into it and how it is used."

Comfort

"That you can create a home that makes you feel content and relaxed"

Future Dreams



Meaningful Moments



Care & Community

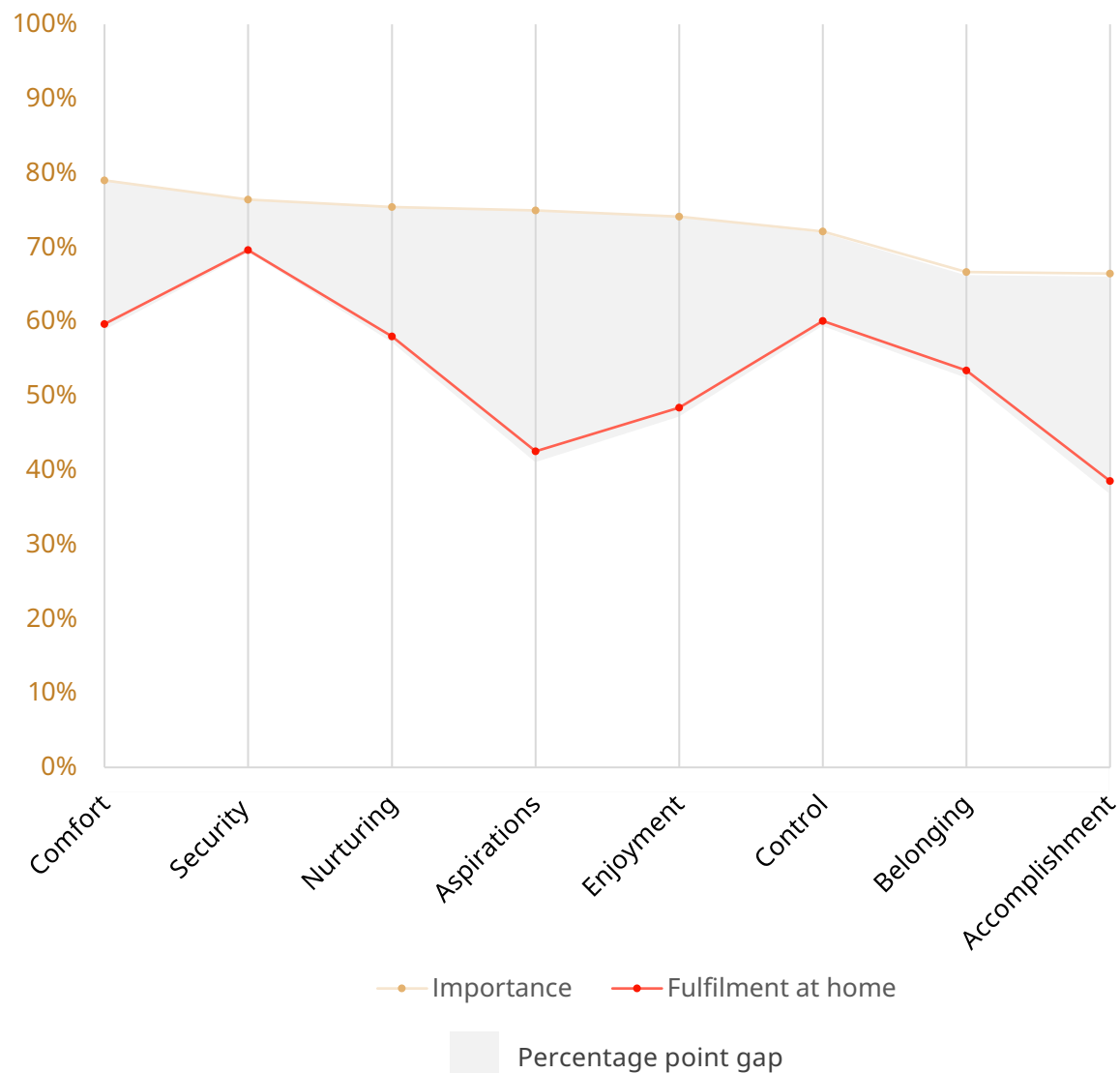


Everyday Essentials





Share of people in Estonia



Gap between importance and fulfilment of needs

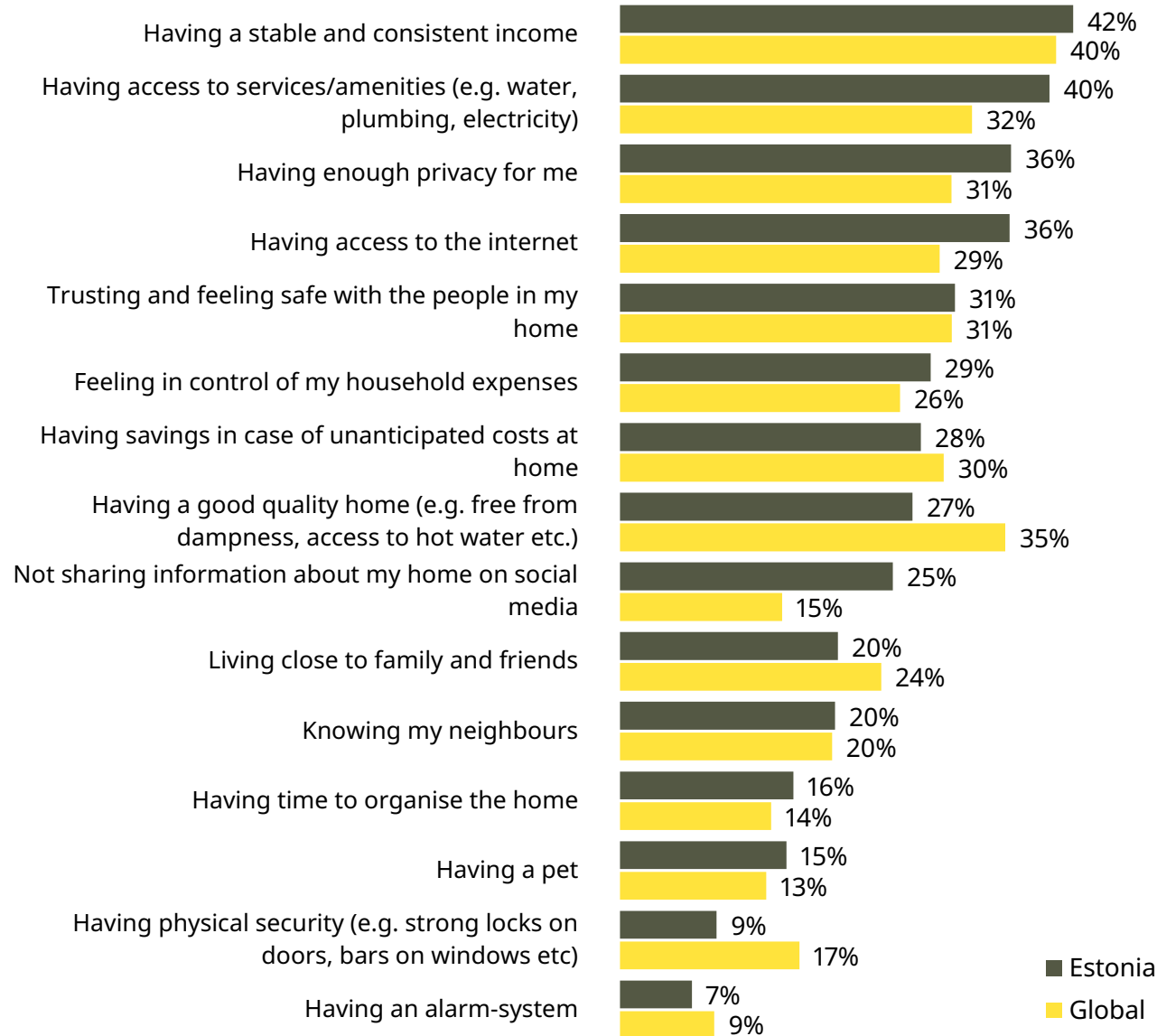


When it comes to importance of eight needs and the actual fulfillment of them at home, the largest gaps are observed in the areas of **aspirations, accomplishments and enjoyment**.



