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New Bonava study: Changing life choices are reshaping housing as the family norm is challenged

Fewer young people plan to have children, seniors do not see themselves moving to a new home, younger generations report the lowest sense of safety, and working from home has become normalised. Combined, these trends are changing how we look at the home and life in the surrounding area. The findings are based on Bonava's new housing survey, comprising 4,000 interviews conducted in Sweden, Finland, Germany, Estonia, Latvia and Lithuania – where Bonava operates. The survey also shows clear generational differences in our perspective on future housing.

"How do we create homes and neighbourhoods where people want to live when fewer young adults plan for children, seniors do not believe that living conditions will improve over time, and work life permanently moves into the home? These are questions that need to be addressed in urban development across our societies. Achieving this requires close collaboration between business, municipalities, policymakers and civil society", says Anna Wenner, SVP Brand and Culture at Bonava AB.

The survey, conducted by the insights agency VAKN, identifies trends that are shaping how people want to live today and in the future. The results are summarised in the [Happy Neighbourhood Report 2026](#). Here are some of the most important insights:

Fewer children challenge the nuclear family norm

Declining birth rates are well documented, but the new study shows how these demographic shifts affect demand for future homes and neighbourhoods. Young people's lifestyle choices are increasingly made outside the traditional nuclear family norm. On average, one in three young adults say they neither have nor plan to have children, with the differences between countries being significant. In Finland, the proportion is 47 per cent, compared with 30 per cent in Germany, 26 per cent in Sweden and 24 per cent in the Baltics. Despite these differences, the results point to common needs: homes and neighbourhoods that work for a wider range of lifestyles and cohabitation constellations, and that can be adapted across different stages of life. In this context, it is becoming increasingly important for policymakers to understand the underlying causes of this development and how this societal challenge can be addressed.

The senior paradox – low mobility despite the need for new housing options

45 per cent in the 65–74 age group, state that they are unlikely to ever move. Increasing mobility in this group is important to reduce the lock-in effects that have become a growing societal challenge in the housing market. Greater mobility would also make more single-family homes available that are in high demand among families with children.

To achieve this, more attractive housing options are needed for older people, a group that will increase in number in the coming years. Of those aged 65–74 who are considering moving, 34 per cent say they want a home that is easier to maintain. At the same time, interest in moving to newly built neighbourhoods is low (26 per cent), compared with 40 per cent among those aged 20–29.

The results also indicate that seniors have low expectations that their housing situation will improve in their next home. Previous analyses show that traditional, age-segregated housing solutions are rarely perceived as attractive alternatives. Instead, it appears that many seniors are looking for homes and neighbourhoods that feel safe and lively so that they can continue to live an active life.

The home as a workplace – a new normal

Another clear trend across all six countries is that working life has moved into the home for good. 41 per cent of respondents with jobs work remotely at least one day a week, and almost 27 per cent say they want a dedicated workspace at home.

The results point to a growing need for smart, space-efficient solutions, where the same area can serve multiple functions, without compromising comfort or affordability. Since additional square metres mean higher housing costs, planning flexible and multifunctional living spaces becomes increasingly important. Shared neighbourhood workspaces are another alternative, and the survey shows that 35 per cent of all respondents could consider sharing a co-working space with their neighbours.

With this, flexibility is becoming a central issue in the development of future homes, not only for young people or families with children, but across the entire life cycle. The ability to adjust floor plans, create workspaces, and adapt the home to new needs is becoming increasingly important as lifestyles change more rapidly than before. This means that decisions about housing design made today need to remain sustainable and adaptable for generations to come.

Safety – the strongest shared denominator

Despite differences between markets and generations, safety emerges as a common denominator in the results across all six countries. On average, 49 per cent prioritise a safe and pleasant area when choosing where they want to live, and 75 per cent state safety as crucial for wanting to spend time outdoors in their neighbourhood.

At the same time, the report highlights a clear generational gap. Among those aged 50–74, 79 per cent say they feel safe in their neighbourhood, compared with 63 per cent among respondents aged 20–29.

Safety has long been central in residential development. The survey shows that safety is an issue that affects the entire neighbourhood and the social context surrounding the home. Factors such as everyday presence, meeting places and the design of shared spaces play a significant role in the perception of safety. Addressing these challenges requires joint solutions involving multiple stakeholders, including future residents of the neighbourhood.

The survey raises a central question for housing and urban development:

How do we create neighbourhoods that feel safe, lively and inclusive – regardless of age or life situation?

Link to the report: <https://www.bonava.com/en/sustainability/our-purpose/happy-neighbourhood-report>

For further information, please contact:

Emilie Schelin

Group Head of Press and Public Affairs

emilie.schelin@bonava.com

Tel: +46 73 905 60 63

About the Happy Neighbourhood Report 2026

- The study is based on 4,000 respondents (men and women aged 20–74).
- Conducted in Sweden, Finland, Germany, Estonia, Latvia and Lithuania.
- Focus on housing needs from a life-cycle and generational perspective.

Why Bonava produce the Happy Neighbourhood Report

Bonava develops homes and neighbourhoods intended to last for generations. Achieving this requires a deep understanding of how people's needs, life situations and expectations change over time – and how these differ across the markets where Bonava operates.

The survey behind the Happy Neighbourhood Report 2026 is Bonava's way of contributing to a broader understanding of housing development in Sweden, Finland, Germany, Estonia, Latvia and Lithuania. By collecting and analysing perspectives from people of different ages, the report provides a shared knowledge base on what influences people's desires to live, stay and feel at home.

The insights from the report are used to:

- develop homes that can be adapted over time.
- create safe and inclusive neighbourhoods for different generations.
- better meet changing lifestyles, such as remote work and evolving family patterns.
- contribute to long-term sustainable housing development in collaboration with local community stakeholders.

Bonava is a leading residential developer in Europe with the purpose to create happy neighbourhoods for the many. With its 900 employees, Bonava develops residential housing in Germany, Sweden, Finland, Latvia, Estonia and Lithuania. To date, the company has built about 50,000 homes and reported net sales of approximately SEK 8 billion in 2025. Bonava's shares and green bond are listed on Nasdaq Stockholm.

For more information about us, visit: www.bonava.com
