



Happy neighbourhood report 2026

Creating safe, flexible and inclusive homes for the future



BONAVA

A study of changing housing needs

Where do people choose to live, and what makes them feel comfortable and want to stay? Over the past 10 years, Bonava has developed around 50,000 homes, and our heritage stretches back nearly 100 years. Throughout this time, we have been driven by a human perspective and a desire to understand what truly matters.

As a leading housing developer, we always start with the individual and the interpersonal when planning our neighbourhoods. Some aspects remain constant over time, while others change, just like the world around us. Over several years, we have conducted studies across six markets to gain a deeper understanding of people's needs and what drives them – and how these evolve over different stages of life.

The results of this year's study are presented in this report. We hope it will spark ideas and provide inspiration. For us, it is a valuable source of insight in our ambition to create safe, welcoming and intergenerational neighbourhoods for the future.

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About the study

The study was conducted together with the insight agency VAKN in January 2026. The study included a total of 4,000 respondents (Men and women 20–74) in Sweden, Finland, Germany, Estonia, Latvia and Lithuania.

Bonava interviews: Grit Jopp, Landscape Architect in Germany, Panu Sivula, Regional Manager in Finland, Alina Urbutytė, Head of Design in the Baltics, Helene Dahlborg and Kristina Hallberg, Project Marketing Managers in Sweden.

The neighbourhood as a safe haven

The most important factor people value when choosing their home and neighbourhood is safety. Year after year, the same pattern emerges: feeling safe, both in the home and in the surrounding area, is crucial to people's sense of comfort and their willingness to stay.

Summary

- Safety is for many the most important factor when choosing where to live, and it is also essential for whether people spend time outdoors in their neighbourhood.
- Perceptions of safety vary across age groups, with younger residents reporting higher levels of insecurity in their local areas.
- Neighbourhoods feel safer when they are well-lit and designed for everyday presence, and when greenery, climate adaptations and shared spaces work to bring generations together.

Safety is one of the most fundamental human needs, but because it is both tangible and emotional at the same time, it is relatively difficult to define. On one level, it can be tracked and improved through measures such as lighting and a well-functioning physical environment in the neighbourhood, but on another, it concerns something more subtle: a sense of belonging, an understanding of what is happening around us, and a feeling of control and trust. It is only when that sense is present that we can fully make use of our homes and neighbourhood, engage with others, and live our lives without constraint.

Our results show that a sense of safety, together with reasonable housing costs, is one of the most important factors across all generations when people choose where to live. More specifically, 49% prioritise a safe and pleasant area. Safety is also something people need in order to want to spend time in the area itself. The figures show that safety ranks highest when it comes to a person's willingness to spend time outdoors. Safety is considered essential by 75% of respondents.

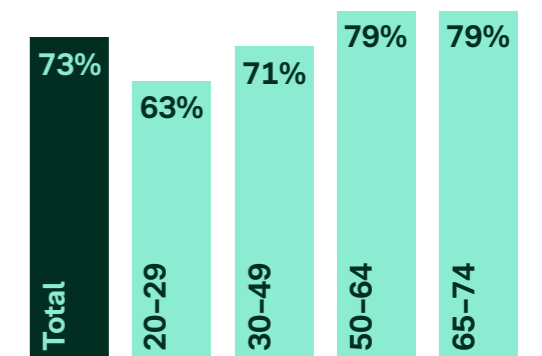
At the same time, we can see clear differences between generations. Those aged 50-74 are more likely to perceive their neighbourhood as safe compared with younger generations. Among those aged 65-74 and 50-64, 79% report feeling safe in their neighbourhood, compared to 63% among 20-29-year-olds. This may be explained in part by older people having more established social networks, as well as a greater ability to choose where they live. The younger generation aged 20-29 experiences higher levels of insecurity, both at home and in their local area. The differences may be explained by factors such as different movement patterns and media habits, spending time outdoors at different times of the day, or not having the same level of local attachment. The gap between perceptions across the generations raises questions about the future of urban development: how can we design neighbourhoods that are perceived as safe, regardless of age or life situation?

49%

prioritise a safe and pleasant area, making this one of the most important factors.

75%

believe that safety is essential for spending time outdoors in their residential area.



Age differences in how safe people feel in their residential area.