In Estonia, 75% of respondents consider aspirations an important aspect of their home life, yet only 43% frequently experience it.

Main drivers for feeling secure at home



Security



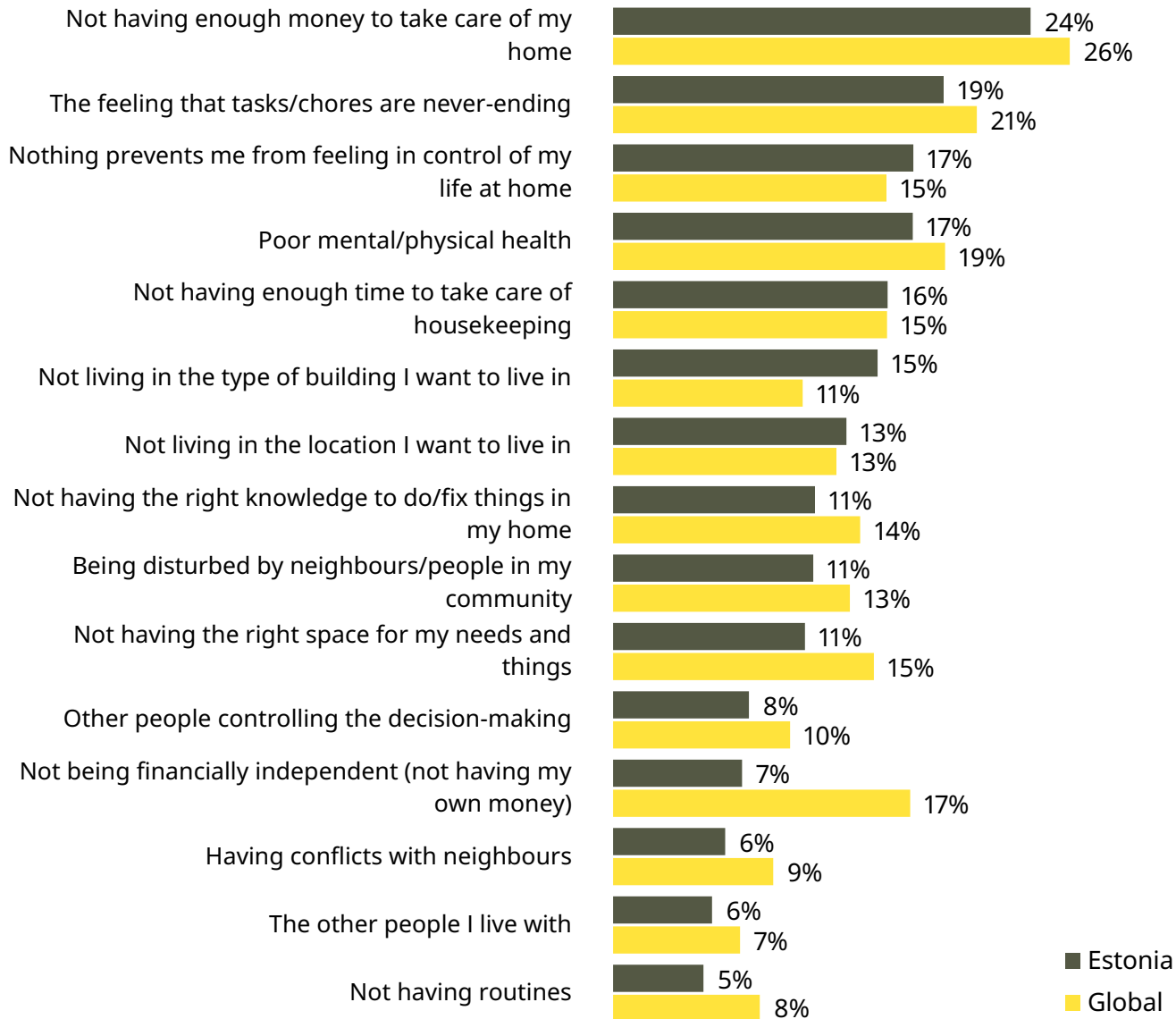
Top 5 factors contributing to home security:

- 1 Stable income
- 2 Essential services (water, electricity)
- 3 Enough privacy
- 4 Internet access
- 5 Trusting and feeling safe with people at home



In Estonia, 50% of full-time workers acknowledge that a stable income is vital for home security. However, this is less common among unemployed (13%) and contract workers (33%).

