

LIFE AT HOME RESEARCH 2023

India

Insights Debrief

YouGov®



01 Summary from 2023 quant research

02 Background & methodology

03 Current and future home

04 Needs of home

05 Moving

06 Sleep

07 What people do at home

08 Digging deeper

This is an internal Customer & Consumer Insights report to be used internally for business planning. It is a research deep dive into the survey data for your market, so doesn't follow the Life at Home Report narrative.

Feel free to use the content to support your commercial, and communication plans and be sure to reference 'Life at Home Report 2023'.

Note: External embargo on 10th January 2024.



01

Summary from 2023 quant research

Life at Home | India



Current and future home

63% of Indians feel positive about their current life at home, and 71% have a positive outlook on their future in the next two years

For 50% of Indians, home is their favourite place to be.

Their main concerns around life at home are their physical health (34%), the health of the people around them (30%), and their mental health (29%).

The most important aspect of an ideal home is that it helps them be physically or mentally stronger (34%). When they imagine their life in an ideal home, the top outcomes are feeling happy, relaxed and content, and confident.



Needs of home

Each emotional need is important to at least 65% of Indians, but security (74%), comfort (74%), and enjoyment (73%) rank highest

The needs which are *often* fulfilled at home for the largest shares of Indians are comfort (58%), security (56%), and belonging (53%).

Aspirations and accomplishment are the needs for which the gaps between importance and fulfilment are the largest. Those needs have the largest shares of Indians who find the respective needs important but never or rarely experience fulfilment at home.



Moving

56% of Indians are planning to move in the next two years, and an additional 18% are planning to stay in their current home but renovate

The likelihood of moving is highest for Generation Z and decreases somewhat with age. The older generations are more inclined than Generation Z to renovate. Homeowners are less likely than renters to plan to move, but more likely to renovate.

Among those planning to move, the main reasons are getting closer to something/someone (22%), getting more space (20%), and getting away from current area (15%). 18% want to get a more sustainable home.



Sleep

The number one key element in Indians' habits for best sleep is their favourite pillow (31%)

It is of similar importance to Indians as to the global average (28%), and slightly more important to women than to men (33%, 28%)

Other key elements for which IKEA products can be of help are complete darkness which is mentioned by a total of 26%, a night light (16%), and a heavy cover (9%).

02

Background & methodology

Background and purpose

IKEA’s overall purpose of the Life at Home quantitative survey in 2023 was to know more about consumers’ realities at home.

Target group & sample size

The survey has been completed among a nationally representative sample of people aged 18+ in 38 countries, where a total of 37 428 interviews were collected.

Data collection

This report is based on the dataset from the Life at Home 2023 quantitative study conducted by YouGov, with India’s data in focus.

The quantitative Life at Home study was conducted as an online survey (CAWI - computer-assisted web interviewing) among YouGov panelists in 38 countries. The data collection was completed in the period from May to June 2023.

Weighting of data

Data for each country has been 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. Chile and New Zealand have been given added weight to make their results equal to those from other countries despite their lower numbers of interviews.

Publication of results

On any publication of the results of the survey, YouGov must be stated clearly as the source. Prior to the publication of the results of the survey, YouGov must have the opportunity to approve the press release or other use of the results. The purpose is solely to ensure that we can vouch for the use of the results in technical analysis terms.

Country	Collected interviews
INGKA countries	
Australia	1 007
Austria	1 008
Belgium	1 010
Canada	1 016
China	1 009
Croatia	1 007
Czech Republic	1 005
Denmark	1 010
Finland	1 016
France	1 017
Germany	1 007
Hungary	1 011
India	1 013
Ireland	1 007
Italy	1 009
Japan	1 004
Netherlands	1 005
New Zealand	506
Norway	1 008
Poland	1 010
Portugal	1 015
Romania	1 005
Serbia	1 007
Slovakia	1 003
Slovenia	1 007
South Korea	1 006
Spain	1 006
Sweden	1 006
Switzerland	1 013
UK	1 037
USA	1 006
Other countries	
Chile	507
Estonia	1 007
Latvia	1 005
Lithuania	1 005
Malaysia	1 074
Philippines	1 015
Singapore	1 019
Total	37 485

Definitions and base sizes

Global

Countries included:
Australia, Austria, Belgium,
Canada, Chile, China, Croatia,
Czech Republic, Denmark, Estonia,
Finland, France, Germany,
Hungary, India, Ireland, Italy,
Japan, Latvia, Lithuania, Malaysia,
the Netherlands, New Zealand,
Norway, the Philippines, Poland,
Portugal, Romania, Serbia,
Singapore, Slovakia, Slovenia,
South Korea, Spain, Sweden,
Switzerland, the United Kingdom,
and the United States of America.

Base: 37 428

India

Base: 1 013

Generations

Generation Z

Ages 18-27
(Base: 290)

Millennials

Ages 28-42
(Base: 354)

Generation X

Ages 43-58
(Base: 312)

Baby Boomers

Ages 59-77
(Base: 53)

N.B. n<100

Other ages not included in split

Children at home

Children at home

At least one child 0-17 years old living
in the household
(Base: 481)

No children at home

No children 0-17 years old living in
the household
(Base: 532)

Genders

Female

(Base: 490)

Male

(Base: 523)

Home

Owners

Apartment – Owned
House – Owned
(Base: 659)

Renters

Apartment – Rented
House – Rented
(Base: 199)

Other types of housing not included
in split

03

Current and future home

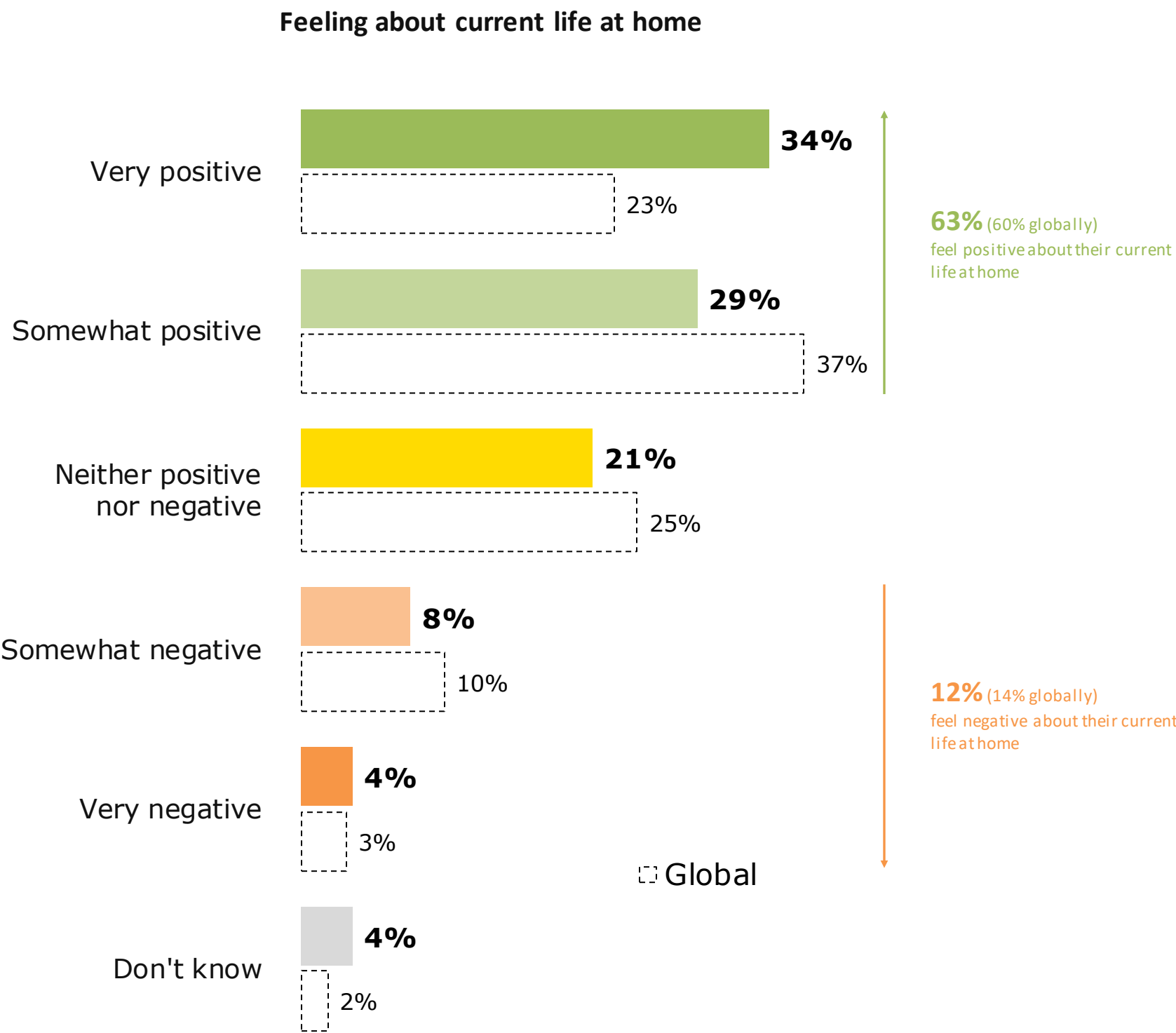
63%

of Indians feel positive about their current life at home

12% feel negative, while another 21% are neutral. This means that compared to overall global results, the share of Indians who are positive about their home life is somewhat larger (63%, 60%) and the share who are negative is a little smaller (12%, 14%).

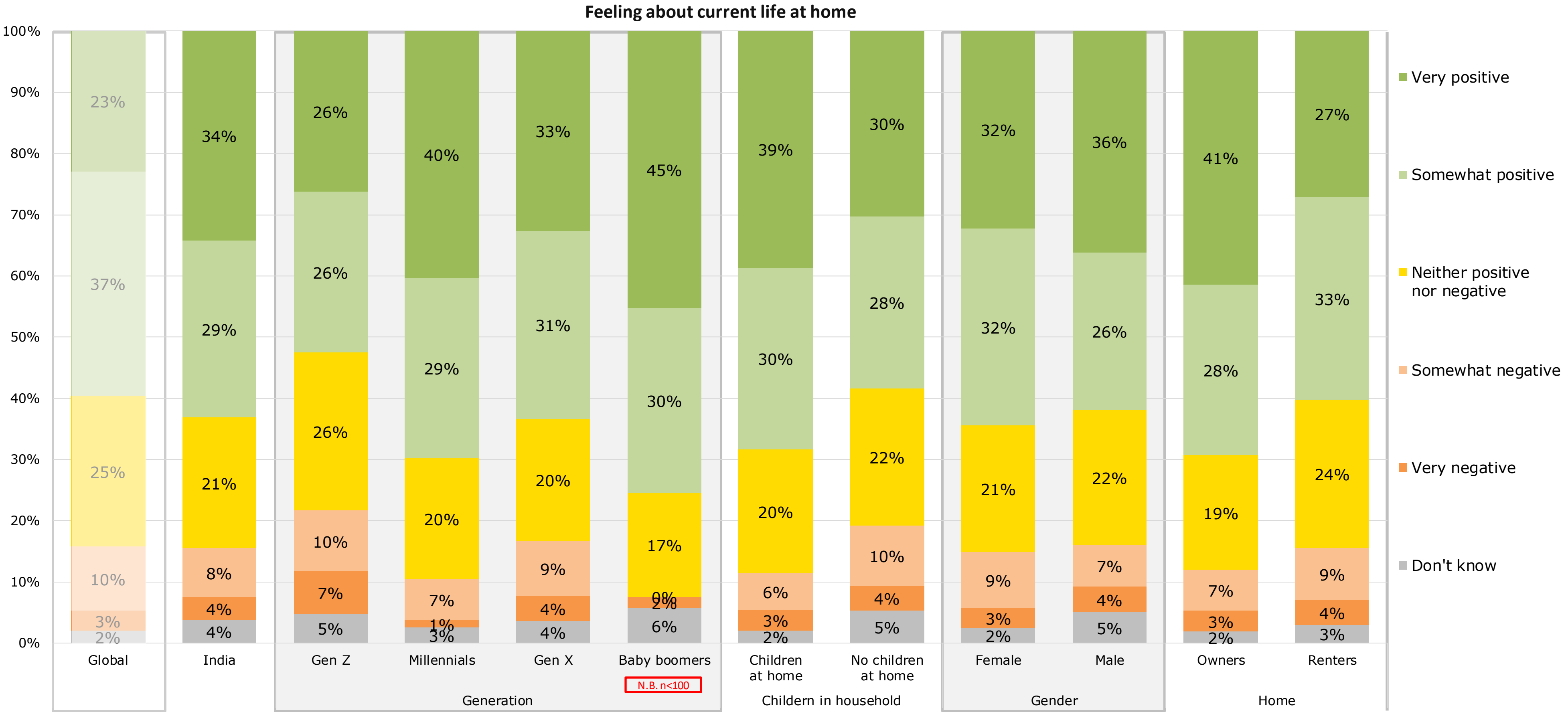
Among the generations, Generation Z is the least likely to feel positive (53%), whereas Millennials are the most likely (70%). Those living with children in the household are more positive than those without (68%, 58%), and people who own their homes are more positive than those who rent (69%, 60%).

Question: How do you feel about your current life at home?
Base: All (India 1 013, Global 37 428)



Feeling about current life at home

Question: How do you feel about your current life at home?
Base: All (India 1 013, Global 37 428)



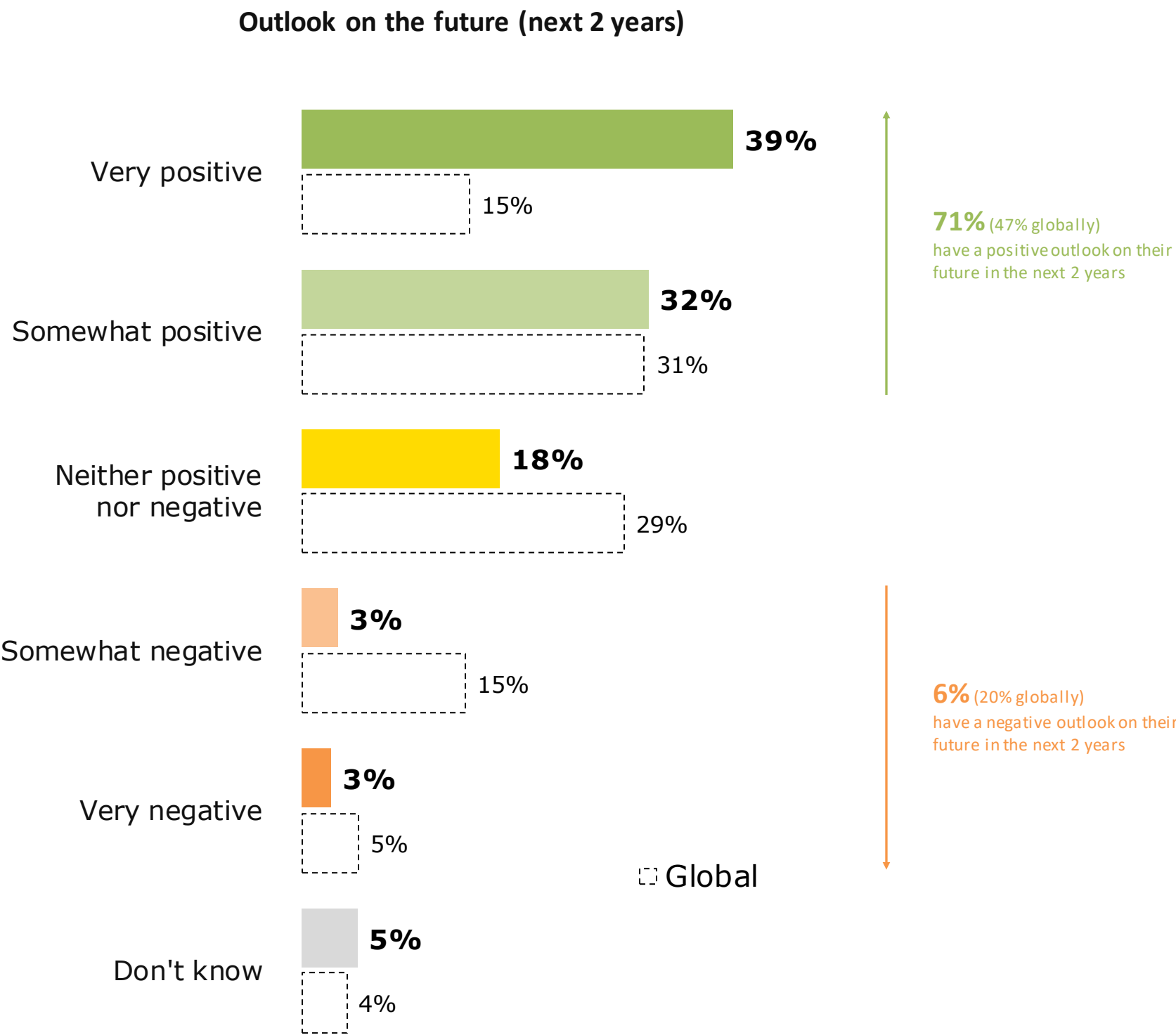
71%

of Indians have a positive outlook on their future in the next two years

6% feel negative, and 18% are neutral. Compared to global results, the share of Indians who have a negative outlook on the future is much smaller (6%, 20%), while the share who have a positive view is considerably larger (71%, 47%).