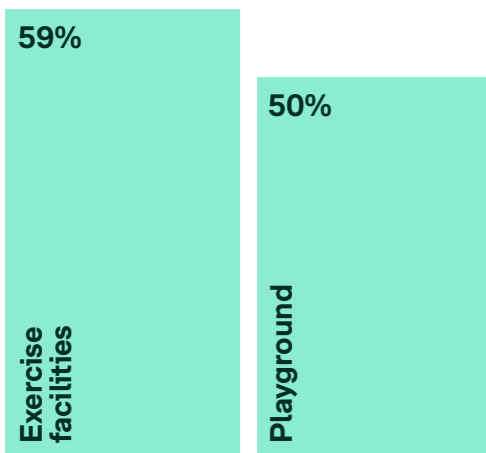
Grit Jopp at Bonava has been working with the design of landscapes and neighbourhoods since 2010.

Bonava's landscape architect, **Grit Jopp**, has spent over 16 years planning residential environments, with a particular focus on safety. She emphasises the importance of a human-centred approach that can highlight aspects such as comfort and community, rather than focusing solely on planning legislation.

"We need to understand how people perceive and use their neighbourhoods, and the challenge ahead will be balancing regulatory requirements with creative, cost-effective solutions," says **Grit Jopp**, who explains that an important part of creating safer environments is planning for the presence of other people. Seeing life and activity in an area, with people meeting and visibly using shared spaces, is in itself a strong factor in creating a sense of safety. Because places that feel lively are perceived as being safer, the design of shared spaces in a neighbourhood becomes crucial. When different functions are brought together and integrated (such as playgrounds, seating areas, allotments and leisure spaces), natural meeting points are created. This gives rise to a kind of local centre between the buildings where people from different generations can come together.

"Planning for connection and proximity becomes a fundamental part of creating safe environments. The opposite occurs when shared spaces are spread out and separated."

Safety is also influenced by how well we recognise and understand our surroundings. In new or unclear environments, feelings of insecurity can increase, particularly among children and older people. The ability to orient oneself, and how the area is structured, become important. We therefore often work to introduce clear visual elements that create a sense of recognition and structure, such as varied colour schemes, sculptures, planting and signage.



Share of people who consider exercise facilities and playgrounds essential or nice to have for wanting to spend time outside in their neighbourhood.





43%

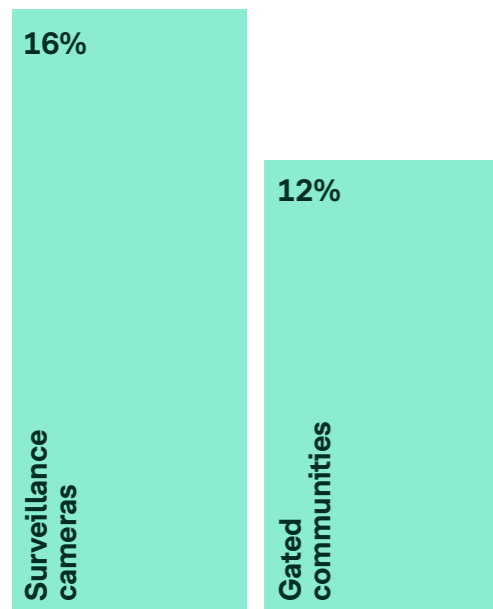
think that outdoor lighting is essential for spending time outdoors in their residential area.

Another important dimension is time. A neighbourhood needs to function not only throughout the day, but also across the seasons. During the summer months, greenery, light and activity contribute to a naturally vibrant and inviting environment. In winter, conditions change. Darkness, the presence of fewer people outdoors and the absence of vegetation can make environments feel less safe. To counter a harsher experience of the area during winter, a conscious approach to lighting and colour is required. Evergreen planting can be an effective option in this regard.

“Greenery and colour play a particularly important role. Evergreen trees and shrubs, and plants that retain their colour year-round, create a sheltered and welcoming impression,”

says **Grit Jopp**, adding that green environments also encourage time spent outdoors and activity, factors that strengthen perceptions of safety. “Particularly in the case of younger generations, who are more exposed to negative news stories and digital environments, physical presence in a lively and well-maintained environment can help to reconnect them with a more tangible and secure everyday life.”

The complex concept of safety, as previously mentioned, does not come down solely to the immediate physical environment or the risk of crime. More long-term and diffuse threats can also influence how safe we feel where we live. Climate-related factors, such as extreme weather, high temperatures and flooding, are examples of other issues that can also cause concern. The inclusion of shaded areas, water management and climate-adapted solutions therefore also becomes part of the work to create safer environments. When these solutions are visible and it is clear that the environment has been



Share of people who consider surveillance cameras and gated communities essential for spending time outdoors.