Main barriers to feeling in control at home



Control



Top 5 barriers to feel in control at home:

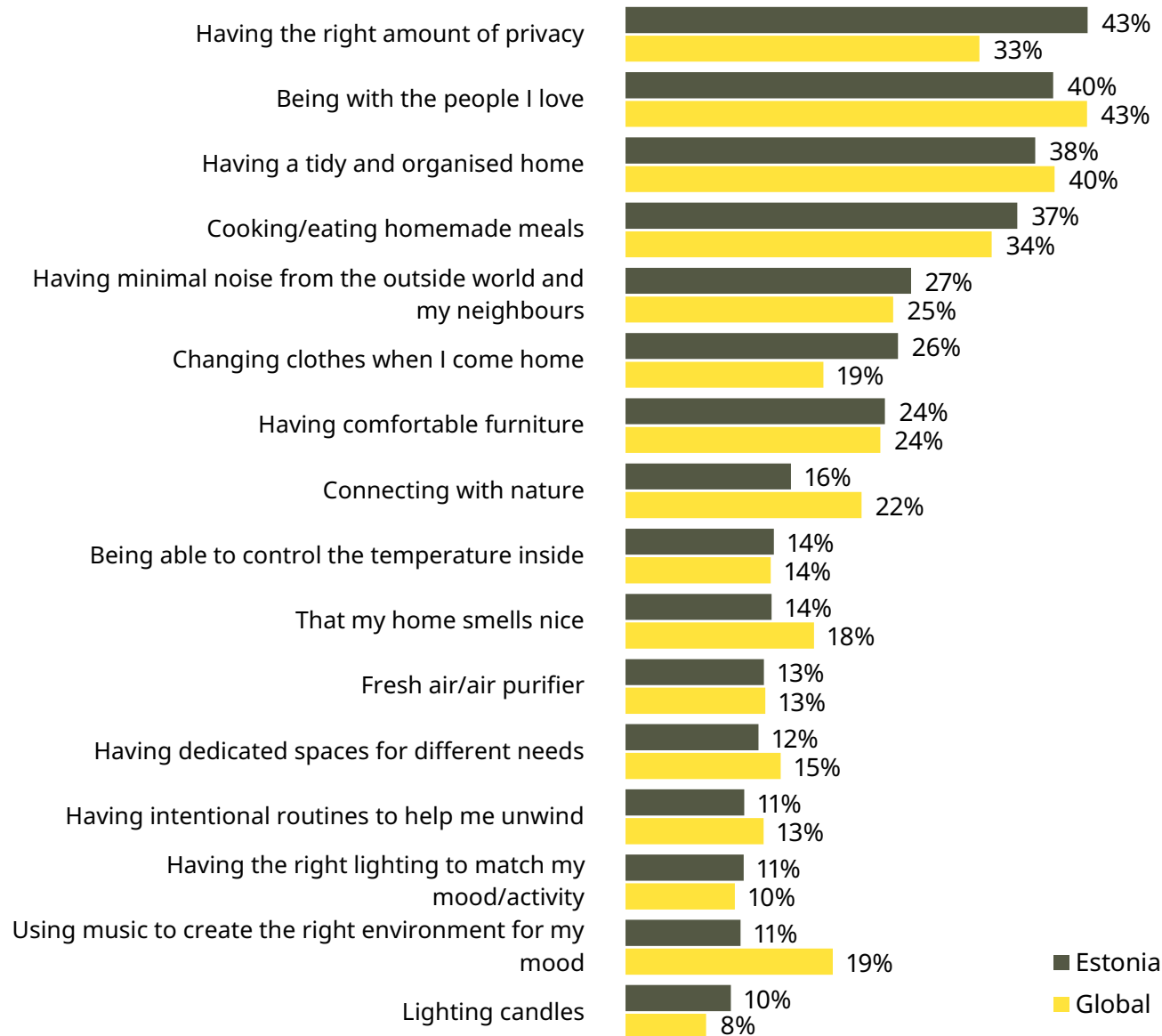
- 1 Financial limitations for home maintenance
- 2 Overwhelming and continuous chores
- 3 Poor mental / physical health
- 4 Not having time do housekeeping
- 5 Poor mental / physical health

17%
people in Estonia say that nothing prevents them from feeling in control of their lives at home.



Which of these prevent you from feeling in control of your life at home?

Main drivers for feeling comfort at home



Comfort



Key factors for comfort at home:

- 1 Right amount of privacy
- 2 Being with loved ones
- 3 Tidy and organized home
- 4 Cooking homemade meals
- 5 Having minimal noise from outside

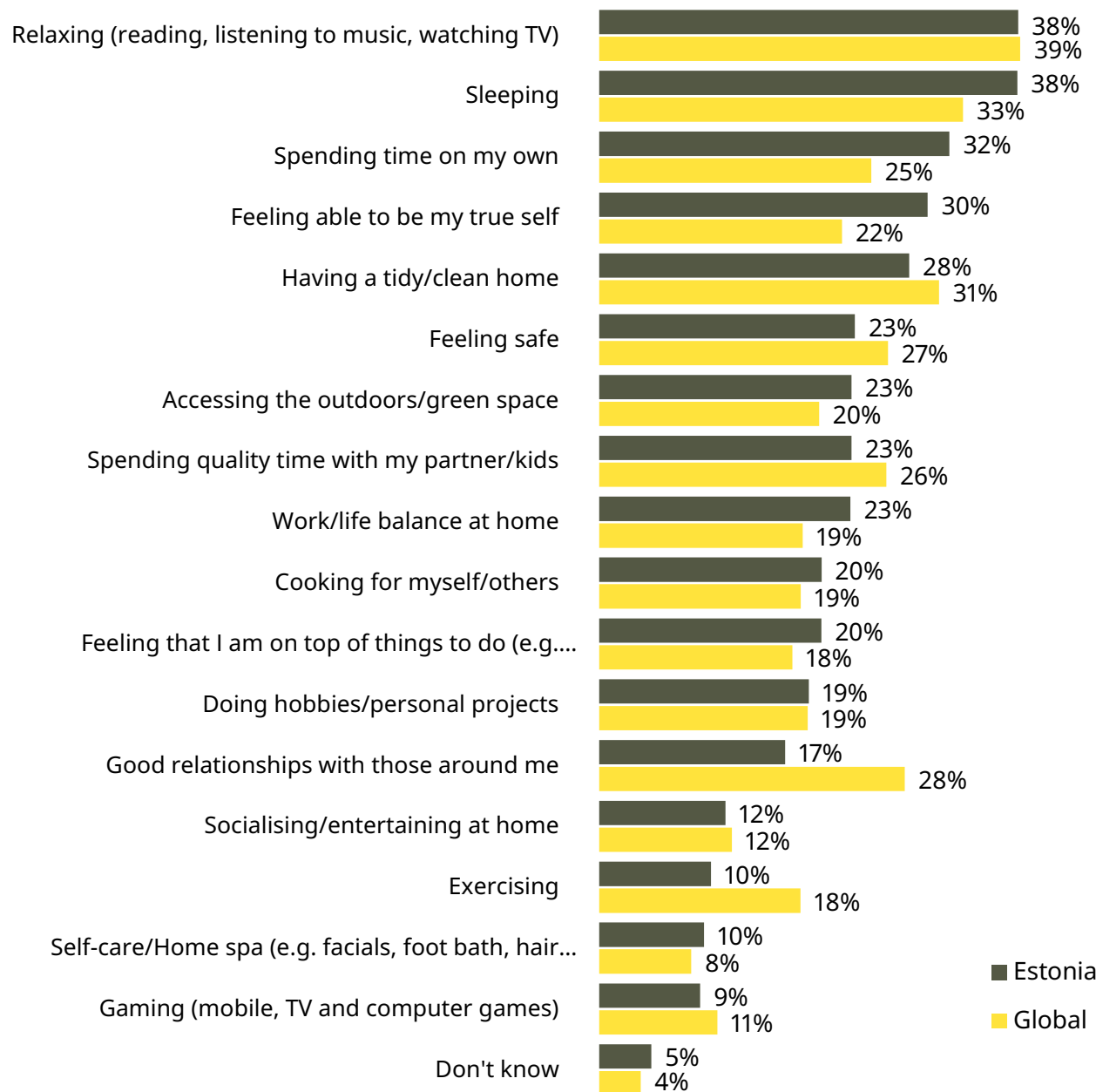
43%

people say having tidy and organised home is one of the most important elements to help them feel content and at ease at home.