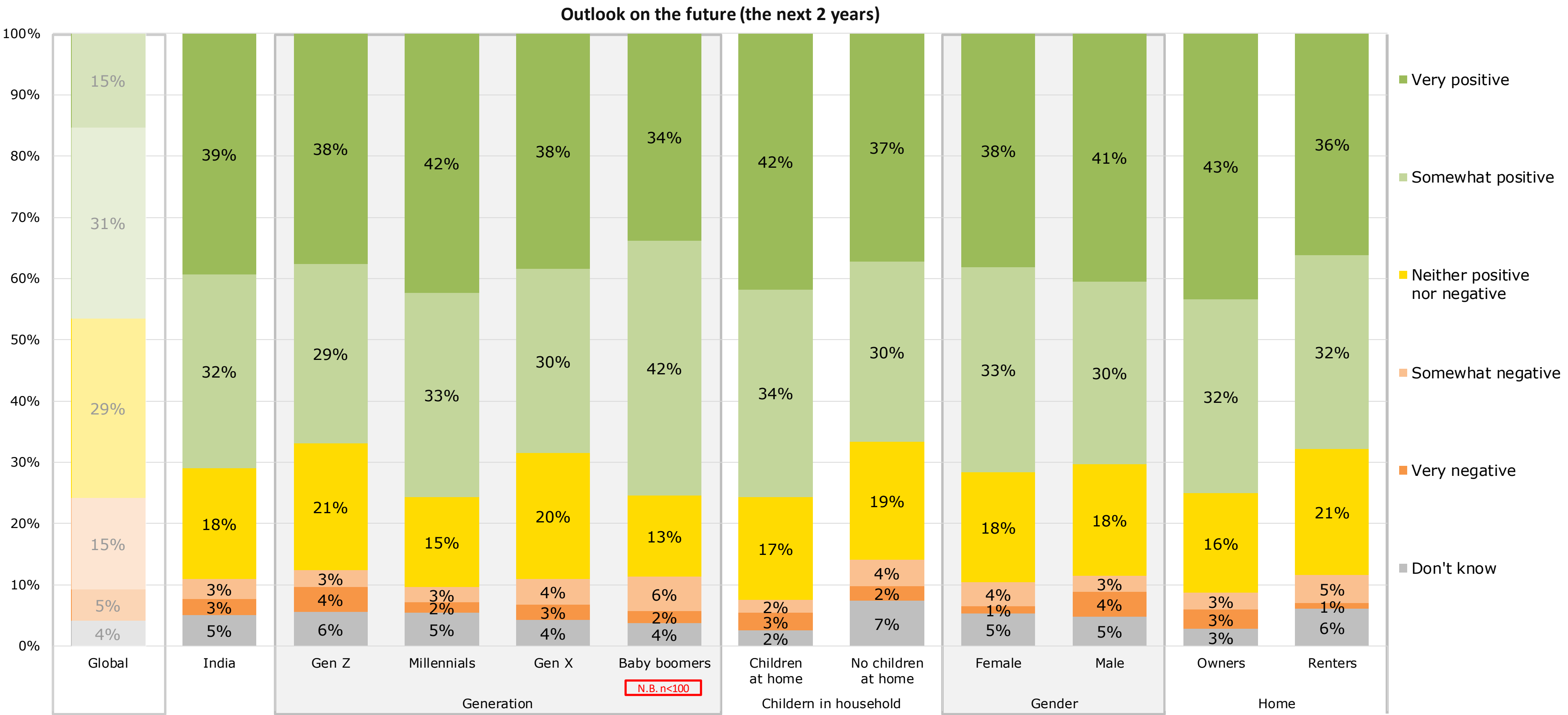
Millennials (76%), those living with children (76%) and homeowners (75%) are all groups whose likelihood of having a positive outlook is higher than that of the average.

Question: In general, how would you describe your outlook on your future (the next 2 years)?
Base: All (India 1 013, Global 37 428)



Outlook on the future (the next 2 years)

Question: In general, how would you describe your outlook on your future (the next 2 years)?
Base: All (India 1 013, Global 37 428)

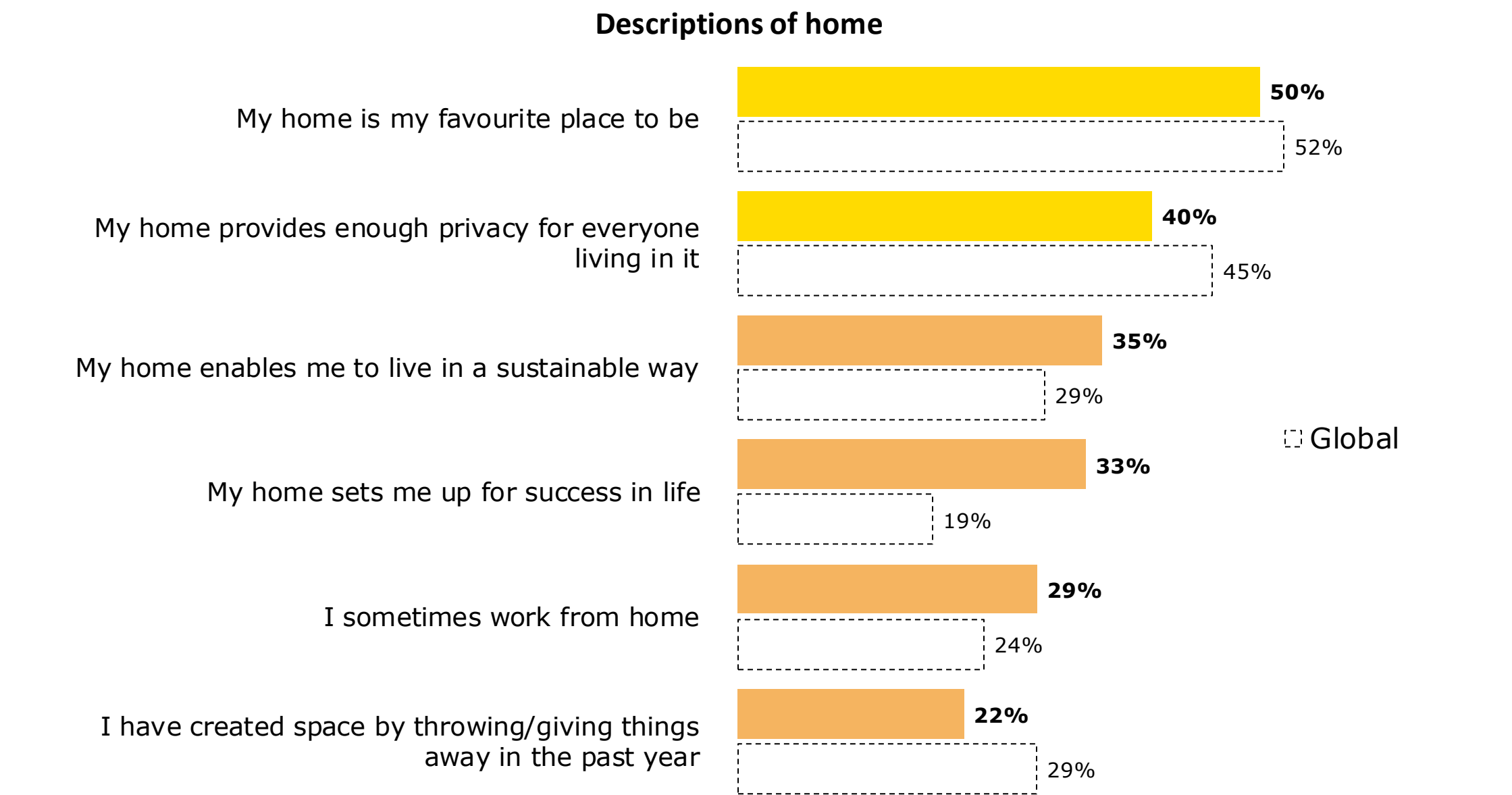


For 50% of Indians, their home is their favourite place to be

The likelihood of feeling this way seems to increase with age, with Generation Z being the least likely to do so (43%). It is also higher among homeowners than those who rent (54%, 43%).

In terms of having homes that enable them to live sustainably, Generation Z is behind the other generations (29%), and renters are less well off than homeowners (30%, 38%).

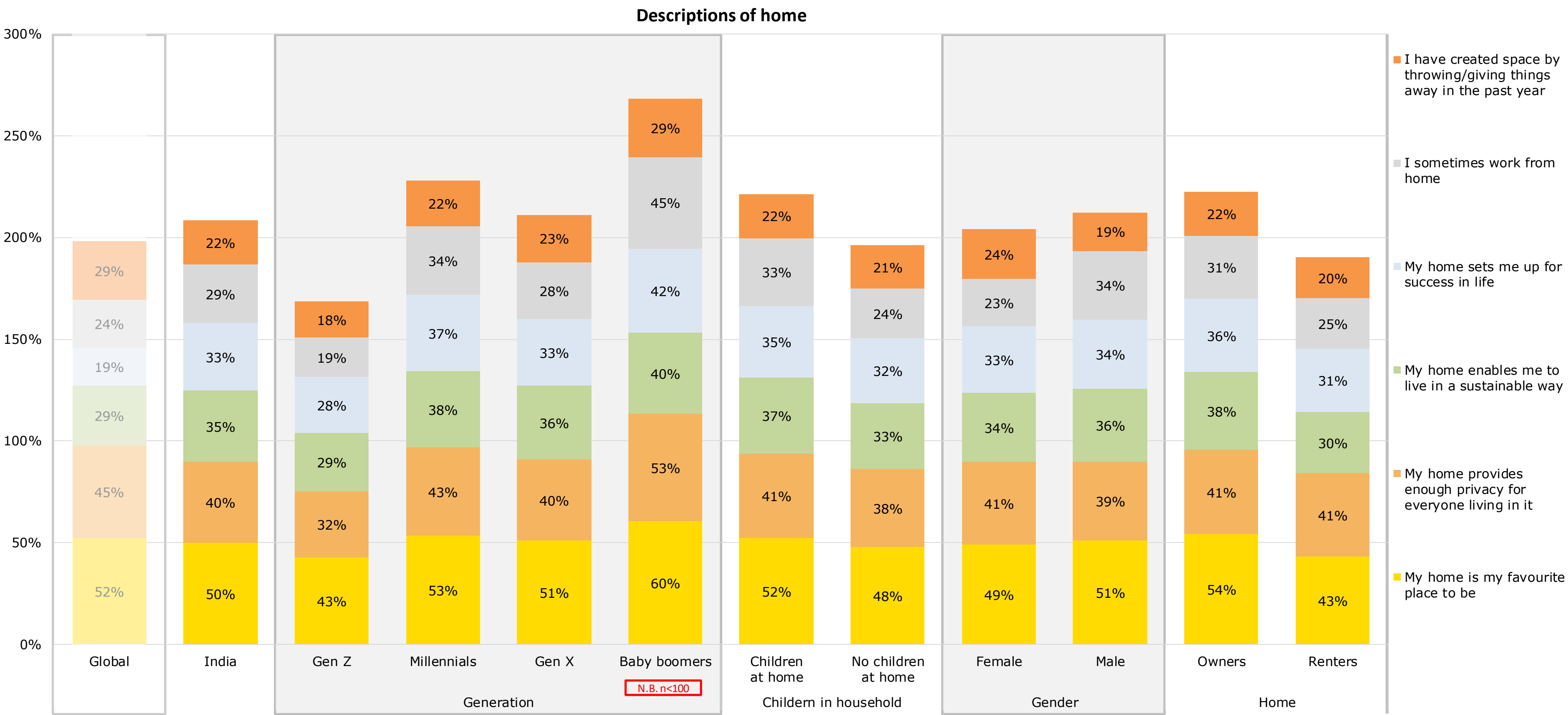
Compared to the global average, Indians are more likely to say that their home sets them up for success in life (33%, 19%).



CURRENT AND FUTURE HOME

Descriptions of home

Question: Which of these apply to you/your home? Please select all that apply
Base: All (India 1 013, Global 37 428)

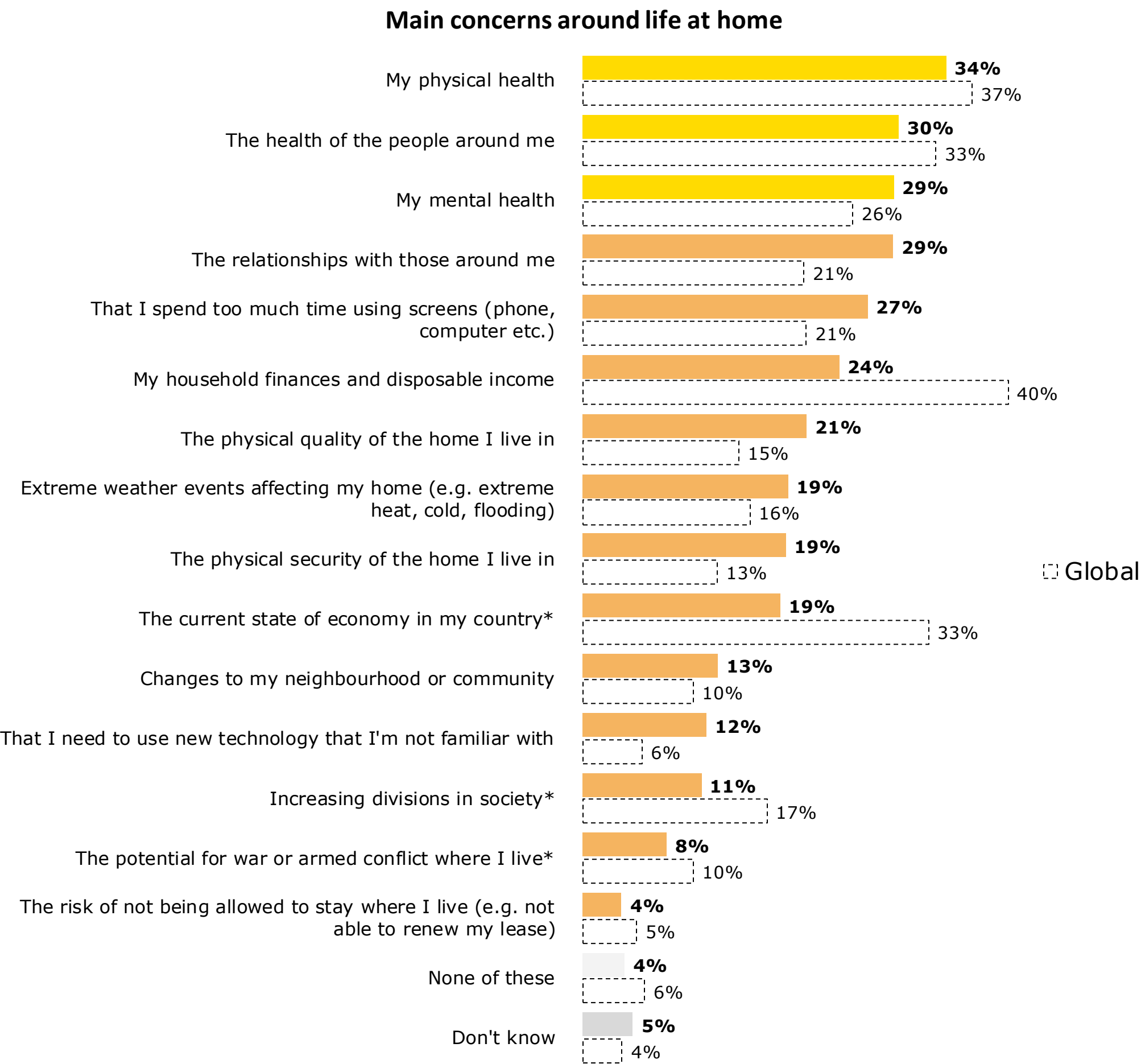


34% of Indians say their physical health is a top concern

Each of their top three concerns around their life at home is related to health – their own physical and mental health (34%, 29%), as well as the health of people around them (30%).