40%

say that green areas in their residential area are essential for spending time outdoors.

carefully considered and well maintained, they can contribute to a sense of control and trust.

There are several reasons why we at Bonava place such strong emphasis on safety. One of them is that insecurity in the residential environment has consequences that extend far beyond the individual. On a personal level, it can lead to isolation, reduced freedom of movement and, in the worst case, a deterioration of mental health. At the societal level, it also risks eroding both trust and social cohesion. Those who feel unsafe tend to avoid public spaces, withdraw from social contexts and become more likely to mistrust their surroundings. This can create a negative spiral, as it results in fewer spontaneous encounters and everyday interactions between neighbours – the very elements that build safe and resilient communities.

Safety is largely created through interpersonal interactions. **Grit Jopp** emphasises that this also applies to the planning process. She encourages early dialogue with residents and local stakeholders, such as social workers, youth organisations and community groups, in order to identify safety-related issues and define planning objectives.

“By involving residents and other stakeholders at an early stage, the sense of participation and identification with the place is strengthened.”

And while the solution does not lie solely in physical design, as housing developers, we can create better conditions through tangible measures. Through measures such as lighting, greenery, improved legibility, climate adaptation and central spaces for social interaction, we can help to create areas where people of all ages feel safe and comfortable.

Housing beyond the family norm

Birth rates have been declining for some time, and fewer young people plan to form traditional families in the future. This raises the question of what will be required from our houses going forward. Should we put more emphasis on developing space-efficient, flexible homes, with layouts that make it possible to adapt our living spaces and that allow rooms to change function in line with our stage in life?

Summary

- Declining birth rates are challenging the traditional family norm and creating a greater need for homes that reflect a wider range of lifestyles and household types.
 - Flexible layouts and space-efficient design can help homes adapt over time, allowing rooms and functions to change as people's needs evolve.
 - For housing developers, the challenge is not only to design adaptable homes, but also neighbourhoods that can remain relevant as social structures and needs change.
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The traditional family has long been the starting point for housing development, but as demographics shift, this notion is increasingly being challenged. Across our markets, the average number of children has now fallen to 1.26 per woman. These figures appear to reflect a lasting change – in our study, one in three young adults say they neither have nor plan to have children. In Finland, the share is even higher, at 47%, compared with 24% in the Baltics.

What do these demographic changes mean for how we plan housing and neighbourhoods? As fewer households are formed around the traditional family, it becomes clear that homes need to meet a wider range of needs and reflect different life situations. A home should work just as well for someone living alone as it does for a couple without children, a family in transition, or someone whose life is undergoing change.

Flexible layouts are one way we can respond to these shifting needs. In practice, this means designing homes that can evolve alongside the people who live in them. It should be possible to change the function of rooms over time, for example from a dining room to a workspace or a child's room, without this resulting in a loss of quality or usability for the home as a whole.

Our study shows that technical solutions which allow walls to be moved or removed are now in greater demand. 21% of respondents express an interest in flexible walls, and demand is highest among those aged 20–49. In the 30–49 age group, the figure reaches 27%, followed by 26% among those aged 20–29.



32%

of young adults aged 20–29 state that they neither have nor plan to have children.

44%

of young adults aged 20–29 do not have children but plan to have in the future.

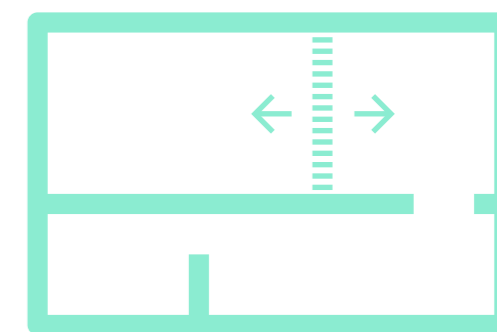


Smaller homes also have a need for adaptability. To meet the needs of new financial realities and changing lifestyles, more functions need to be accommodated within fewer square metres. A home of around 56 sqm can work as either a one or two-room apartment by combining functions such as the kitchen and living area.

In Finland, several Bonava projects have placed focus on versatility and flexibility. **Panu Sivula**, Regional Manager in Finland, explains that the different lifestyles of residents have shaped how neighbourhoods are designed. Private homes are combined with well-considered shared spaces, such as a sauna area at the top of the building with a connected balcony, as well as a shared workspace on the ground floor that enables remote working close to home.

Panu Sivula adds that if layouts are to be flexible – for example, via the inclusion of movable walls – this needs to be considered from the planning stage. The placement of windows plays a crucial role in determining how adaptable a home can be. At the same time, challenges exist, particularly in smaller homes.