Which of the following elements most help you to feel content and at ease at home?

Main drivers for nurturing at home



Nurturing



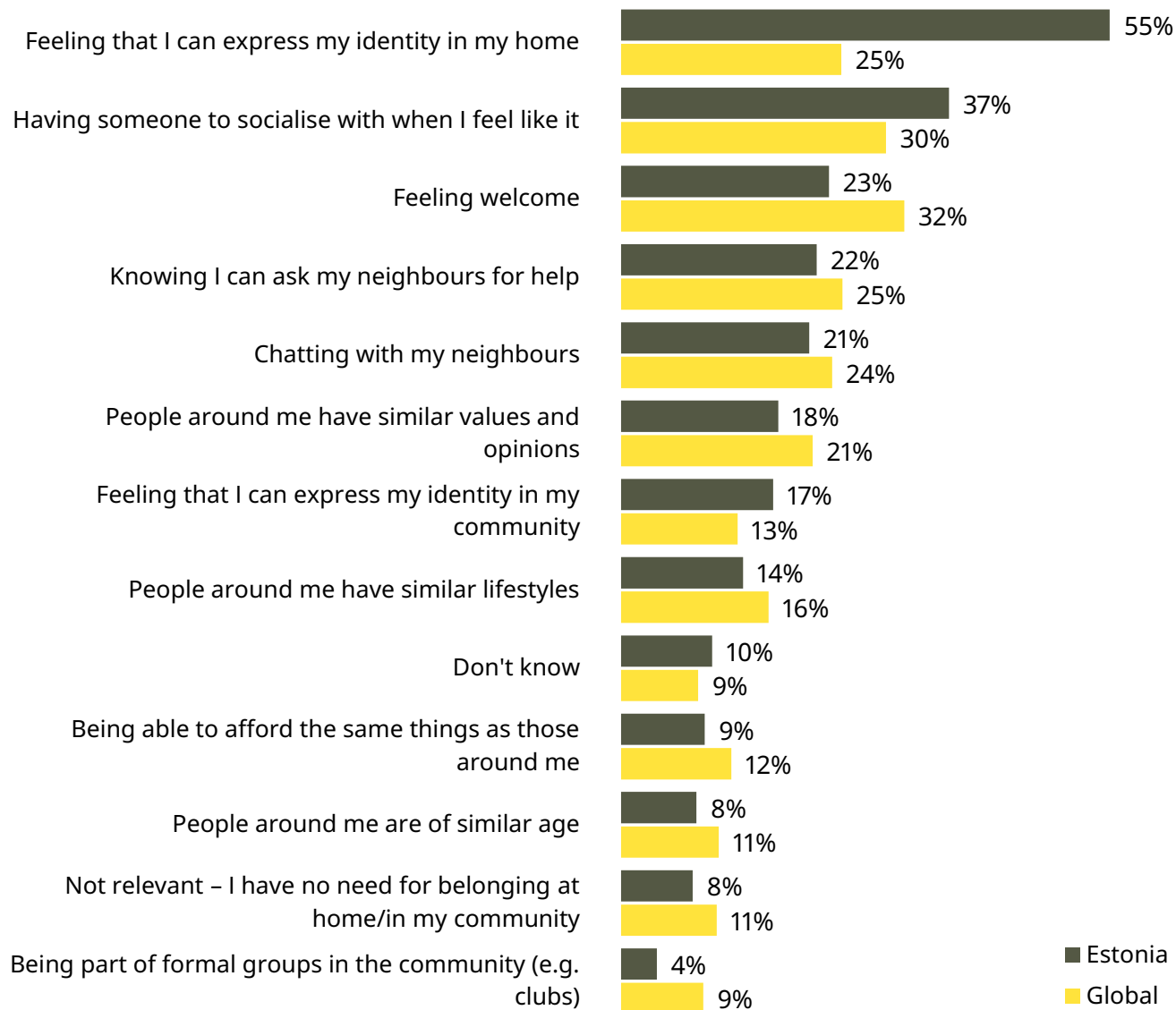
Top 5 drivers for nurturing at home:

- 1 Relaxing
- 2 Sleeping
- 3 Spending time on my own
- 4 Being able to be my true self
- 5 Having a tidy / clean home

In Estonia, those who view their home as a foundation for life success place greater importance on quality time with their partner or children, at a rate of 34%.



Helps to maintain a sense of mental wellbeing at home



Belonging



Top 5 factors for sense of belonging in living space:

- 1 Freedom to express identity at home
- 2 Having someone to socialize with
- 3 Feeling welcome
- 4 Neighbour support
- 5 Chatting with the neighbours