Indians’ propensity to consider their household finances and disposable income a concern is considerably smaller than that of the global average (24%, 40%), as are their worries about the current state of economy in their country (19%, 33%).

Instead, Indians are more likely than the global average to be concerned about their relationships with those around them (29%, 21%).



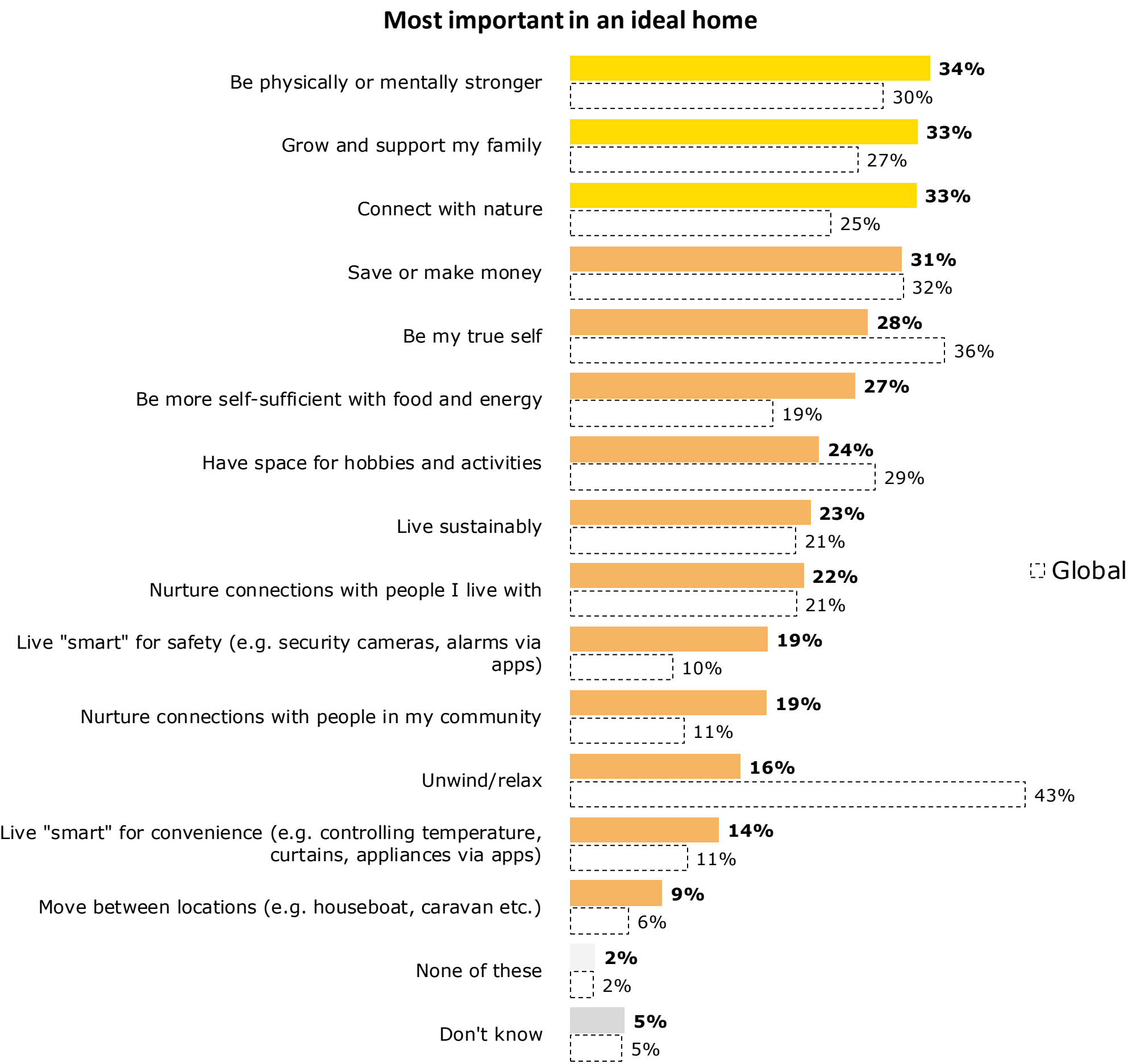
Question: Which of these concerns you the most with regard to your life at home? You can select up to 5 answers
Base: All (India 1 013, Global 37 428, *global except China 36 419)

34% of Indians find being physically or mentally stronger especially important in an ideal home

More than 1 in 3 mention it as an important thing for their ideal home to help them do, although Generation Z (29%) are less likely than the older generations to choose this option.

Growing and supporting their family (33%), and connecting with nature (33%), are of relatively similar importance across different groups. Each of these is also more important to the Indians than to the global average.

The global average is on the other hand substantially more likely than the Indians to want their ideal home to help them unwind/relax (43%, 16%).



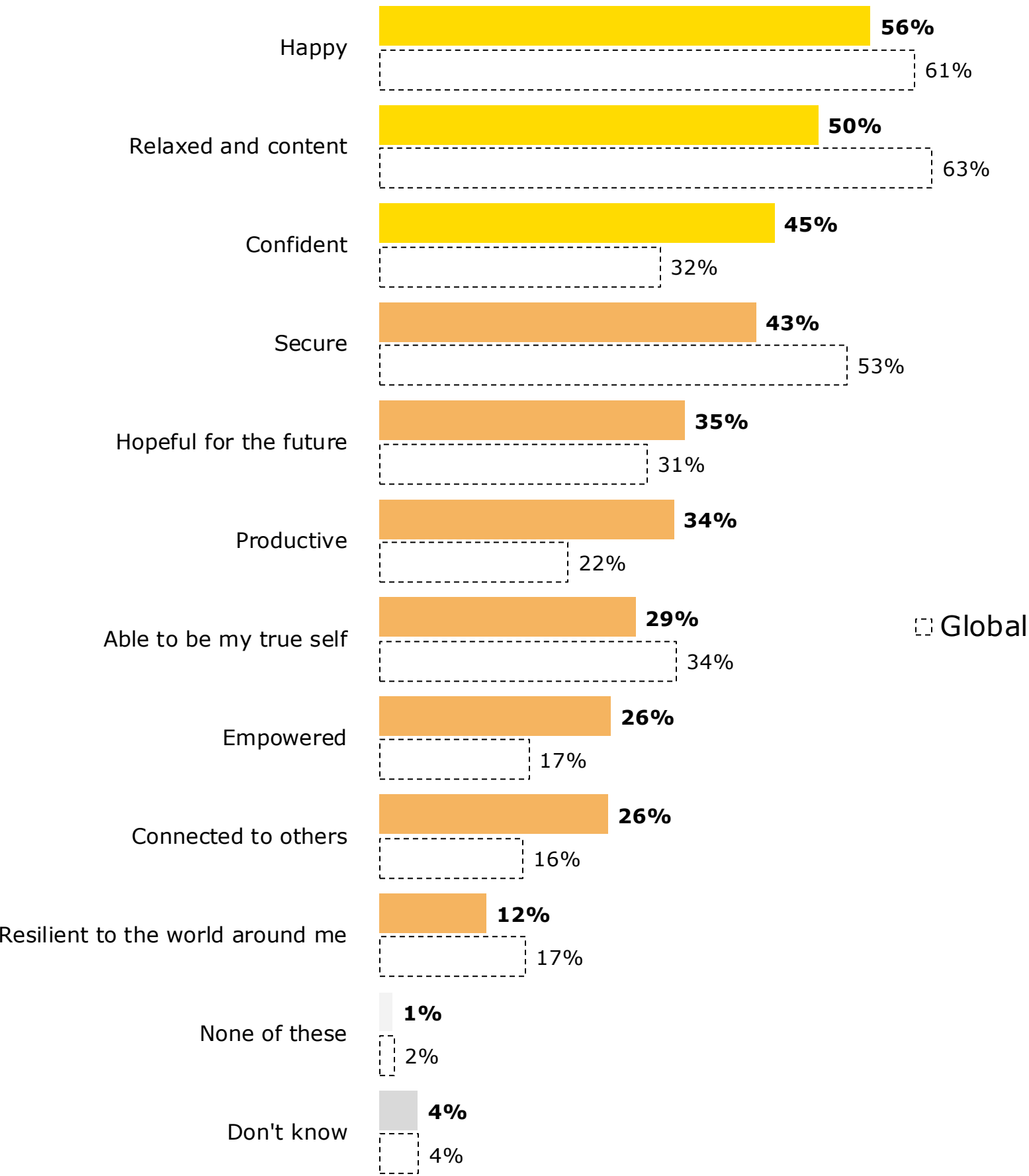
Question: Which of the following aspects would be the most important to you in an ideal home? You can select up to 5 answers. A home that helps me ...
Base: All (India 1 013, Global 37 428)

Feeling happy, relaxed and content, and confident are Indians' top outcomes of life in an ideal home

Among the generations, Generation Z (41%) is the least interested in having their ideal home make them feel relaxed and content. Women are somewhat more likely than men to wish to feel this way (53%, 47%).

The Indians’ wish for their home to make them feel confident makes them stand out compared to the global average (45%, 32%). Similarly, they are more interested than the average in feeling productive (34%, 22%).

Main outcomes of life in an ideal home



Question: Imagine your life in a home that is ideal for you. How would that home make you feel? You can select up to 5 answers
Base: All (India 1 013, Global 37 428)

04

Needs of home

Pyramid of needs at home

From 10 years of IKEA Life at Home research, 8 needs have been identified that contribute to a better life at home. These needs work together: some play more foundational roles, whilst others contribute to meaningful moments, adding color and warmth. This chapter will look into 7 of the 8 needs - *aspirations* is covered in the questions about future outlook and ideal home. Survey questions included the definitions below, to ensure that respondents could understand the terms as intended.



Needs: Importance at home

This slide shows the share of Indians who find each need important at home.

Security (74%) and *comfort* (74%) come out as the most important, followed by *enjoyment* (73%), *aspirations* (72%), *accomplishment* (72%), *nurturing* (70%), and *belonging* (68%). *Control* (65%) is the need found important in the home by the smallest share of Indians.

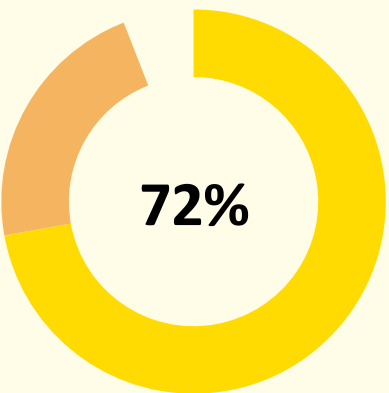
The total span between the most and the least important needs is just 9 percentage points. Since each need is important to a clear majority of people, none of them should be disregarded.

When interpreting the results, the reader should also consider the possibility that someone who is used to having security and control in the home takes them for granted and therefore does not consider them important.

Question: How often do you feel the following at home and how important are they to you?
Base: All (India 1 013)