“Smaller homes also have the need for adaptability.”

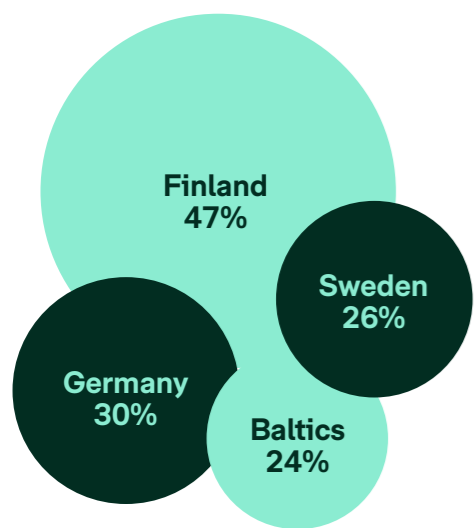
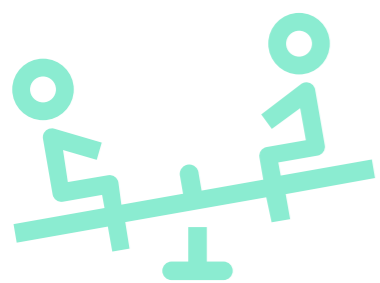


21%

are interested in flexible walls.

17%

are interested in a separate rental unit.



Share of 20–29 year-olds in each region that do not have children today and do not plan to have children.

But these demographic shifts also raise a broader question – one that extends beyond individual homes and neighbourhoods. What does it mean for housing planning and society at large when a growing share of young people does not plan on starting a family? Space-efficient solutions, flexible layouts and well-designed shared spaces are all important parts of the answer, but so too is the ability to plan environments that can adapt as conditions change. This affects how we plan shared environments, services, meeting places and social structures.

The situation calls for a more flexible approach to urban planning, where areas can evolve and be reshaped over time as needs shift. We need to look beyond today's target groups and create structures that will work across generations. How can we design neighbourhoods that will remain relevant both now and in the future? This is a question to which the answers are not yet clear, but one that is becoming increasingly important to explore in collaboration with other stakeholders involved in the shaping and development of society.

With this in mind, it becomes clear that housing development needs to allow for change over time. The task at hand is to create homes and neighbourhoods that can meet the needs of today while also being able to evolve in line with new ways of living.



The home as a workplace

For many, the home has also become a place of work, and this shapes how we design both housing and neighbourhoods. As more people work remotely, the need for space-efficient, flexible solutions grows. Solutions that make it possible to work smoothly and with a reasonable level of privacy, both within the home and in shared environments nearby. How can we create living spaces that accommodate both work and private life? And how can we make that work within smaller living spaces?

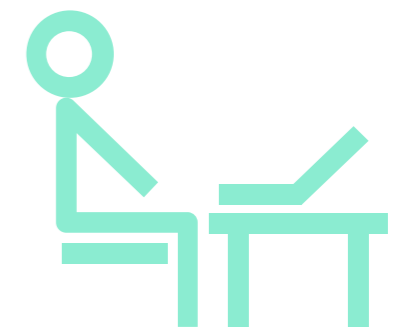
Summary

- With 41% of the working population working from home at least once a week, the home is increasingly becoming a place for both private life and work.
- Smaller living spaces require smarter designs, from flexible furniture to dedicated work areas with good ergonomics, lighting and privacy.
- Interest in shared neighbourhood workspaces is growing, but their success is dependent on careful planning, clear conceptualisation and dedicated management.

Our study shows that 41% of the working population work remotely at least one day a week. Almost 30% would also like a dedicated workspace at home. Interest is similar among those aged 30–49 (31%) and 20–29 (30%). Remote and hybrid forms of working place new expectations on what a home needs to accommodate. When one person, and in some households several people, works remotely, this places greater demands on flexibility and smart solutions that can create functional work areas, even within smaller living spaces.

One challenge is that the growing demand for workspaces coincides with rising prices per square metre across several markets. Simply adding more space is therefore rarely a realistic solution. **Alina Urbutytė**, Bonava's Head of Design in the Baltics, emphasises that housing needs to be designed more intelligently so that the same space can accommodate multiple functions. Living spaces should support both working life and private life without feeling cramped or compromised. In some cases, this may mean a dedicated area in the living room, set apart from the dining space. In others, it could be a niche, a flexible furniture solution, or a space that is used differently throughout the day. **Alina Urbutytė** says:

"The home needs to be designed with a greater understanding of the rhythms of everyday life. Workspaces need to be practical in terms of their ergonomics, lighting, internet connection and the ability to work without disturbance for longer periods of time."