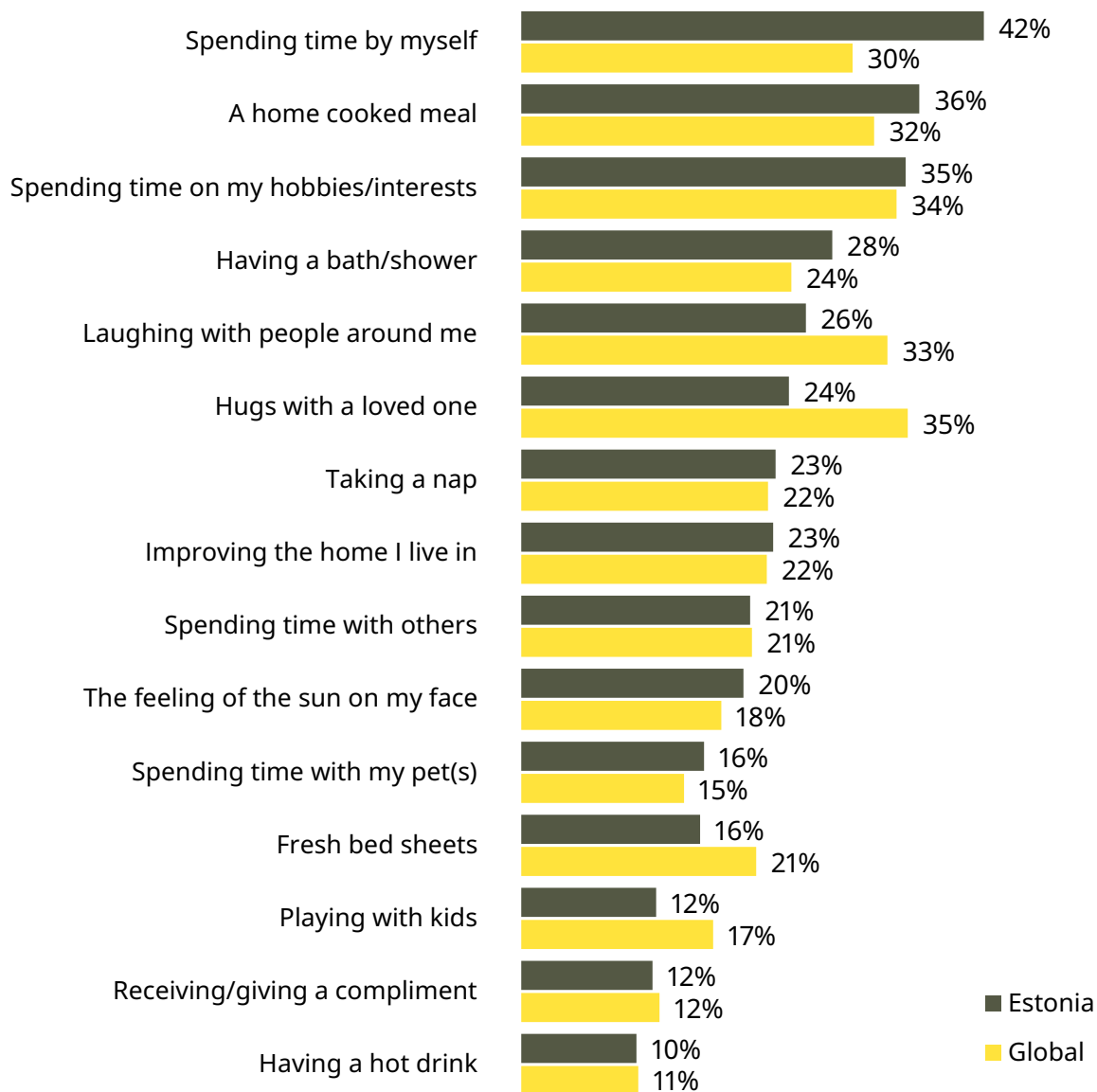


In Estonia, notably more (55%) value expressing their identity at home compared to the 25% global average. This number increases to 65% for those who believe that do more household chores than others.



What helps you feel a sense of belonging where you live?

Main drivers for enjoyment at home



Enjoyment



Top 5 sources of joy at home in Estonia

- 1 Spending time by oneself
- 2 Home cooked meals
- 3 Spending time on hobbies
- 4 Having a bath / shower
- 5 Laughing with people around me

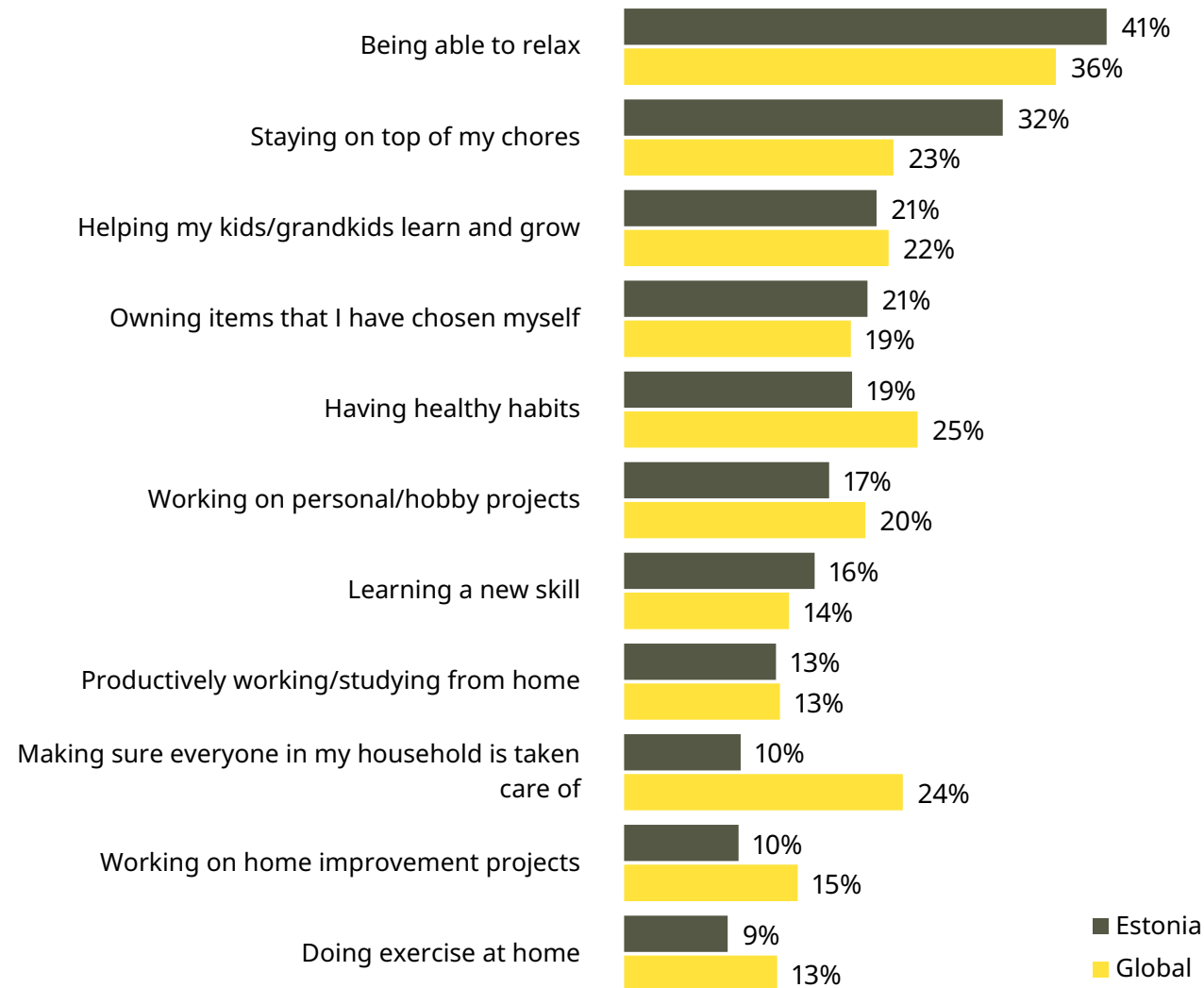
42%

in Estonia
believe that spending
time by oneself
brings the most of joy
in their life at home



Which of these bring you most joy in your life at home?