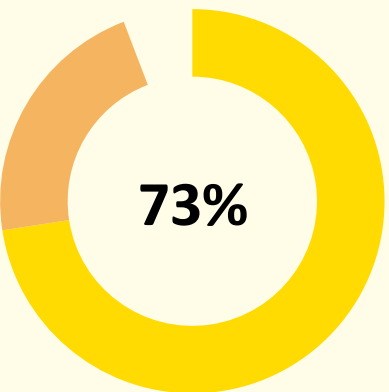
FUTURE DREAMS

Aspirations

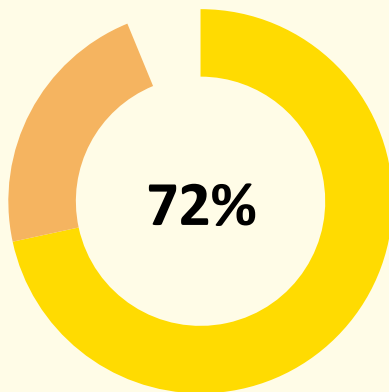


MEANINGFUL MOMENTS

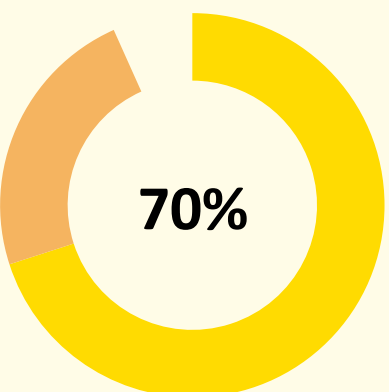
Enjoyment



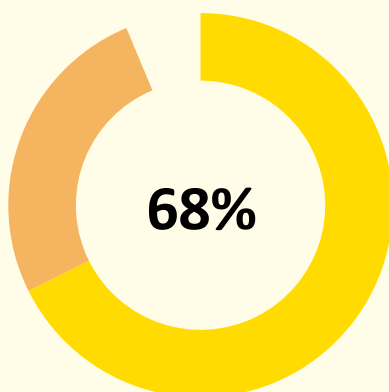
Accomplishment



Nurturing



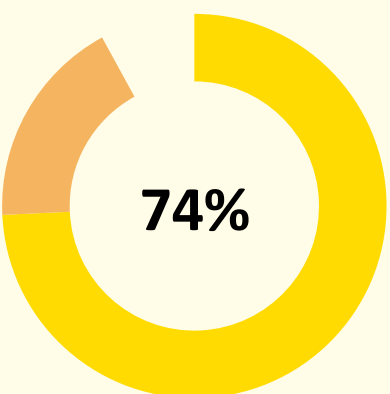
Belonging



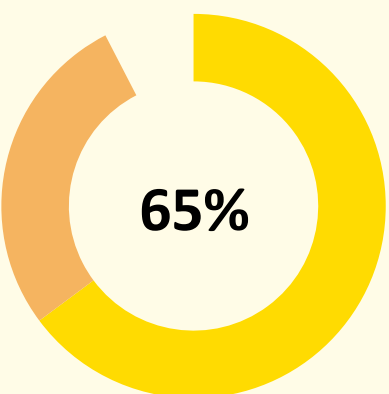
Important
Not important

CARE & COMMUNITY

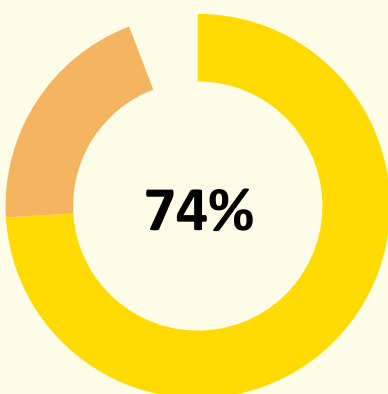
Security



Control



Comfort

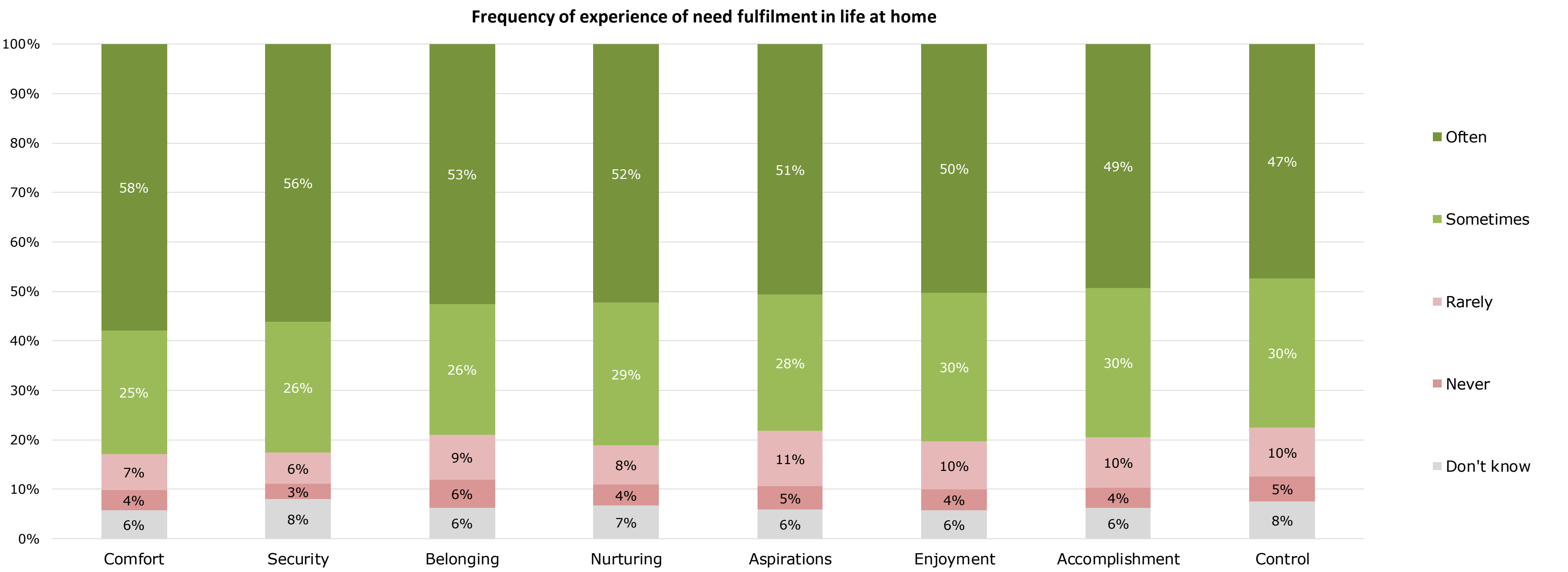


EVERYDAY ESSENTIALS

Needs: Fulfilment at home

Below, the needs are ranked by the share who *often* feel that they are fulfilled at home. The order turns out to be largely similar to that in IKEA’s needs pyramid framework, but there are also some important differences. In the pyramid, *comfort*, *security*, and *control* make up the bottom layer called *everyday essentials*. In the ranking, *comfort* and *security* are the top two needs in terms of fulfilment, but *control* is last of all. The second pyramid layer is *care & community*, containing *belonging* and *nurturing*. They appear in third and fourth place in the ranking, close to what would be expected. The third pyramid layer is *meaningful moments*, made up of *enjoyment* and *accomplishment*. For these needs, the positions in the ranking match the pyramid precisely. At the top of the pyramid, *aspirations* is alone in the layer called *future dreams*. In terms of need fulfilment at home for Indians, aspirations is actually in fifth place. It is reassuring that fulfilment of central needs such as *comfort* and *security* is experienced relatively frequently, but it could be argued that they should ideally always, or at least often, be fulfilled at home. It should also be pointed out that the span between lowest and highest share of people who have each need fulfilled often is just 11 percentage points, which can help explain why the order of needs is not quite what one might expect in relation to the pyramid framework.

Question: How often do you feel the following at home and how important are they to you?
Base: All (India 1 013)

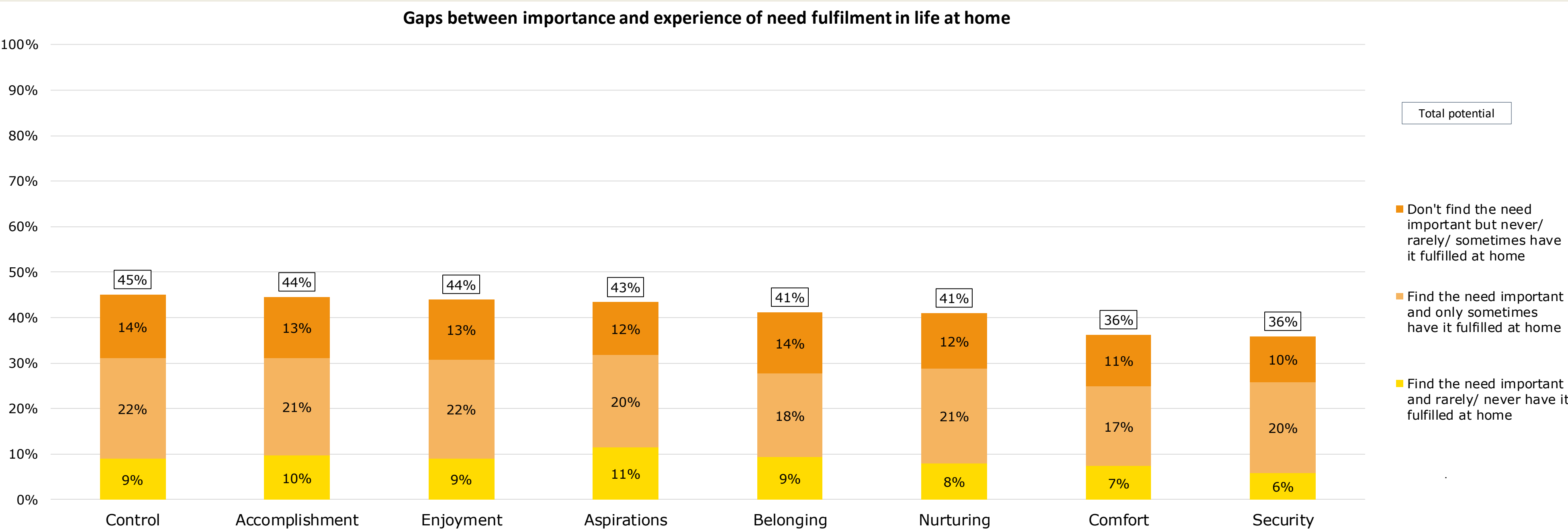


Needs: Gaps between importance and fulfilment

The gap between the importance of a need and the frequency of experiencing that the need is fulfilled represents untapped potential for IKEA. People who find that the need is important, but are currently feeling it at home less than often, would by implication be grateful for assistance in finding ways to fulfil it. The chart below shows three levels of potential in the form of gaps. The most urgent focus area for IKEA is at the bottom – people who find the need important and are currently rarely or never having it fulfilled at home. One step up is the second priority, the group who find it important and are sometimes, but not often, experiencing it at home. Finally, IKEA potentially has the ability to help people who do not think that the need is important, but who are experiencing it less than often. For this third group we are making the assumption that the need’s importance is latent, and that they would be better off if it was fulfilled more frequently. These three groups are added up to a total potential value, displayed at the top of the chart.

The top six needs all have similar shares of total potential (41%-45%), but the top priority gaps are somewhat larger for *aspirations* (11%) and *accomplishment* (10%) than the rest. Still, there are meaningful shares of people who need assistance within the area of each need included. IKEA will need to prioritise, and a good first step is to better understand who the people in the gaps are, so that communication can be addressed to them. In the following sub-chapter, we look into one need at a time to find the drivers and barriers to help.

Question: How often do you feel the following at home and how important are they to you?
Base: All (India 1 013)



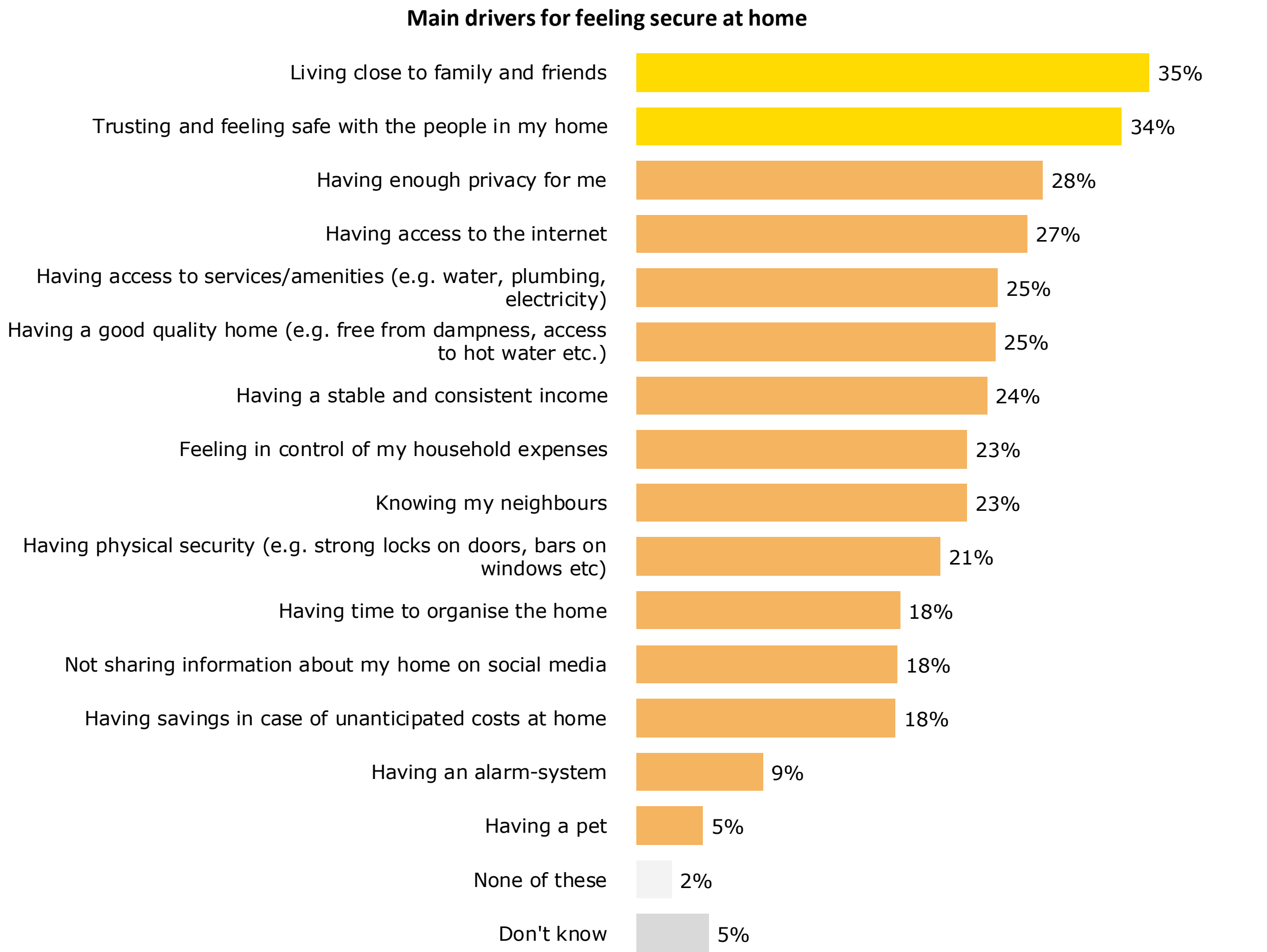
Deep-dive per need

For 35% of Indians, living close to family and friends is a top driver of feeling secure in their current home

It is more important to women than to men (40%, 31%), but less important to Generation Z (29%) than to the older generations.

Trusting and feeling safe with the people in their home is especially important to Millennials (39%), who have this as their top choice.

Just 5% of Indians as a whole, but 27% of pet owners, mention that having a pet is a factor which helps them feel secure at home.

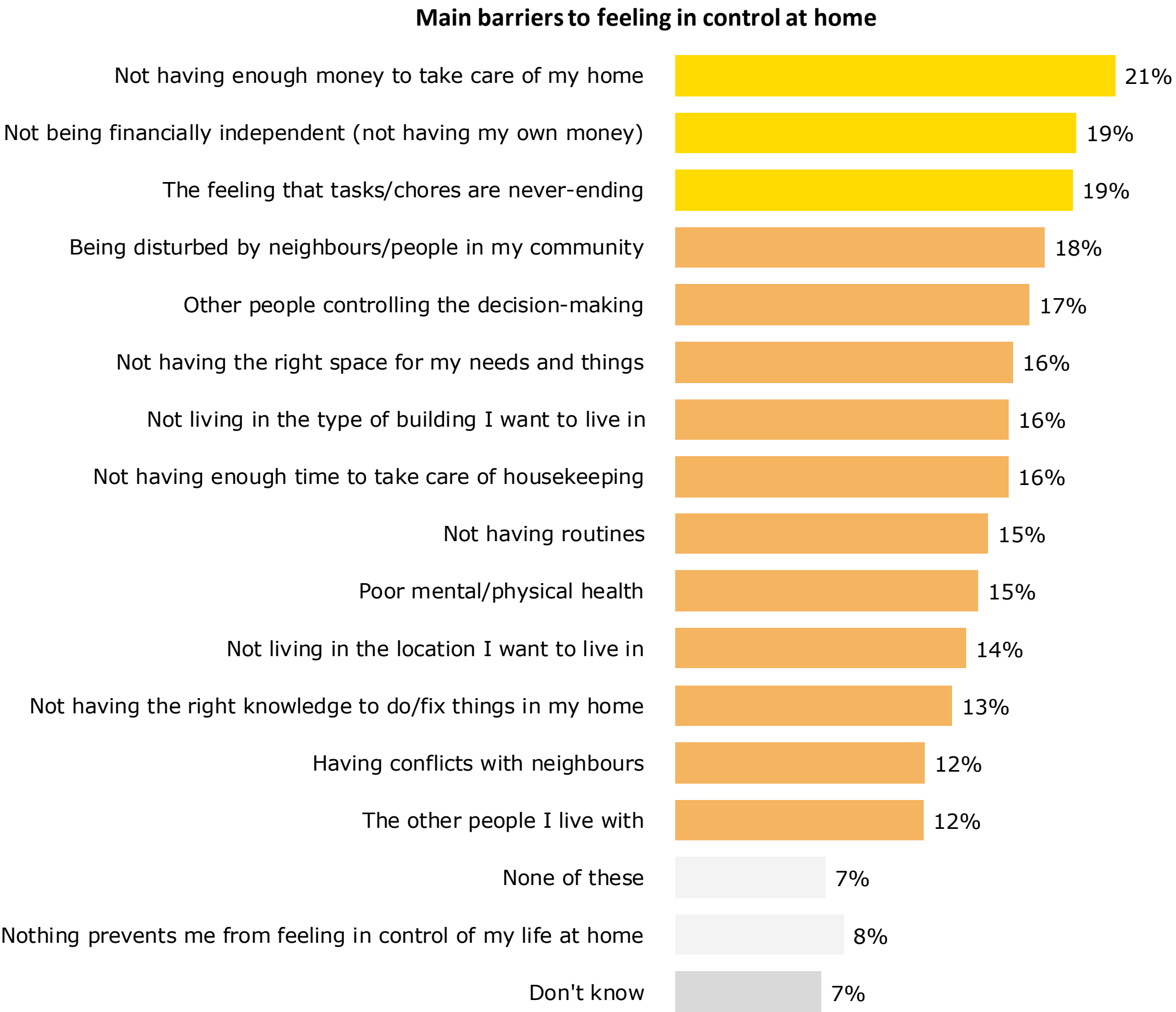


Question: Which of these help you the most to feel secure in your current home? You can select up to 5 answers
Base: All (India 1 013)

Not having enough money to take care of their home prevents 21% of Indians from feeling in control of their life at home

Its importance as a barrier is somewhat higher to women than to men (24%, 19%). The same is the case for not being financially independent (23%, 16%) and the feeling that tasks/chores are never-ending (22%, 17%).