41%

of the working population work remotely at least one day a week.

27%

are very interested in a separate work space at home.

35%

find shared workspaces in residential areas somewhat or very interesting.

48%

Age
20-29

13%

Age
65-74

Share of people who finds shared workspaces in residential areas somewhat or very interesting.

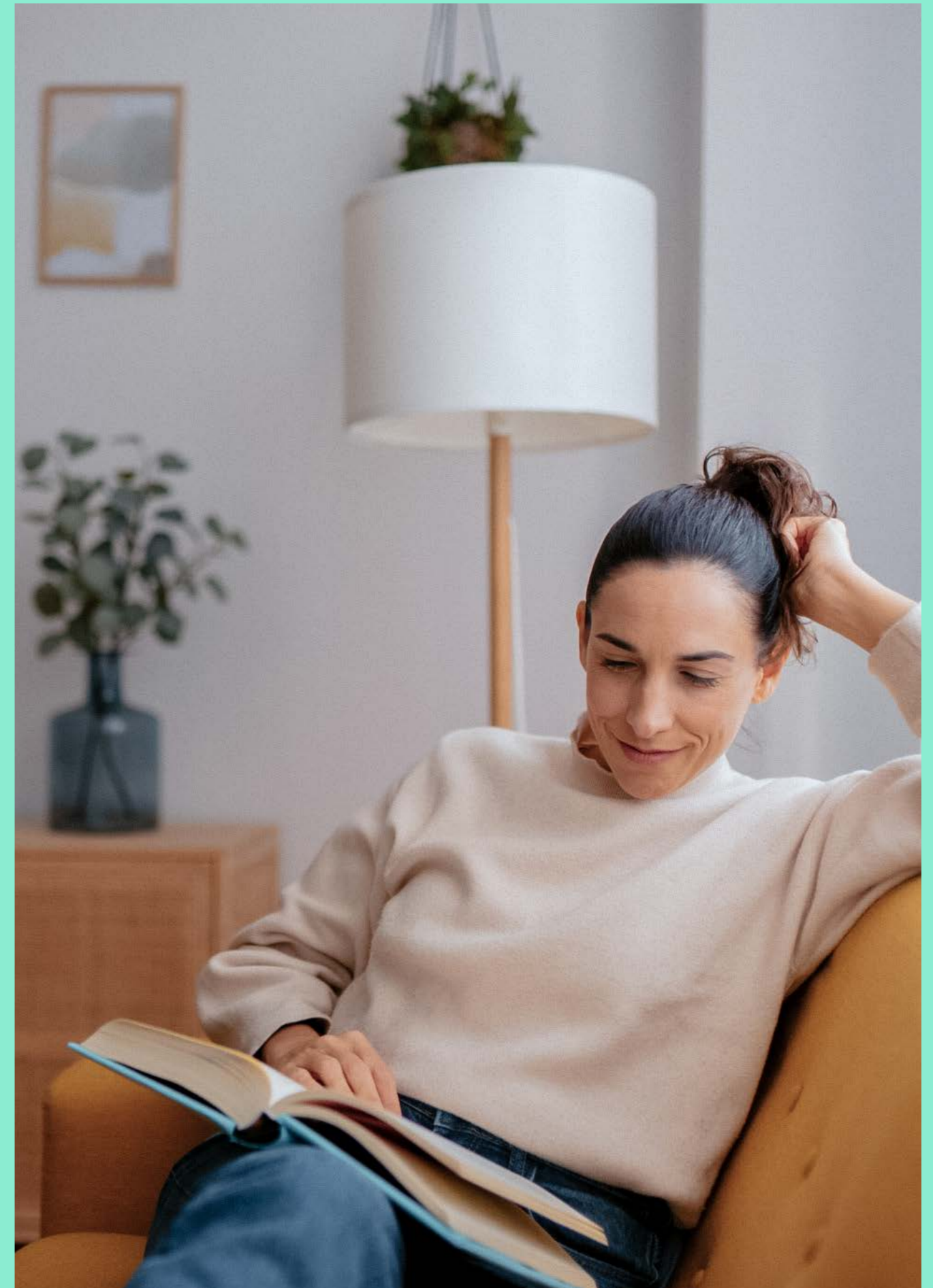
One way to meet these needs is through flexible furniture. Foldable desks and beds, or solutions that create temporary separation, can make a significant difference in smaller homes.