Main drivers for accomplishment at home



Accomplishment

Top 5 drivers for accomplishment at home Estonia

- 1 Relaxing
- 2 Staying on top of chores
- 3 Helping kids / grandkids learn and grow
- 4 Owning personally selected items
- 5 Having healthy habits



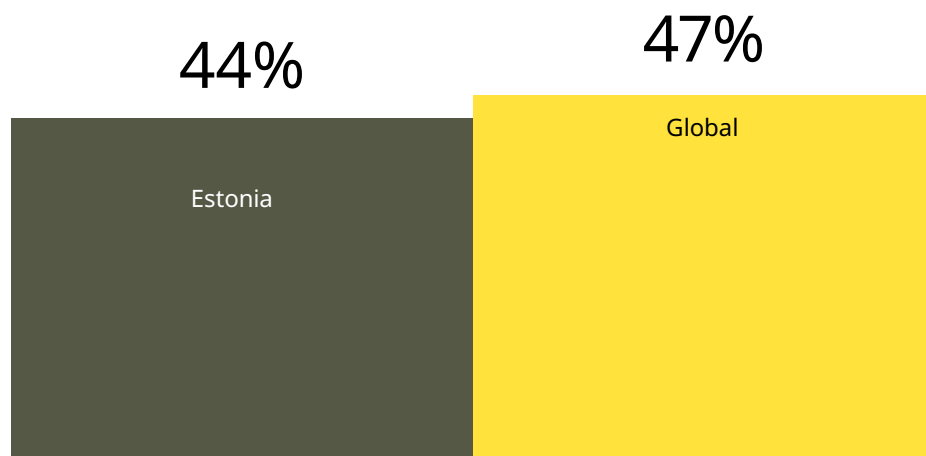
Keeping up with chores: 35% of women see it as a source of pride, compared to 28% of men in Estonia.

05

Future
Home



Positive outlook on the future (next 2 years):

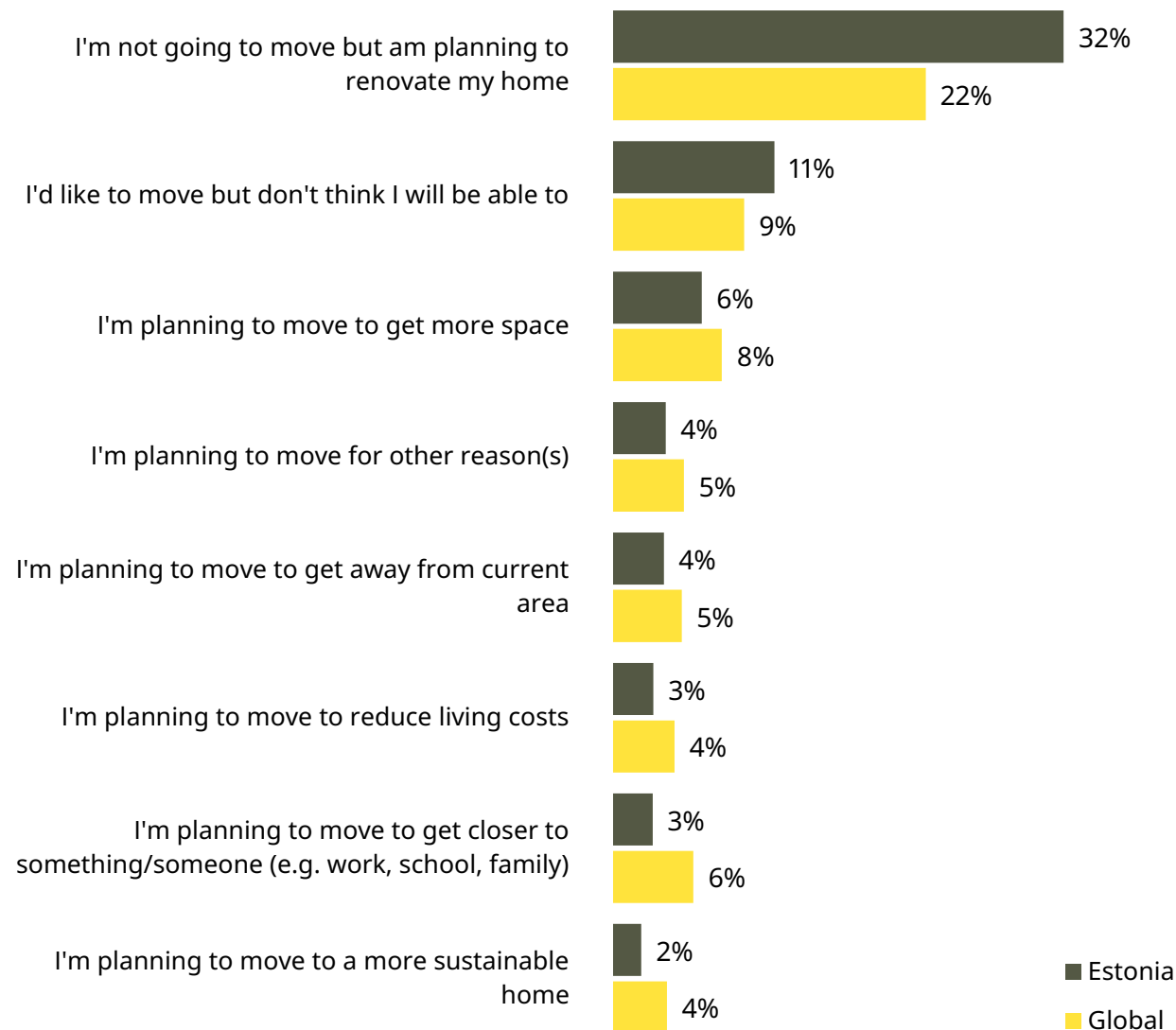


Dream homes equal a dream life – individuals with a positive view of their home life also tend to have an optimistic outlook on their future where 50% of respondents express a positive view.



In general, how would you describe your outlook on your future (the next 2 years)?