Among the generations, Generation Z stands out as most likely to mention lack of financial independence (25%), while Millennials are overrepresented regarding the feeling that tasks/ chores are never-ending (24%).

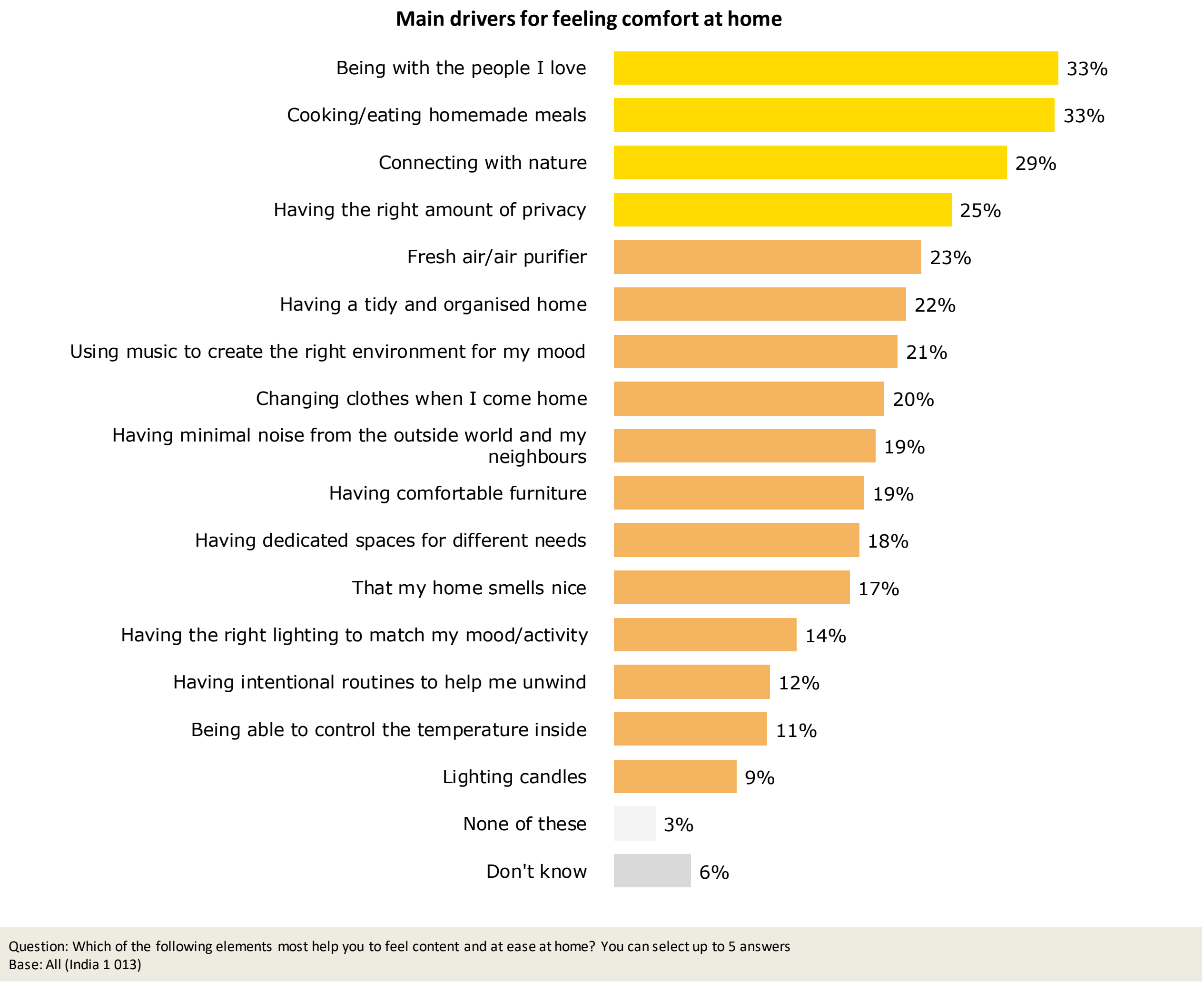


Question: Which of these prevent you from feeling in control of your life at home? Please select all that apply
Base: All (India 1 013)

33% of Indians find being with the people they love a main element in feeling comfort at home

An equal share picks cooking/eating homemade meals. This is more important to women than to men (37%, 28%), as is having the right amount of privacy (29%, 21%).

Overall, there are relatively few differences between the preferences of groups when it comes to drivers of comfort at home, but Generation Z are less likely than the older generations to value both homemade meals (28%) and fresh air/air purifier (18%).

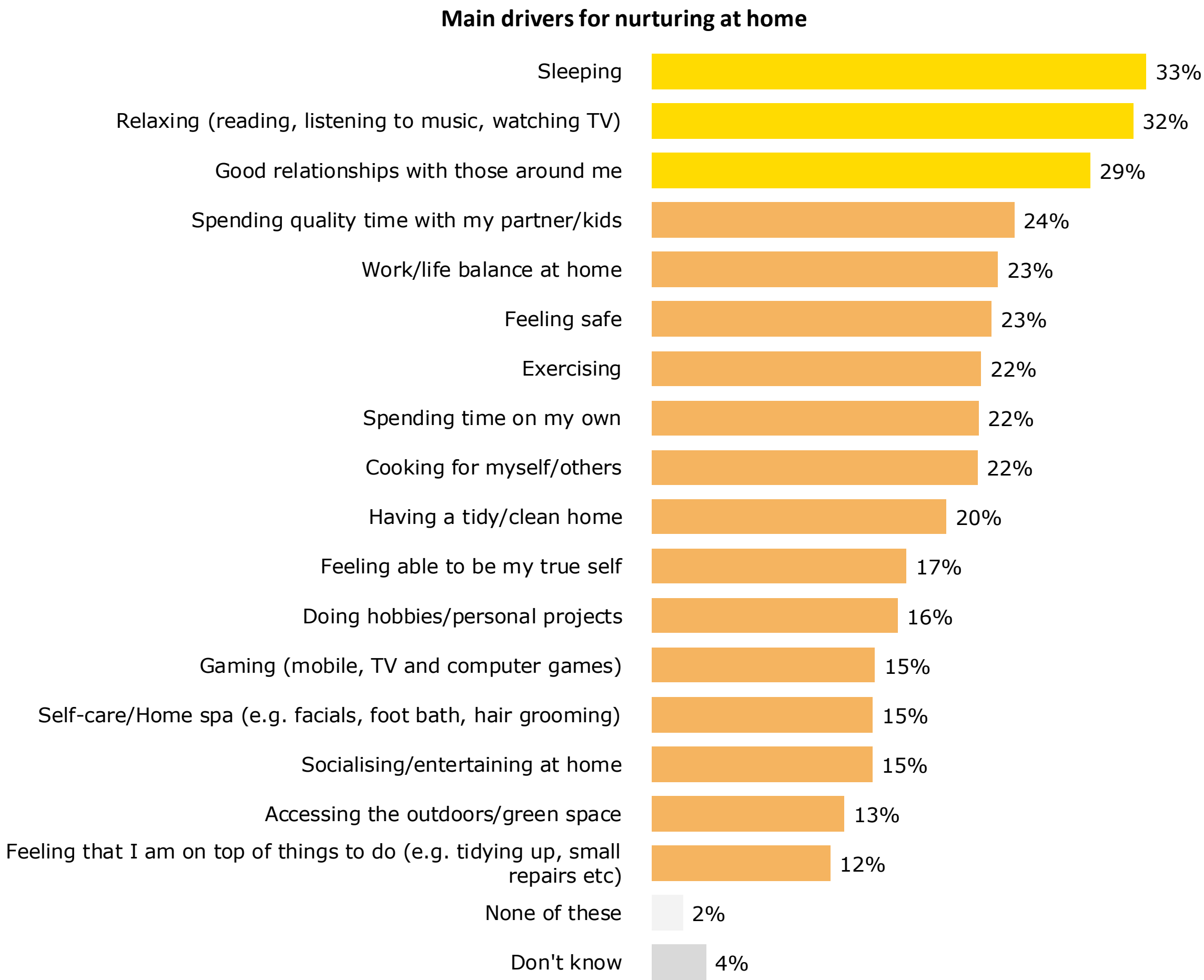


33% of Indians find sleeping to be of top importance for nurturing at home

With relaxing (reading, listening to music, watching TV) in second place (32%), taking it easy is a central theme in how Indians want to be helped to maintain a sense of mental wellbeing at home.

Having good relationships with those around is in third place with 29% of all Indians choosing this.

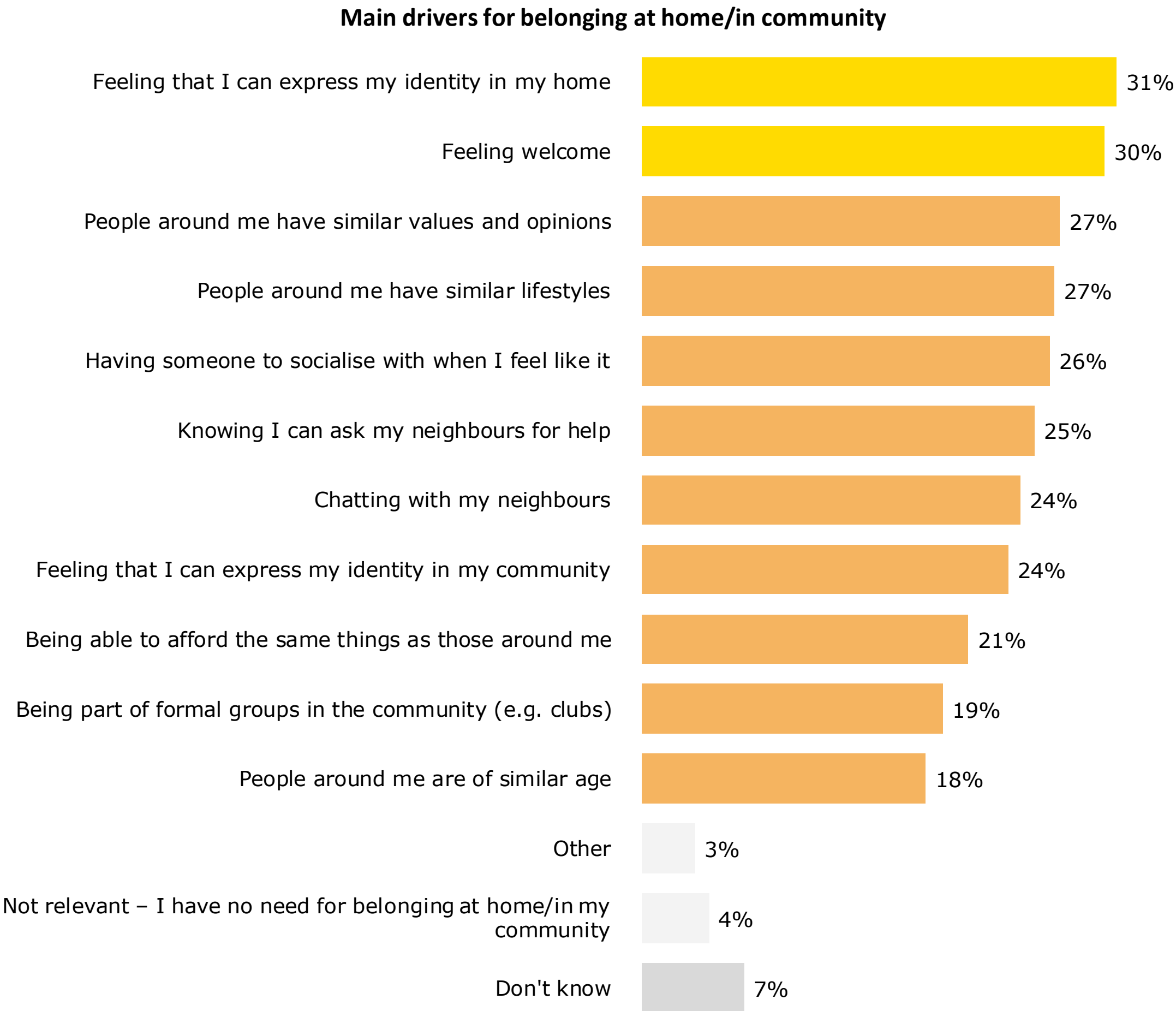
Spending quality time with partner/kids is chosen by 24% of all, and by 31% of those who live with children in the household. Millennials (29%) are the generation most likely to mention this, as well as work/life balance at home (28%).



Feeling that they can express their identity in their home helps 31% of Indians to feel a sense of belonging where they live

Millennials are more likely than Generation Z and Generation X to mention this (36%, 26-27%). Homeowners also stand out compared to renters in this regard (34%, 26%).

Homeowners are also more likely than renters to pick many of the other options, including that people around have similar values and opinions (29%, 24%), people around have similar lifestyles (29%, 21%), and knowing that they can ask their neighbours for help (28%, 19%).

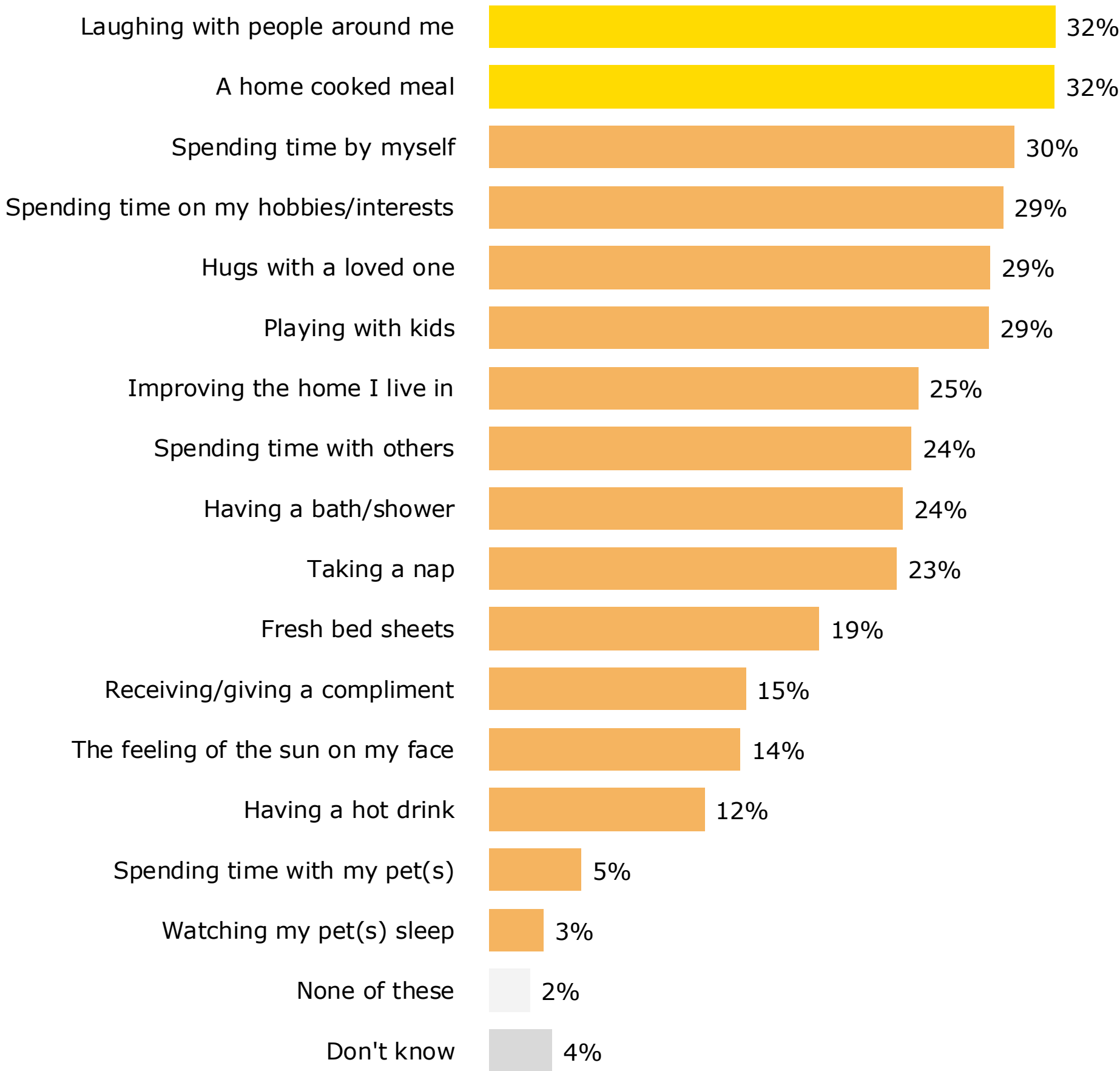


Laughing with people around them is a top driver of enjoyment at home for 32% of Indians

Home cooked meals are mentioned by an equal share. Both of these aspects are of similar importance across groups, with the exception of Generation Z who are somewhat less interested in them. Their top driver for enjoyment is spending time by themselves (30%), followed by spending time on hobbies/interests (29%).