At the same time, it cannot be taken for granted that these kinds of solutions will meet universal acceptance. Our ideas about what a home should look like are deeply rooted, and they vary across both generations and markets. Younger households are often more open to innovative layouts and shared functions, while senior groups tend to prefer more traditional solutions. Expectations around what a home should look like are often quite clear, even if they differ across markets, and this makes visualisation important. Show homes and clear floor plans make it easier for people to understand how a smaller home can work in practice.

We are also seeing a growing demand for shared workspaces in neighbourhoods. Overall, 35% of respondents say they are interested, and the interest is highest among the youngest generations (48% compared to 35% on average).

Several projects are introducing coworking spaces where residents can book workstations and access shared facilities such as printers and high-speed internet. For many, these spaces serve as an important complement to the home, particularly in smaller apartments where it can be difficult to set aside a permanent workspace. Shared workspaces also help create new meeting points in everyday life and can strengthen the sense of community within the neighbourhood.

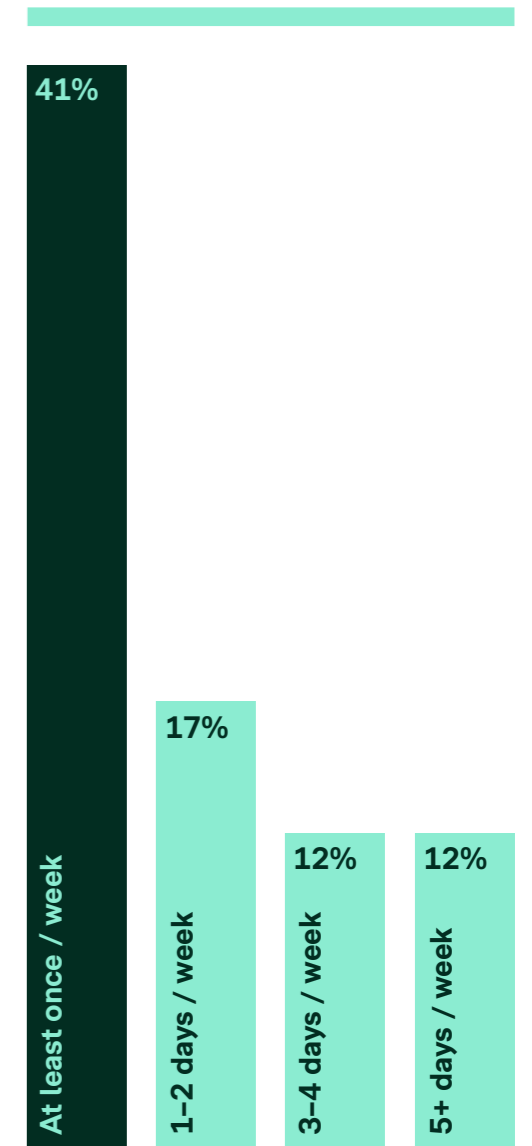
However, shared workspaces are still an area where many solutions need to be tested and developed. It is not enough to set aside a room and call it a coworking space. For it to work, the space needs a clear concept. Should it be a quiet place for focused work, or a more social and livelier environment? Should it be used for full working





days or just shorter sessions, and does it need to be booked in advance? Our experience of shared spaces shows that management and communication are just as important as the design itself. Even a well-planned space can quickly lose its value if it lacks clear guidelines and is used in the wrong way.

As the boundaries between home and work continue to blur, the need for smart, space-efficient homes is growing. As a society, we need to keep developing housing and neighbourhoods based on people's changing needs. At a time when much of life takes place closer to home, it is becoming increasingly important to create homes and neighbourhoods where people can spend all hours of the day and where all aspects of everyday life can be accommodated.



Share of the working population who work from home on a weekly basis.

What can make new-builds more appealing later in life?

Newly built homes offer modern standards, comfort and minimal maintenance – benefits that, on paper, should make them particularly attractive to a senior target group. Yet our study shows that interest in new-build neighbourhoods is relatively low among those aged 65–74. At the same time, an ageing population is reshaping housing demand across markets, creating a growing level of mismatch between the homes people live in and the homes they actually need. Understanding what drives this gap is key to developing housing that can better meet the expectations of this quality-conscious generation, and to shaping both neighbourhoods and wider society for the future.