Motivations for moving or renovating homes



Moving

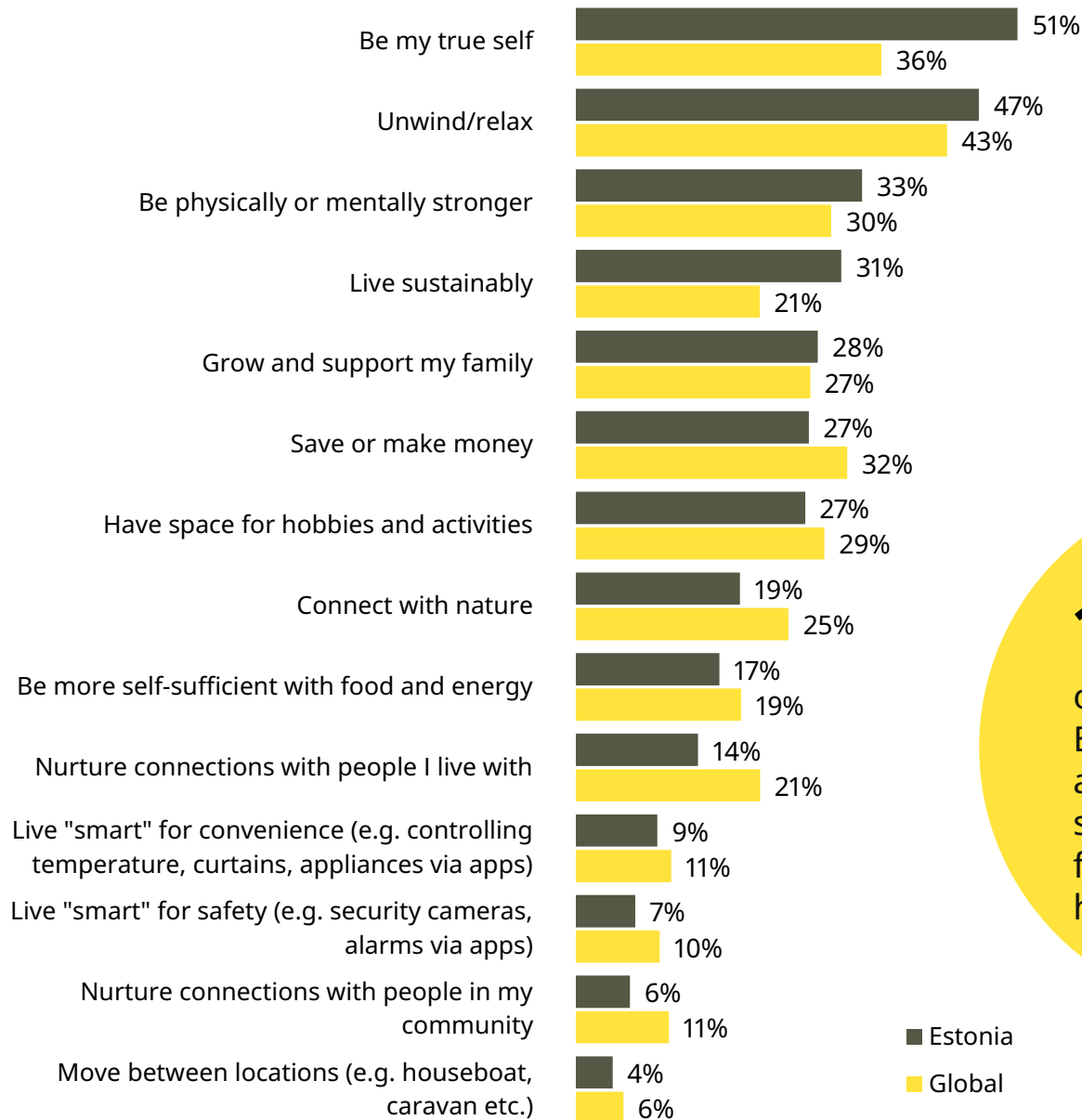
55%

of people are either looking to move or renovate their home in the next 2 years



Are you planning to move to a new home or renovate your current home within the next 2 years?

Most important in an ideal home



1 in 2
of the population in
Estonia considers the
ability to be their true
self as the most crucial
feature of an ideal
home

Ideal home



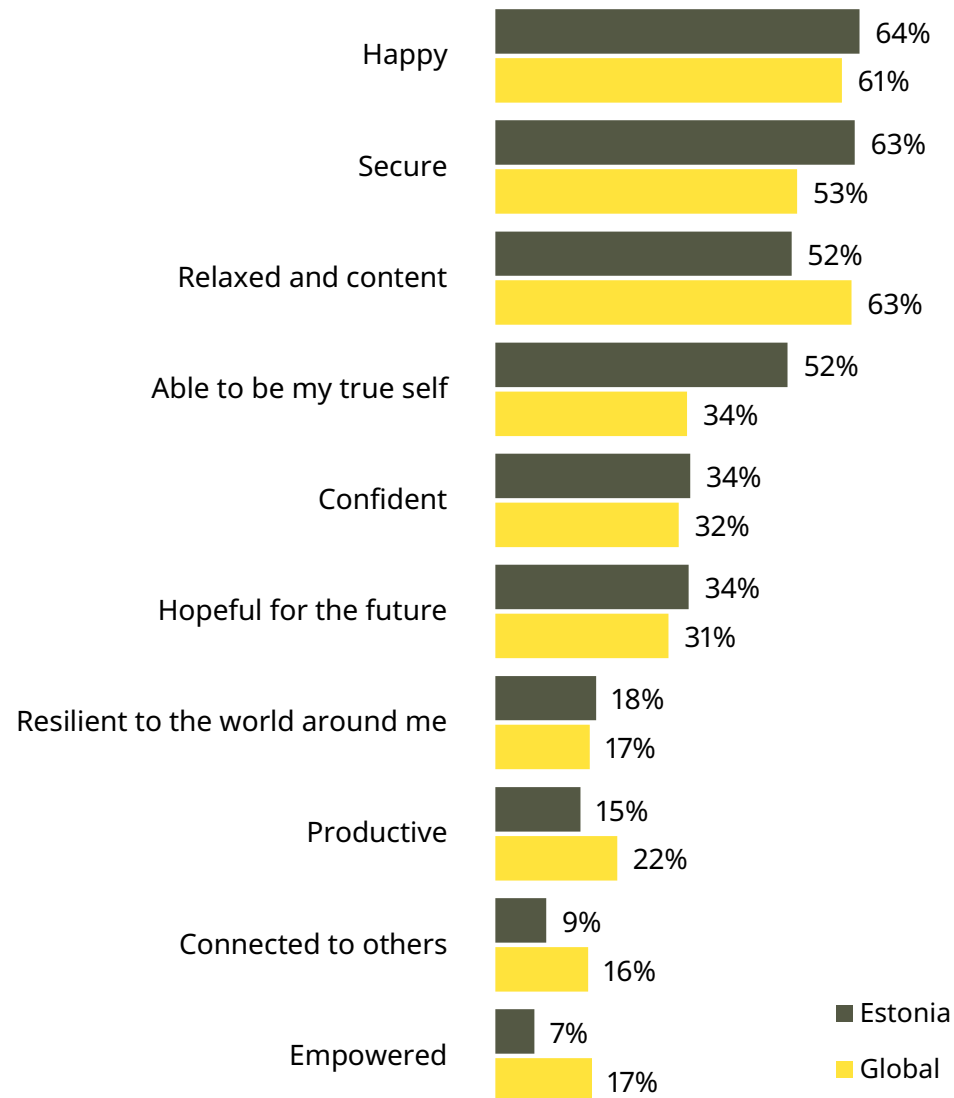
Top 5 aspects for ideal home in Estonia

- 1 Be my true self
- 2 Being able to unwind / relax
- 3 Be physically or mentally stronger
- 4 Live sustainably
- 5 Grow and support my family



Which of the following aspects would be the most important to you in an ideal home? A home that helps me...