Among pet owners, 31% choose spending time with their pets. 18% of pet owners pick watching their pets sleep.

Main drivers for enjoyment at home



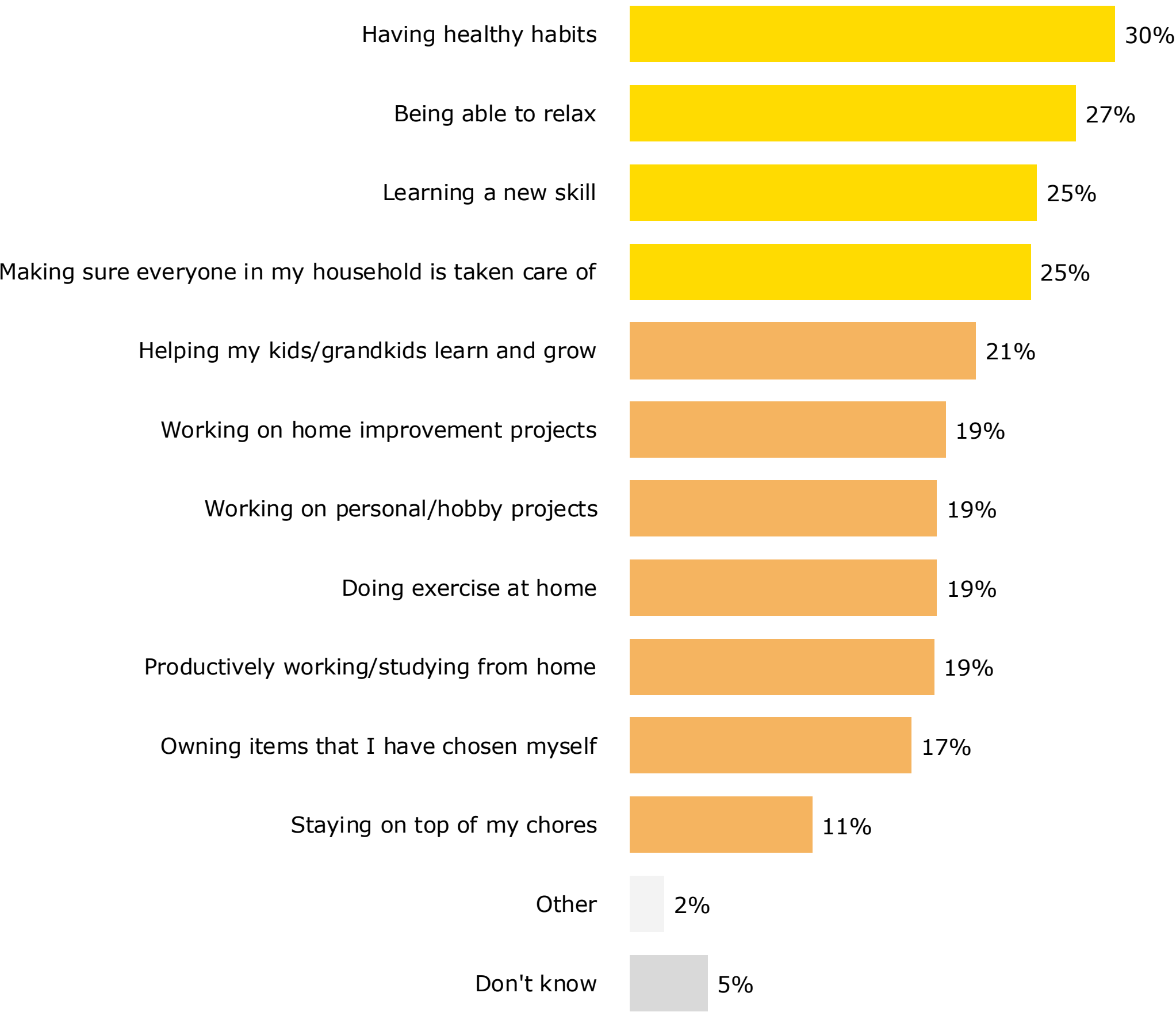
Question: Which of these bring you most joy in your life at home? You can select up to 5 answers
Base: All (India 1 013)

Having healthy habits is a main driver for feeling accomplishment at home for 30% of Indians

When asked to choose up to 3 things that give them the biggest sense of pride and progress at home, 3 in 10 choose this. Slightly fewer pick being able to relax. Learning a new skill is mentioned by 1 in 4, as is making sure that everyone in their household is taken care of.

Generation Z are somewhat less likely than the rest to choose having healthy habits (25%) and making sure everyone in their household is taken care of (18%), but the most likely to pick learning a new skill (32%).

Main drivers for feeling accomplishment at home



Question: What gives you the biggest sense of pride and progress at home? You can select up to 3 answers
Base: All (India 1 013)

05

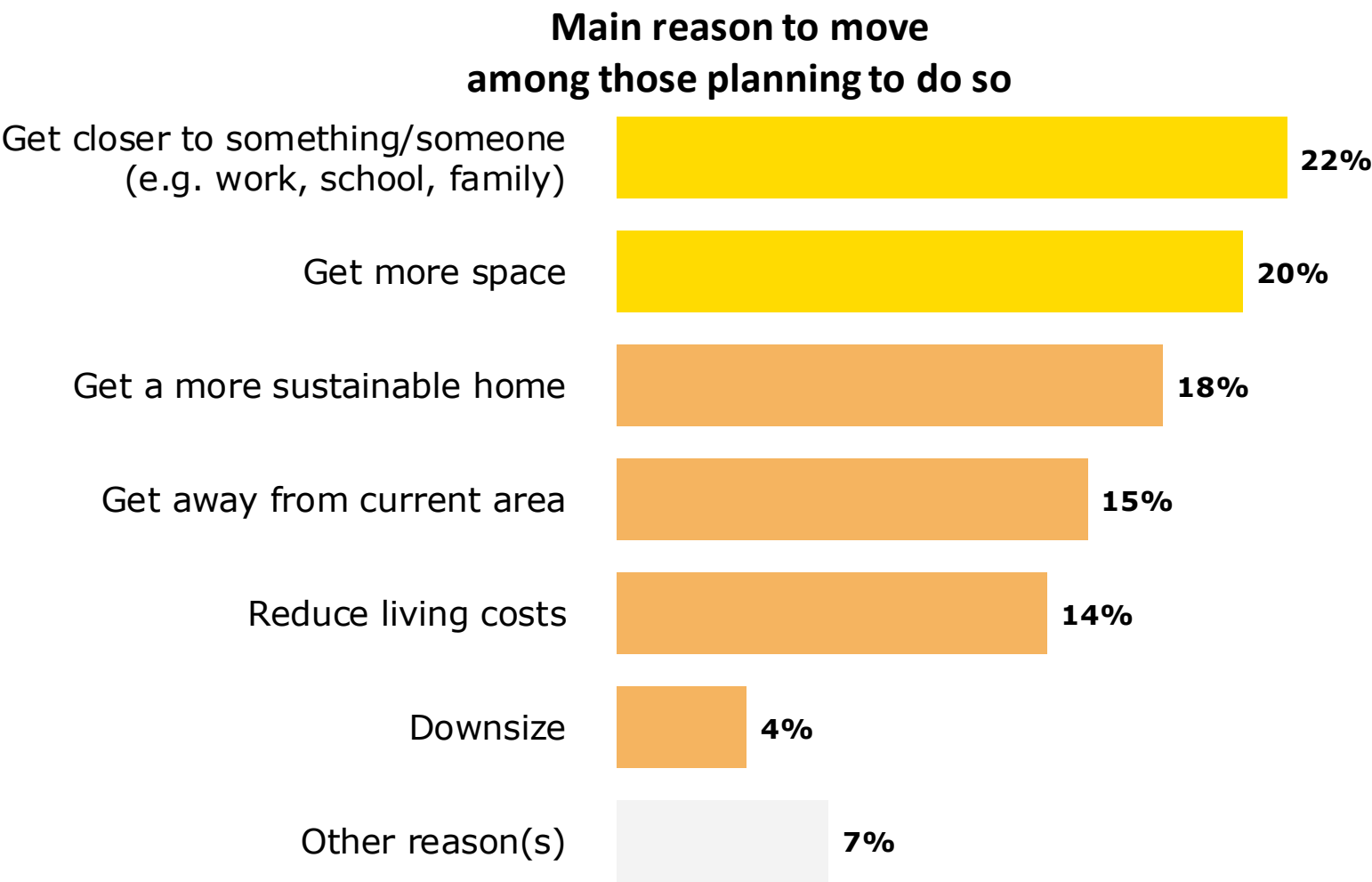
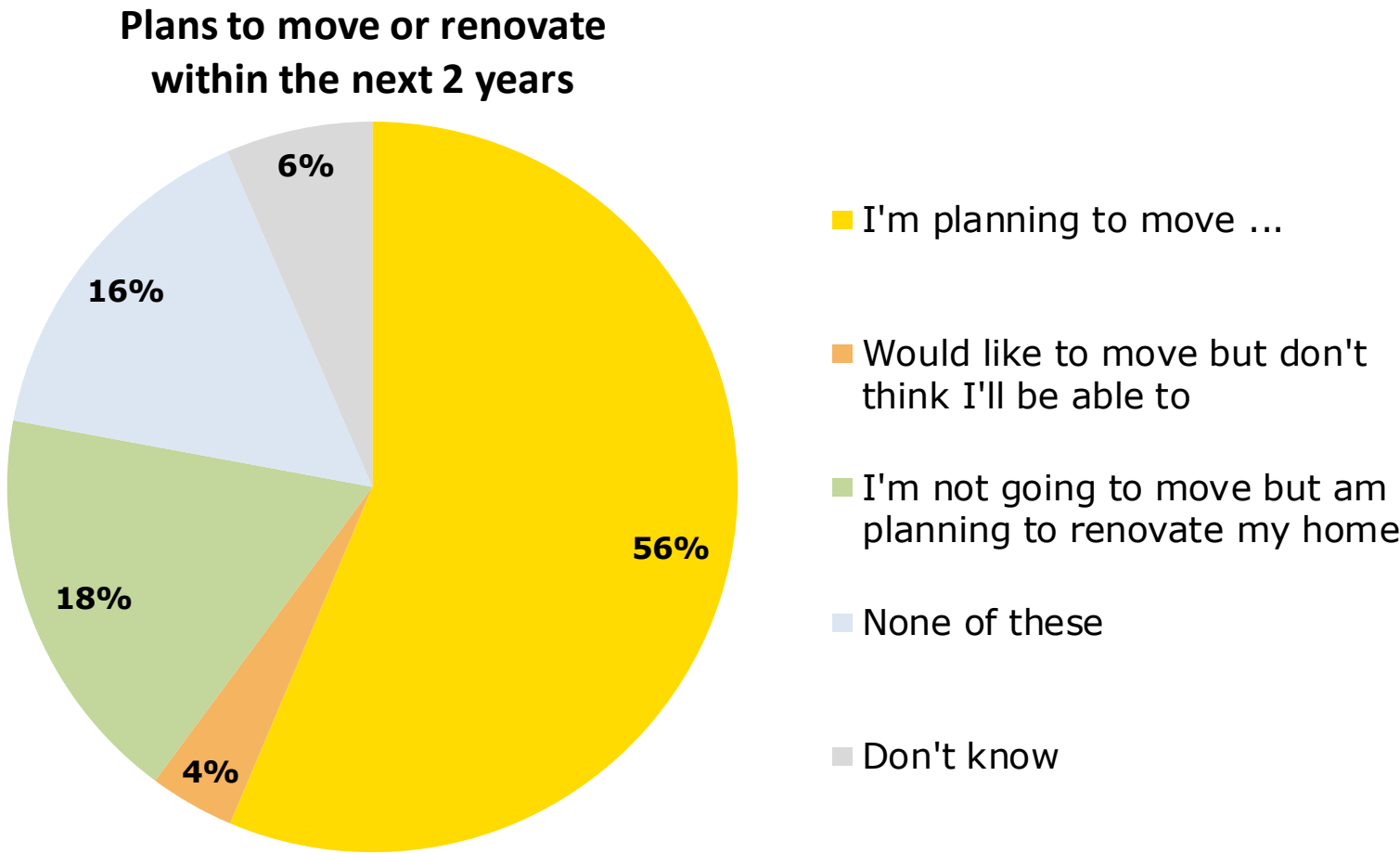
Moving

56% of Indians are planning to move in the next two years

An additional 4% would like to move but don’t think they’ll be able to, and 18% are planning to stay where they are but renovate.

The likelihood of moving is higher among Indians than the global average (56%, 34%). It is highest for Generation Z (61%) and then seems to decrease somewhat with age. The older generations instead appear more inclined than Generation Z to renovate. Homeowners are less likely than renters to plan to move (52%, 74%), but more likely to renovate (23%, 5%).