Summary

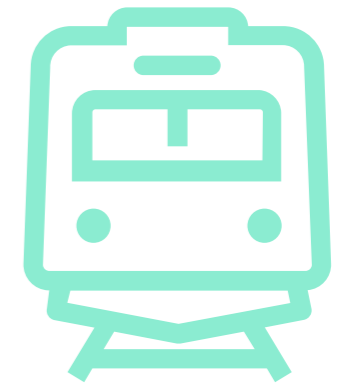
- New-build housing aligns with the needs of many seniors, but a low willingness to move and strong attachment to existing homes give rise to a clear paradox within this demographic.
- When seniors remain in larger homes, parts of the housing supply become locked, limiting mobility and contributing to wider market imbalance.
- To appeal to seniors, new-builds need to offer quality, character, independence and social connection within welcoming, mixed-generation neighbourhoods.

As many as 45% of people aged 65–74 state that they are unlikely to ever move, and only 19% expect their next home to be better than their current one. This highlights a low willingness to relocate which has clear implications for the housing market, as senior citizens have a tendency to remain in houses that are too big, or in older apartments in need of renovation. As a result, parts of the housing supply are effectively locked, limiting mobility and contributing to a structural imbalance in the market.

Consequently, it is increasingly important to understand how people want to live as they grow older. For many in this age group, the focus is on creating better conditions for the next phase of life. This may involve more accessible and functional homes, preferably located close to services and public transport. Another key aspect is the ability to continue living on one's own terms, in an environment that feels safe and comfortable. But emotional aspects are important too – neighbourhoods need to be inviting, friendly and aesthetically pleasing.

Today, 70% of seniors have lived in their current home for more than ten years, and 76% report that they are satisfied with their housing situation. For us as housing developers, this means that any potential new homes must be perceived as something genuinely attractive – a step towards a new and rewarding phase of life.

An important insight is that this group, in many respects, is similar to other demographics. Their circumstances and preferences vary, so planning housing based solely on age is a rather blunt approach. Across all age groups, people are highly motivated to make conscious choices and they have an expectation that a new home should represent a fresh, rewarding phase of life rather than a step down in quality of life. It is not age that matters, but experience – and this is something that leads to clear and high expectations of what people want from their next home.



34%

of those aged 65–74 cite a desire for a home that is easier to maintain as a reason for moving.

26%

of those aged 65–74 report a high level of interest in moving to a new-built housing area.

Our study shows that people aged 65–74 who are considering moving to a new home are looking for practical, functional benefits, preferably in a neighbourhood that is already established and aesthetically appealing. A residence that is easy to maintain and close to services will be seen as particularly attractive. More specifically, 34% cite a desire for a property that is easier to maintain as their reason for wanting to move, while 51% consider proximity to services and public transport to be one of the most important factors when choosing where to live. Factors such as energy efficiency and modern technical solutions also play an important role in perceptions of quality. Some examples from among our responses include:

40%

of those aged 20–29 report a high level of interest in moving to a new-built housing area.

“You can rely on everything working from the get-go.”

“Better energy efficiency.”

Many are looking for homes that are designed to meet everyday needs: good storage, spacious kitchens, room for existing furniture, and the ability to host family and friends. According to **Helene Dahlborg**, Project Marketing Manager at Bonava, more classic qualities, such as sunlight, pleasant views and a calm and safe environment, also carry significant weight in the decision-making process. “Residential projects with appealing architecture that connect to the character of the area, and that also offer qualities such as generous balconies with the option of glazing, are perceived as particularly attractive,” says **Helene Dahlborg**.

But despite these preferences largely aligning with what new-build housing offers, the willingness to move into a new-build neighbourhood remains significantly lower among the senior group. This creates a clear tension – something of a paradox for the senior generation. Only 26% report a high level of interest in moving into a new-build development, compared with 40% among those





Factors that lower barriers to moving into new-build housing:

Support independence

High quality

Warm and inviting environment

aged 20-29. Perceptions of high costs and concerns about financial uncertainty are among the main reasons:

"New apartments are usually very expensive."

"Too expensive for a pensioner."

Beyond finances, feelings of uncertainty around newly built housing also play a role. New-build neighbourhoods can sometimes be perceived as lifeless and lacking character:

"New residential areas are often sterile and without flair."

"Often too far from the city centre."