Main outcomes of life in an ideal home



Happiness is a Universal Desire



In Estonia, 52% of people feel that their home environment should make them feel relaxed and content, which is lower than the global average of 63%.

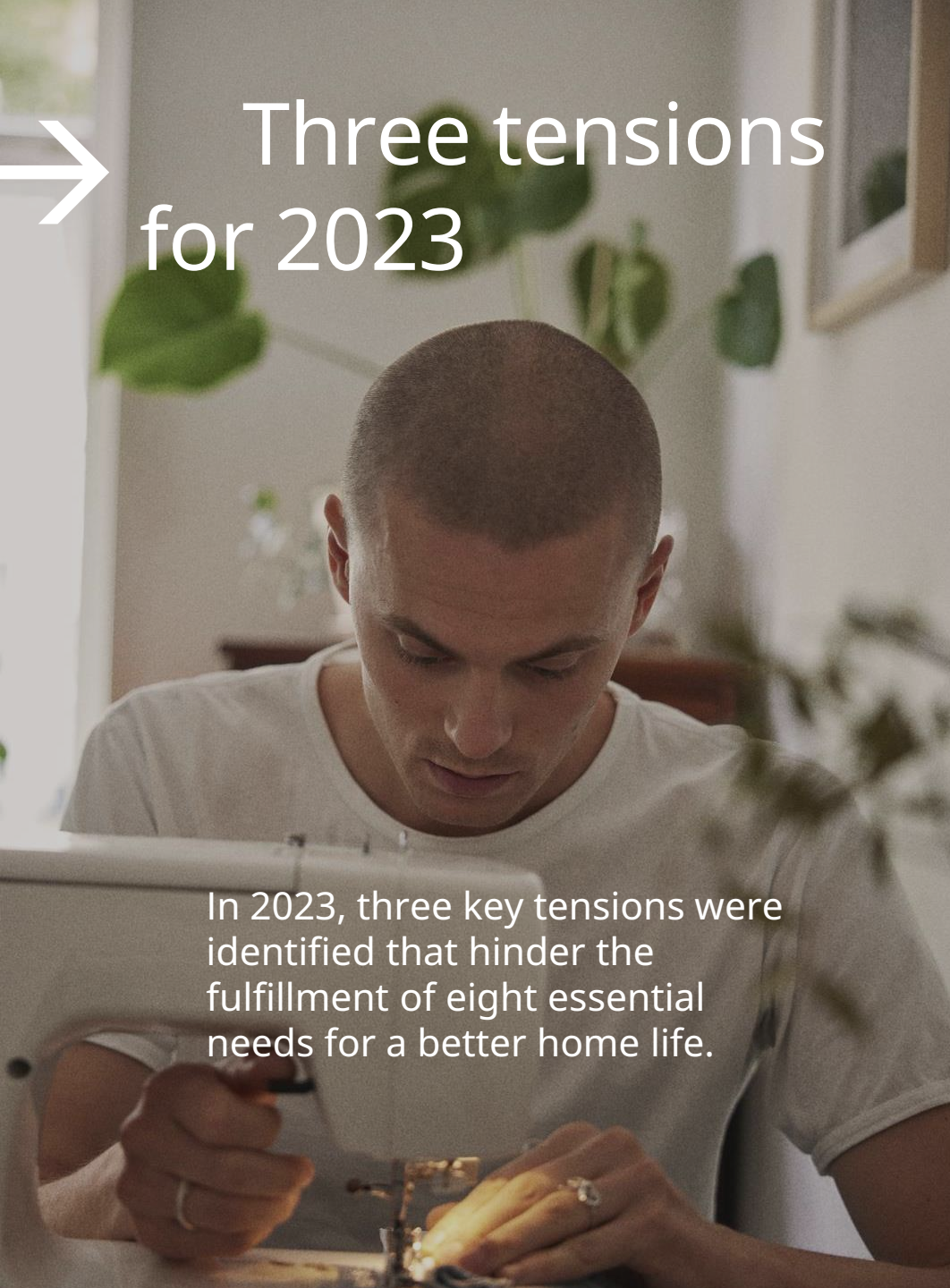


Imagine your life in a home that is ideal for you. How would that home make you feel?

04

Three Tensions for 2023





→ Three tensions for 2023

In 2023, three key tensions were identified that hinder the fulfillment of eight essential needs for a better home life.

Doing more



Keeping busy or taking it easy?
Wanting to be productive working, studying or tackling projects competes with the need for simplicity and tranquillity at home.



Doing less

Togetherness



An open door or do not disturb? Balancing an innate need for human connection can be in direct conflict with the desire for personal space to recharge, reflect, and be at ease with yourself.



Privacy

Living well



Zero waste or zero spend?
Living a life that prioritises healthy and sustainable living can be a challenge because of the worry that it could break the bank.



Living within our means

06

Conclusions



55%

of people are either looking to move or renovate their home in the next 2 years (23% planning to move, 32% planning to stay and renovate) as home situations are changing all the time.

We find the most joy at home in the small, everyday connection moments:

24%

hugs with a loved one

26%

laughing with others

80%

of people who think their home helps them live sustainably, feel positive about their current life at home.

Sleep is a key part of relaxing, resting and ultimately doing less. Key elements in everyday sleep habits that help you get the best possible sleep are:

35%

creating the right temperature

26%

complete darkness

23%

60%

say home is their favourite place to be and this rises to 60% of people who have pets.

38%

say that having a tidy and organised home helps them to feel most content and at ease at home.

33%

said their ideal home must help them be physically or mentally stronger.

43%

people say having the right amount of privacy is one of the most important elements to help them feel content and at ease at home.

28%

sometimes walk around naked in their home.

24%

of people feel a loss of control when we do not have enough money to take care of our home.

Thank
you!