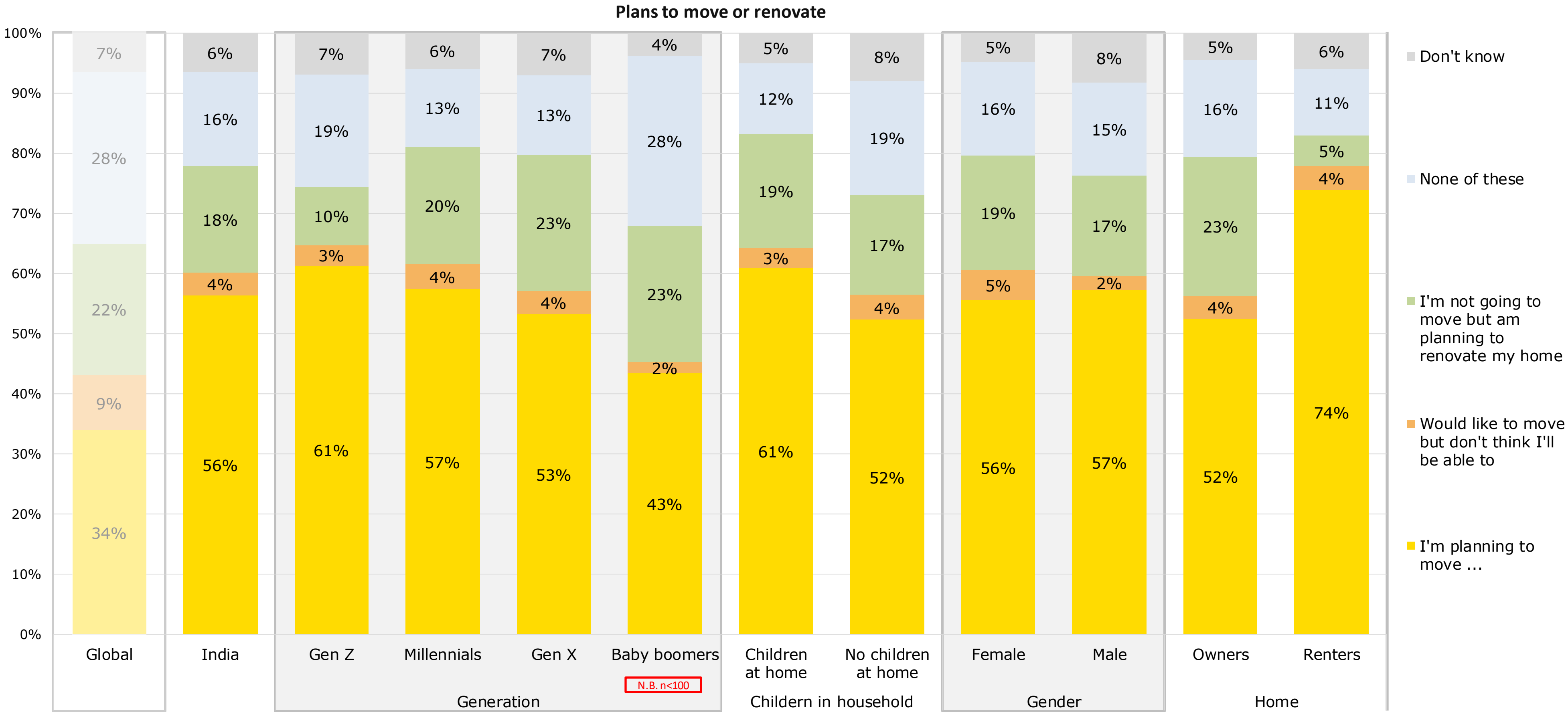
Among those planning to move, the main reasons are getting closer to something/someone (22%), followed by getting more space (20%). 18% want to get a more sustainable home.



Question: Are you planning to move to a new home or renovate your current home within the next 2 years?
Base: All (India 1 013), planning to move (India 571)

Plans to move or renovate

Question: Are you planning to move to a new home or renovate your current home within the next 2 years? Please select the answer that best describes your situation
Base: All (India 1 013)



06

Sleep

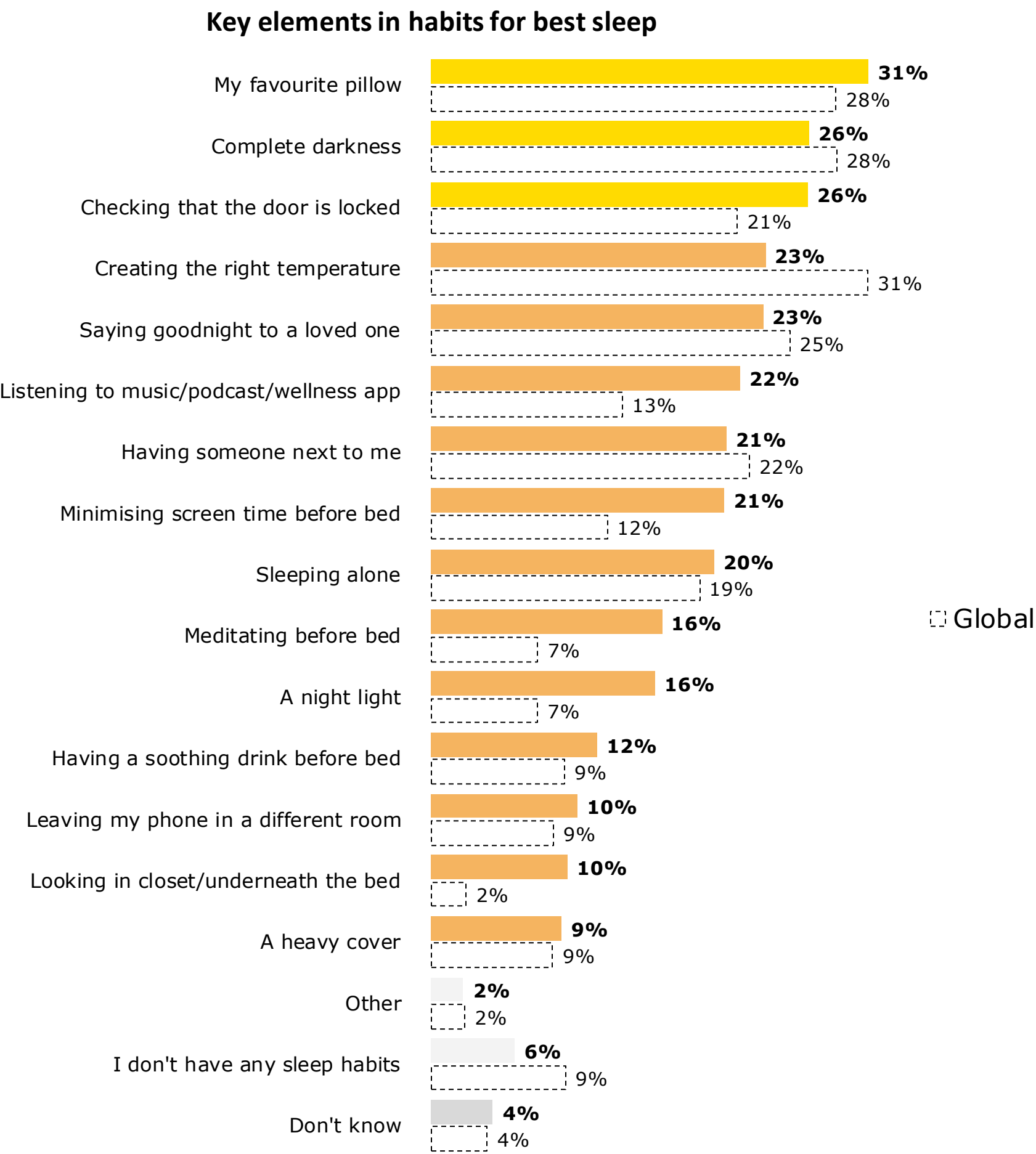
Their favourite pillow is a key element in habits for best sleep for 31% of Indians

It is somewhat more important to women than to men (33%, 28%).

Complete darkness is in second place with 26% overall, and its importance is relatively similar across groups.

Night lights and heavy covers are mentioned by 16% and 9% respectively. Generation X is the least likely to mention each of these.

Compared to the global average, Indians are more likely to listen to music/podcasts/wellness apps, minimise screen time before bed, meditate before bed, and to look in their closet/underneath the bed, as well as to use night lights.

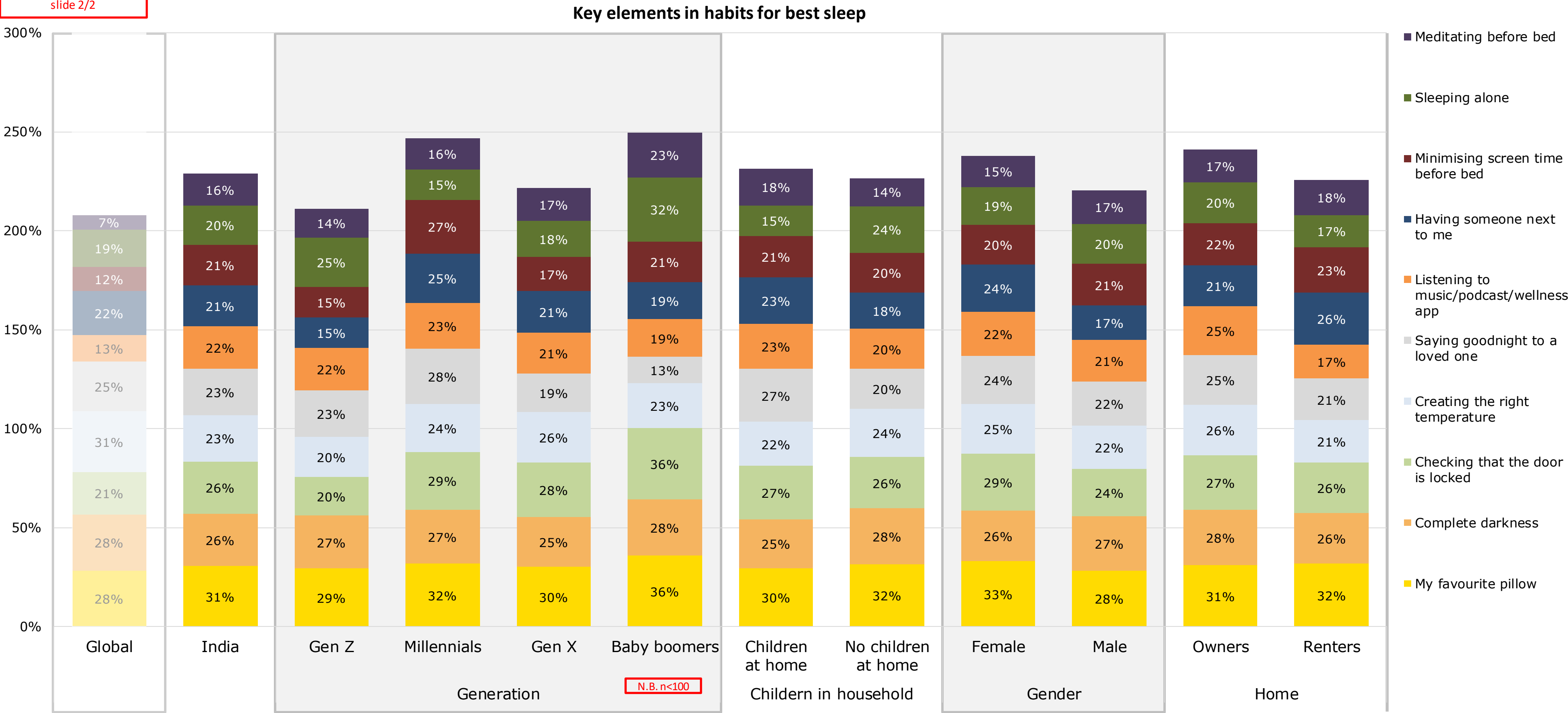


Question: What are key elements in your everyday sleep habits that help you get the best possible sleep? You can select up to 5 answers
Base: All (India 1 013, Global 37 428)

Key elements in habits for best sleep (1/2 – top 10 choices)

Question: What are key elements in your everyday sleep habits that help you get the best possible sleep? You can select up to 5 answers
Base: All (India 1 013, Global 37 428)

N.B. Different scale from slide 2/2

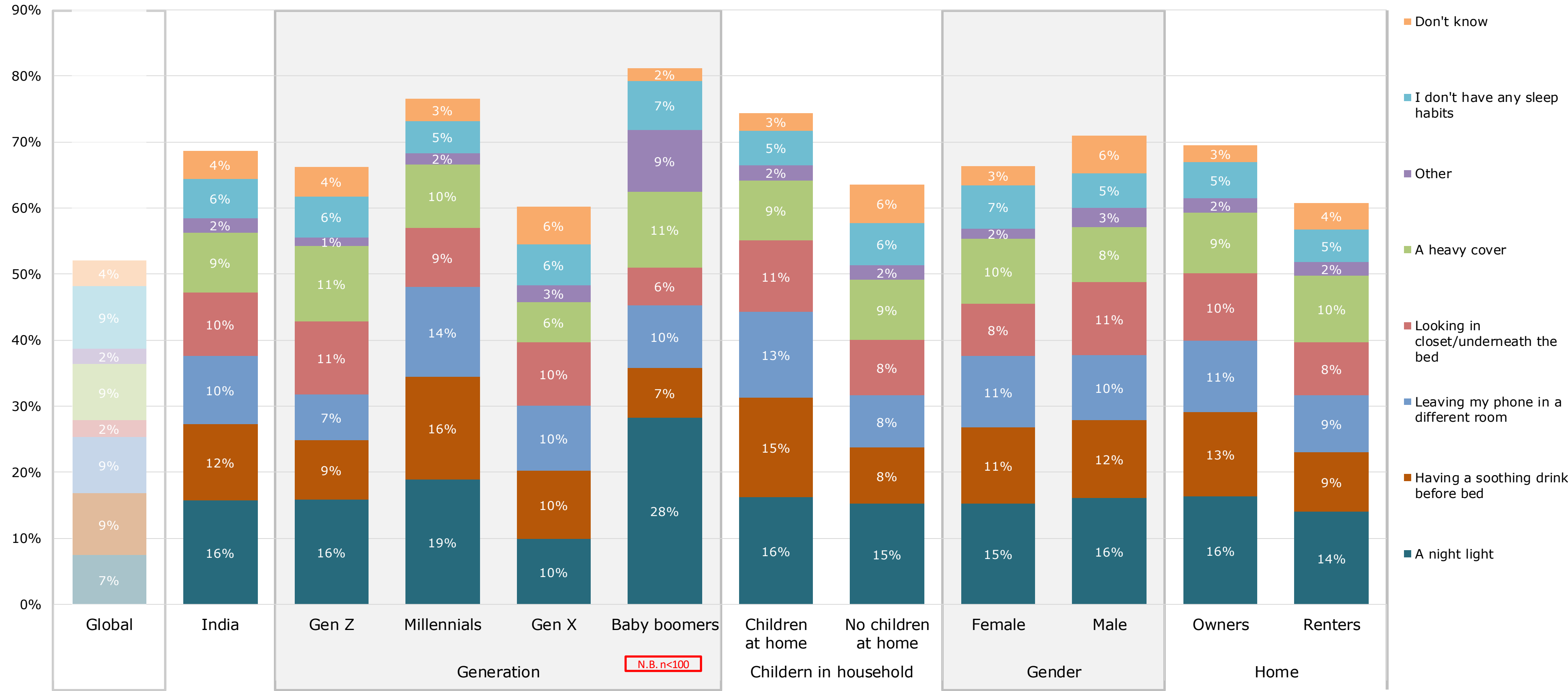


Key elements in habits for best sleep (2/2)

Question: What are key elements in your everyday sleep habits that help you get the best possible sleep? You can select up to 5 answers
Base: All (India 1 013, Global 37 428)

N.B. Different scale from slide 1/2

Key elements in habits for best sleep



07

What people do at home

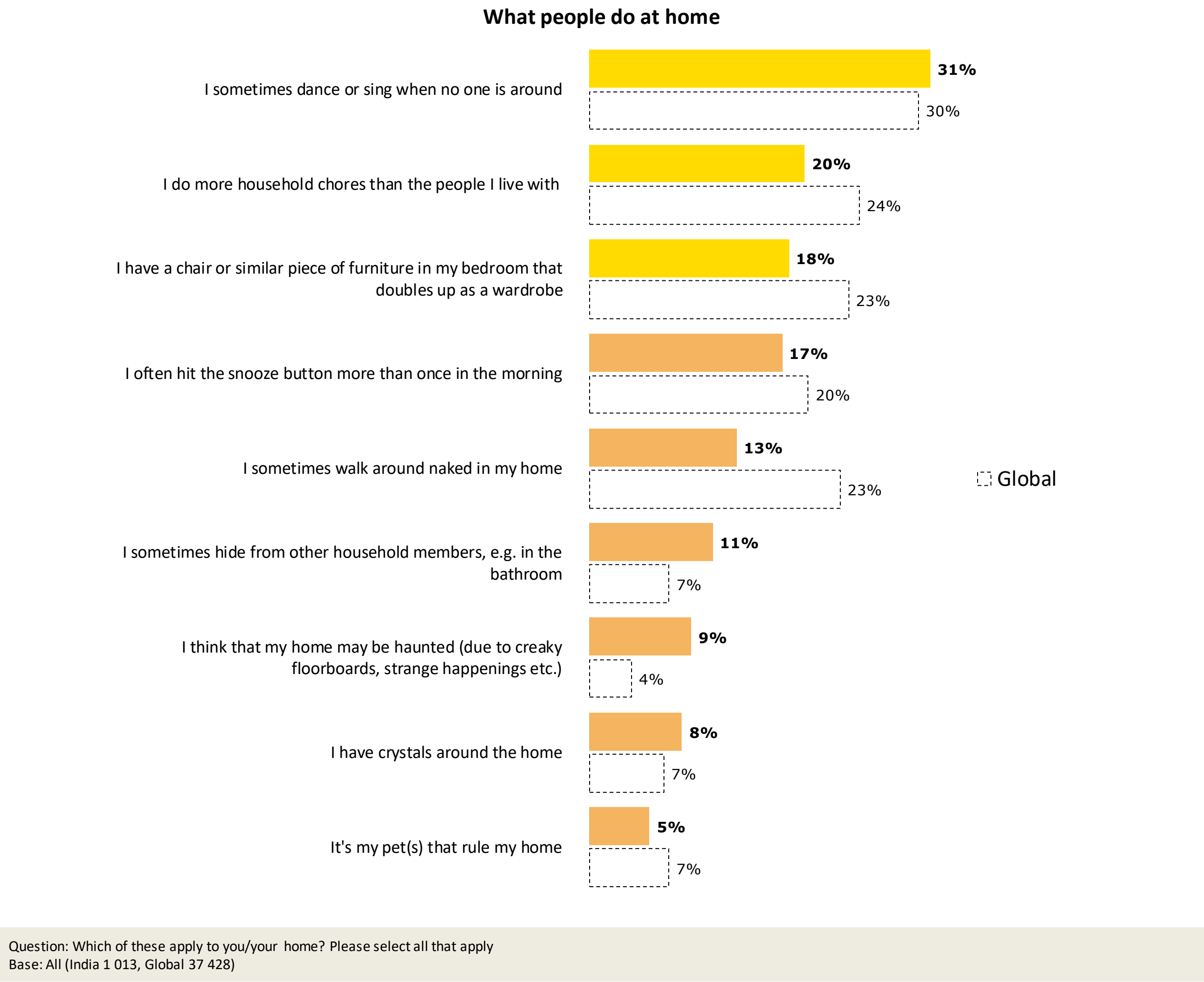
WHAT PEOPLE DO AT HOME

31% of Indians sometimes dance or sing when no one is around

The share doing this is higher among women than among men (35%, 27%).