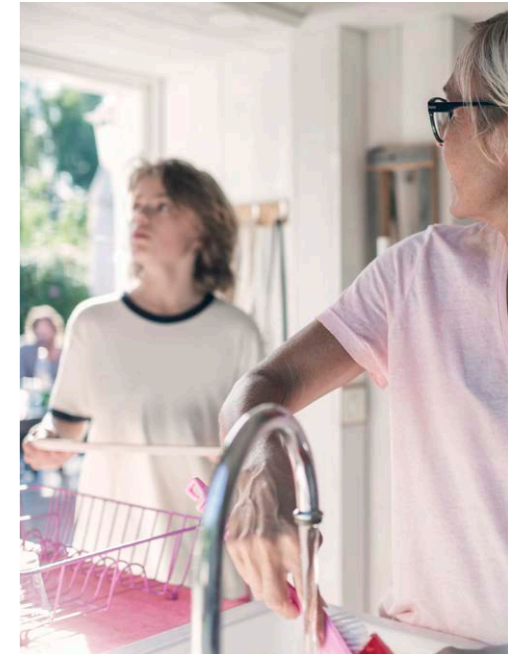
The senior generation often has extensive experience of shaping their homes over time and refining their living environment. This also brings clear expectations in terms of execution and sense of quality. When new-build housing meets these expectations, its appeal increases. The opportunity to be involved early in the process and influence material choices and design can therefore be an important factor. This provides a greater sense of control and the ability to create a home that reflects individual preferences.

Social context is another key factor. Many prefer vibrant environments where different generations mix, rather than areas aimed at a specific age group. **Kristina Hallberg**, Project Marketing Manager at Bonava, explains that opportunities for spontaneous interactions and a sense of community in everyday life play an important role when it comes to comfort and wellbeing. "Something as simple as saying hello and being on a first-name basis with your neighbour can increase your sense of belonging, and this in turn reduces feelings of loneliness," says **Kristina Hallberg**.

People also tend to develop a strong sense of attachment to places, and this can be another reason for not wanting to move. The home holds memories, relationships and a sense of identity that are difficult to recreate. This also includes relationships with neighbours and the sense of security that comes from being part of a neighbourhood over a long period of time. As a result, many choose to stay put, even when their home is no longer ideal. To change this, we need alternatives that not only address practical needs but which also offer something clearly better – a new quality of life.

This means homes that support independence and offer high levels of quality in a warm, inviting environment. Homes that provide sufficient storage to enable a move from a larger home, and spaces that are suitable for entertaining. These neighbourhoods, located close to services, should bring together people of different generations, within spaces and structures that actively encourage interaction and a sense of community across age groups.

Enabling a shift of this kind will likely require broader collaboration and bigger changes. The economic and policy-related barriers remain significant, and there is a clear need for dialogue on how incentives and frameworks can support increased mobility among seniors, a more balanced housing market and, ultimately, a greater quality of life.



Summary

Creating places and environments where people can thrive, and where future generations can grow up, is about so much more than just four walls. As a leading housing developer, Bonava is keen to understand what matters to people, and this report has been written with that purpose in mind. It explores what creates vibrant and welcoming neighbourhoods from a human perspective, and its insights remind us of what we need to consider as we shape the communities of tomorrow.

Safety. As housing developers, we have a responsibility to always take safety and security into account when designing new neighbourhoods, and we know that perceptions of safety are affected by how neighbourhoods are planned and designed. This means drawing on our own knowledge and experience, while also seeking the views of future residents and neighbours at an early stage.

Adaptability. The homes and neighbourhoods we create need to support a flexible working life and provide the right conditions for working from home, either in the home itself or within nearby co-working spaces. At the same time, many jobs cannot be done from home, so these spaces also need to be adaptable for other purposes.

Demographic elasticity. One in three young adults does not plan to have children. Homes and neighbourhoods must be adapted to accommodate different family structures and the people we choose to live with – for shorter or longer periods. Functionality and flexibility are becoming key considerations in housing as well as in communal spaces, and this calls for a more flexible approach to urban planning that works across age groups and meets the changing needs of different generations.

A challenge that society and the housing market is facing is a low willingness to move to a new home later in life. Our survey confirms this. However, those seniors who want to move are very clear about their preferences: they want a more pleasant home that is easier to maintain, located in a warm and inviting neighbourhood inhabited by multiple generations. It is also important that the new home should be close to their current residence, with enough space to host family and friends. The attractiveness and location of the neighbourhood will continue to play a key role when developing new residential areas, especially for the senior generation.

To find new ways forward, we are committed to exploring solutions in collaboration with other stakeholders who play a role in shaping society. We call for an ongoing dialogue with authorities, local communities and policymakers to create the right conditions. As we develop homes intended to last for more than a century, we also have a responsibility to look beyond today's target groups and create structures that can work across the generations. Together, we can create homes and neighbourhoods where people can thrive, belong and live happily for generations to come.



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