There are three areas where Indians are ahead of the global average: Sometimes hiding from other household members, e.g. in the bathroom (11%, 7%), thinking their home may be haunted (9%, 4%), and having crystals around their home (8%, 7%).

5% of all Indians, and 32% of pet owners, say that it’s their pets who rule their homes.



08

Digging
deeper

24% of Indians consider themselves to be introvert

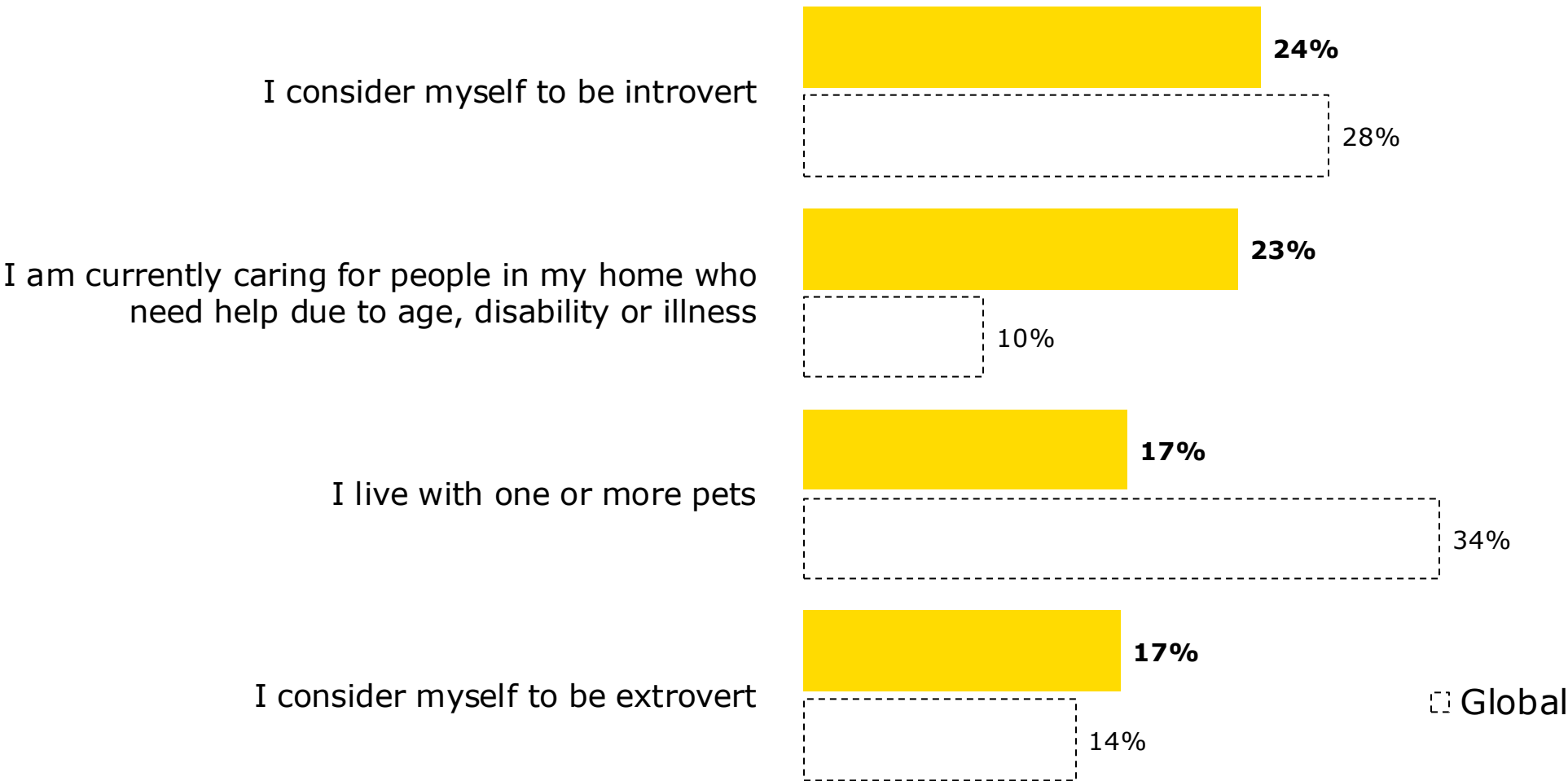
How might their responses to the survey differ from extroverts'? How do the answers from pet owners, or carers, stand out from the rest? And do you want to look into differences between generations or other groups which were not mentioned in this report?

If you want to dig deeper into the data from Life at Home research 2023, you are welcome to do so by ...

- Reading the global Life at Home report [Quantitative Research Results 2023](#)
- Using the interactive data analysis tool Crunch
- Contacting the Global Customer & Consumer Insight team:
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maria.jonsson13@ingka.ikea.com
Maria Jeansson
maria.jeansson@ingka.ikea.com

Please see further information about Crunch on the next page!

People’s descriptions of themselves



Crunch is a platform for survey data analysis

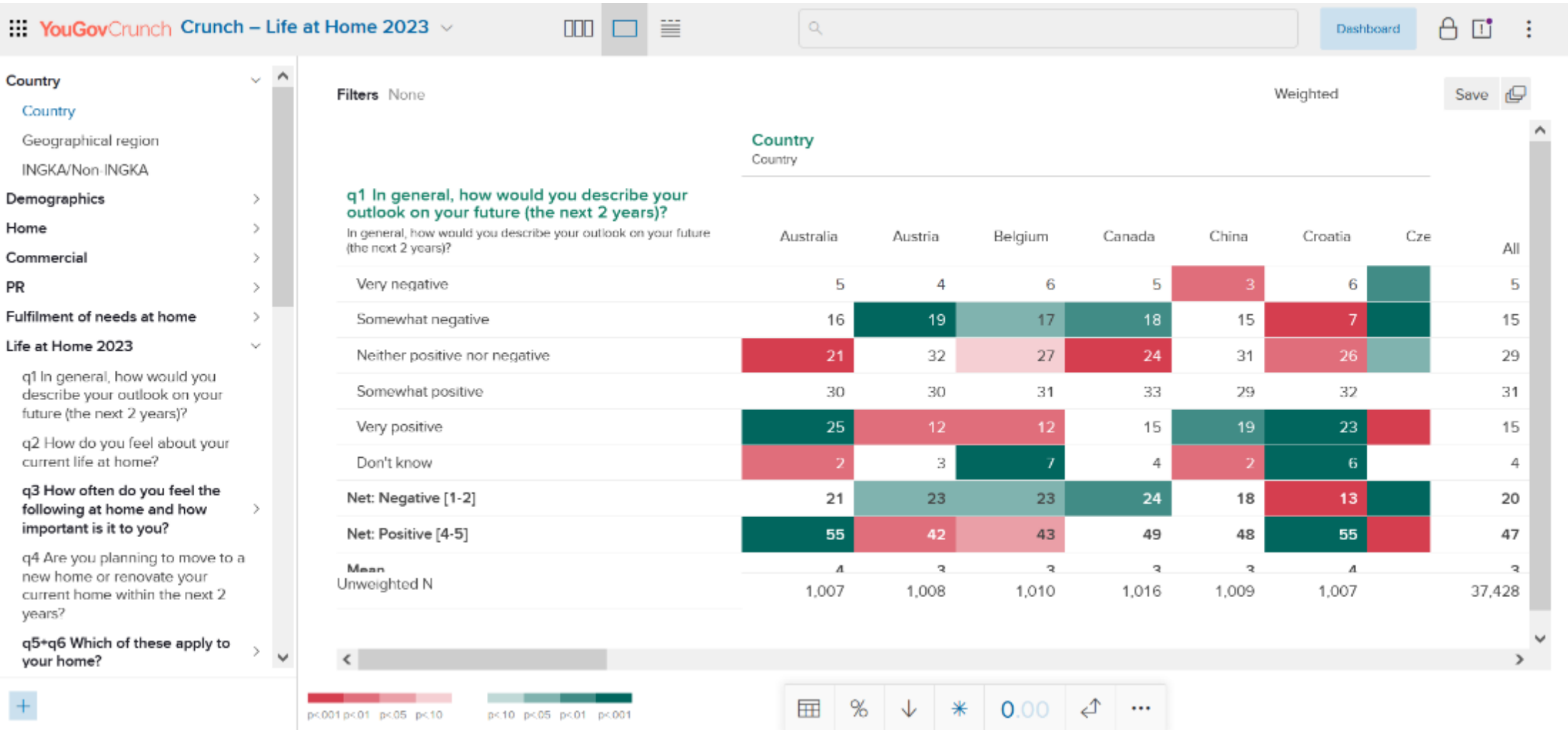
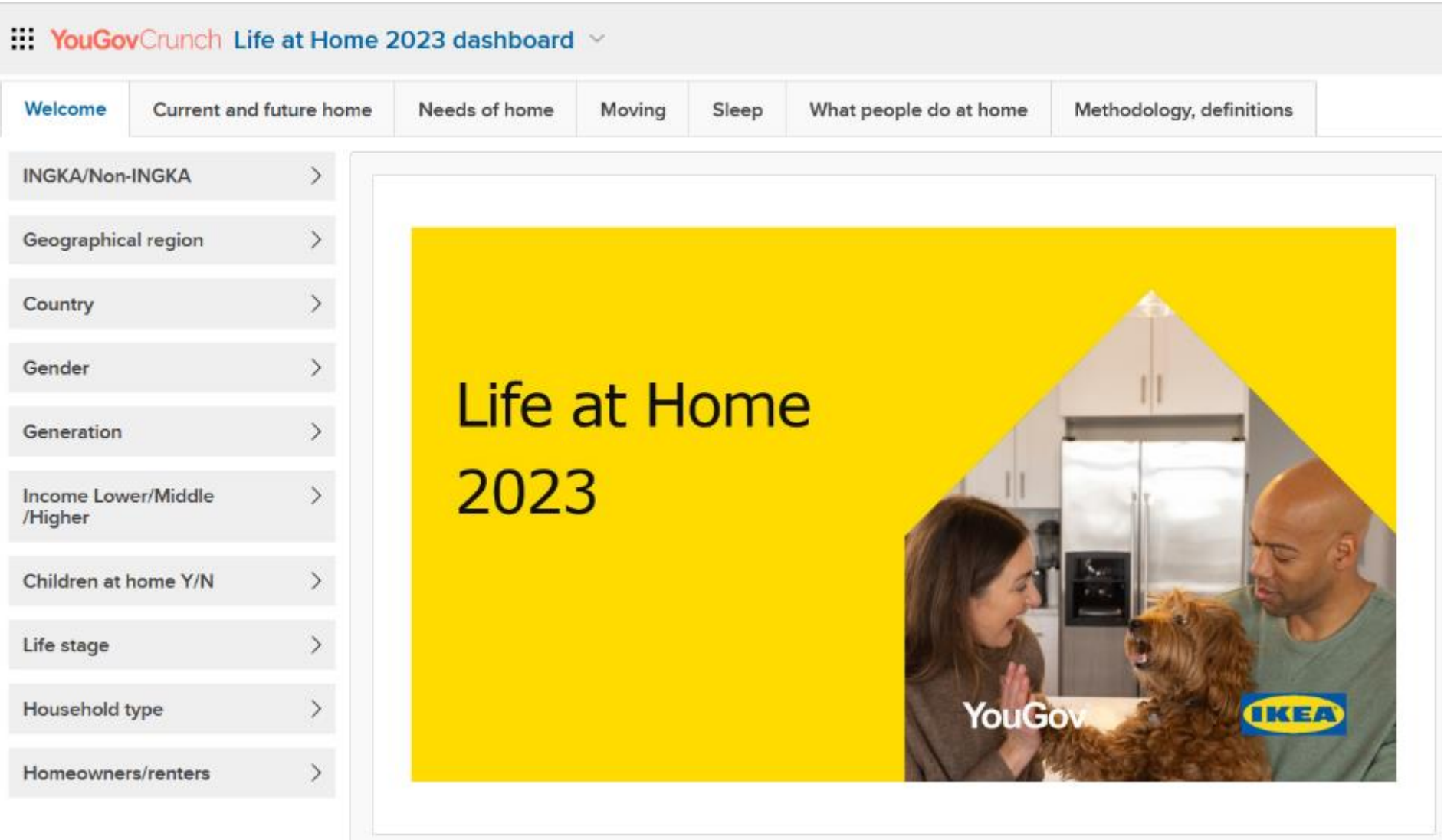
Look at the dashboards to get a simple overview, which you can filter by a number of background variables such as country, generation, home ownership etc.

Go into dataset mode to compare segments side by side, cross questions against each other, and even create your own variables

Link to dataset and dashboard in Crunch:
<https://yougov.crunch.io/dataset/b5fbce088aa24dac95d6d36b60c066a9>

For basic intructions, please visit:
<http://cdn.yougov.com/crunch/Introduction To Crunch.mp4>

For advanced instructions, please see:
<https://www.youtube.com/watch?v=a76Ljrb94sl>



Please visit:

lifeathome.ikea.com

Technical note

The quantitative research was carried out by YouGov on behalf of Ingka Holding B.V. – IKEA Group. YouGov is an international research and data analytics group. YouGov interviewed a total sample of 37 428 adults aged 18+ in the 38 countries Australia, Austria, Belgium, Canada, Chile, China, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, India, Ireland, Italy, Japan, Latvia, Lithuania, Malaysia, the Netherlands, New Zealand, Norway, the Philippines, Poland, Portugal, Romania, Serbia, Singapore, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, the United Kingdom, and the United States of America. The survey was conducted in May-June 2023, via online panels for each country. Quotas have been applied on gender, age and region, and data was weighted according to the dimensions of gender, age and region on the basis of an ideal weighting from statistics in each country, so that the results are representative of the population of that country.

Base
All adults = 37 428

Tack

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