

# Life in Communities Report

**Finding our happy place**

February 2024

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# What's happening in communities?



## A changing landscape

Communities and the needs of people within them have changed in recent years.

On one hand, we're living longer. For many people, poverty has decreased while quality of life has improved. On the other hand, we exist in unstable times, amidst environmental breakdown, and economic challenges whereby people's wallets are shrinking. And despite more people living in increasingly urbanised environments – many of us are experiencing loneliness and isolation.

## Our changing needs

To cope with these shifts, we're leaning on our communities to find stability, support and comfort. We're seeking friendly, lively and collective fun to cultivate optimism. What this looks like differs between regions – but engaging in hospitality and retail are broadly popular activities around the world.

People of all ages are looking for new and different ways to unwind, relax and connect with others outside the home. In the past, activities such as worship and dining out made people feel part of a community. Now, discovering niche activities and exercising together is just as important in creating those bonds.

We also want to balance liveliness with calmness. As we look to take refuge from the chaos beyond our control, we're joining book clubs, enjoying relaxation rooms, and seeking solace in nature. We're cocooning ourselves and finding our 'safe space' – but alongside others who share the same needs.

All this works to better balance our wellbeing. Many of us are putting greater emphasis on our mental and physical health, because we know it's only by looking after ourselves can we truly look after each other.



# The evolution of place



The changes in how we interact outside the home, and what we value in these spaces, means our meeting places must evolve accordingly.

Physical areas, whether indoors or outdoors, must work harder to give communities the support and nurture they need to thrive.

This report looks at what we’ve heard from more than 5,000 people across five countries (including Sweden, Poland, Spain, USA and China) and uses qualitative and quantitative research to delve into their experiences of community.

*Full methodology can be found in the [appendix](#).*



## What does Ingka Centres mean by communities?

Community is defined by the shared feeling of belonging and togetherness that being with a group of people can evoke.

Communities can range in size, from small groups of five people, to entire neighbourhoods. What’s more important than numbers is the strong shared identity, purpose and/or interests the community has.



# The faces of change



**Clara**  
*The family with kids*

|                       |  |
|-----------------------|--|
| Age                   | 34   |
| Location              | Outskirts of Barcelona                             |
| Household composition | Mario (partner) and Maya (daughter) and Luis (son) |
| Feels happiest when   | Being in nature                                    |
| Relaxes by            | Keeping in touch with friends and family online    |

Communities can be busy places. To help you better understand the research, here are three examples of individuals\* whose lifestyles our findings might impact.

Clara and her family lead an energetic, sometimes chaotic lifestyle – juggling school runs with after-school activities.

Together, they enjoy going out and shopping as a family, which can be made extra fun when it’s combined with activities such as going to the movies or grabbing a bite to eat. However, what Clara and her family really love is going to the park or the beach – especially when the children get to meet new kids to play with, and the adults meet other parents to chat to.

When the children have gone to bed, Clara enjoys connecting with others online. As a busy mother, it’s the easiest and cheapest way to keep in touch with friends and family. For Clara, the ideal spaces are ones where play is encouraged for kids and adults alike, and also have designated spaces to relax after all the activities, too.



\*Please note models have been used for illustrative purposes





Lian

The young urbanite

|                       |  |
|-----------------------|--|
| Age                   | 26   |
| Location              | Beijing  |
| Household composition | Solo   |
| Feels happiest when   | Having a good mental balance                                       |
| Relaxes by            | Exercising, whether that's at the gym, climbing centre or on a run |

Lian leads a busy life, trying to balance staying fit, connecting with friends, and having new experiences, all on top of doing well in her job to secure her next promotion. Work takes up a lot of Lian’s time, so she likes to mix up where she works: alternating between the office, her home, or a co-working space that feels really welcoming.

Lian finds exercise helps her to unwind. She also loves to go shopping and to meet up with friends at restaurants or bars after the working day. And when she’s not feeling up for in-person hangs, she’ll stay at home and connect with friends by playing video games instead.

It’s important for Lian to strike the right balance between self-development and spending time with others. Lian is always on the lookout for new things she can try out. If they’re accessible, inclusive and sustainable – she’s definitely there, in person or online.

\*Please note models have been used for illustrative purposes





Burt

The empty nester

|                       |   |
|-----------------------|---|
| Age                   | 66  |
| Location              | San Francisco Bay Area                                    |
| Household composition | Diane (wife)  |
| Feels happiest when   | Chatting to fellow regulars at his local cafe             |
| Relaxes by            | A walk or a bike ride, followed by a meal at a restaurant |

Burt recently retired. He’s enjoying his new lifestyle with more free time to spend with Diane and his three adult children when they come to visit. The family much prefers in-person visits, as video calls don’t feel nearly as special.

For Burt, most days start the same, with a visit to his local cafe. It has a great outdoor seating area and it isn’t too crowded or noisy. Burt tries to avoid busy places as he’s still worried about Covid-19, especially as Diane got really sick with it a couple years back.

Now that Burt and Diane have more time on their hands, they’re trying to spend as much time as possible outdoors in nature around the Bay Area. Physical and mental wellbeing is top of mind for Burt, so getting out and about is really important.



These three personas are very different. But they have lots of similarities, too. Read on to see how we can make communities work better for people around the world, and address the global challenges many communities face.

\*Please note models have been used for illustrative purposes



# It's better together

Many of us like to keep busy outside the home. But we find the activities we get up to don't always bring about a sense of community. We're in our own worlds, doing our own thing.

This is at odds with what a lot of us desire. We crave connection by doing new, niche and different activities which allow us to come together and be part of something collective. Yet many factors often stand in the way, whether that's the high costs of doing things, difficult logistics, or a general lack of time.



## What we get up to together

The top three activities people do with others outside of home are shopping, going to restaurants/bars/coffee shops and being in nature. More than **2 in 5** people go shopping or go to restaurants, bars, or coffee shops with other people on a monthly basis.

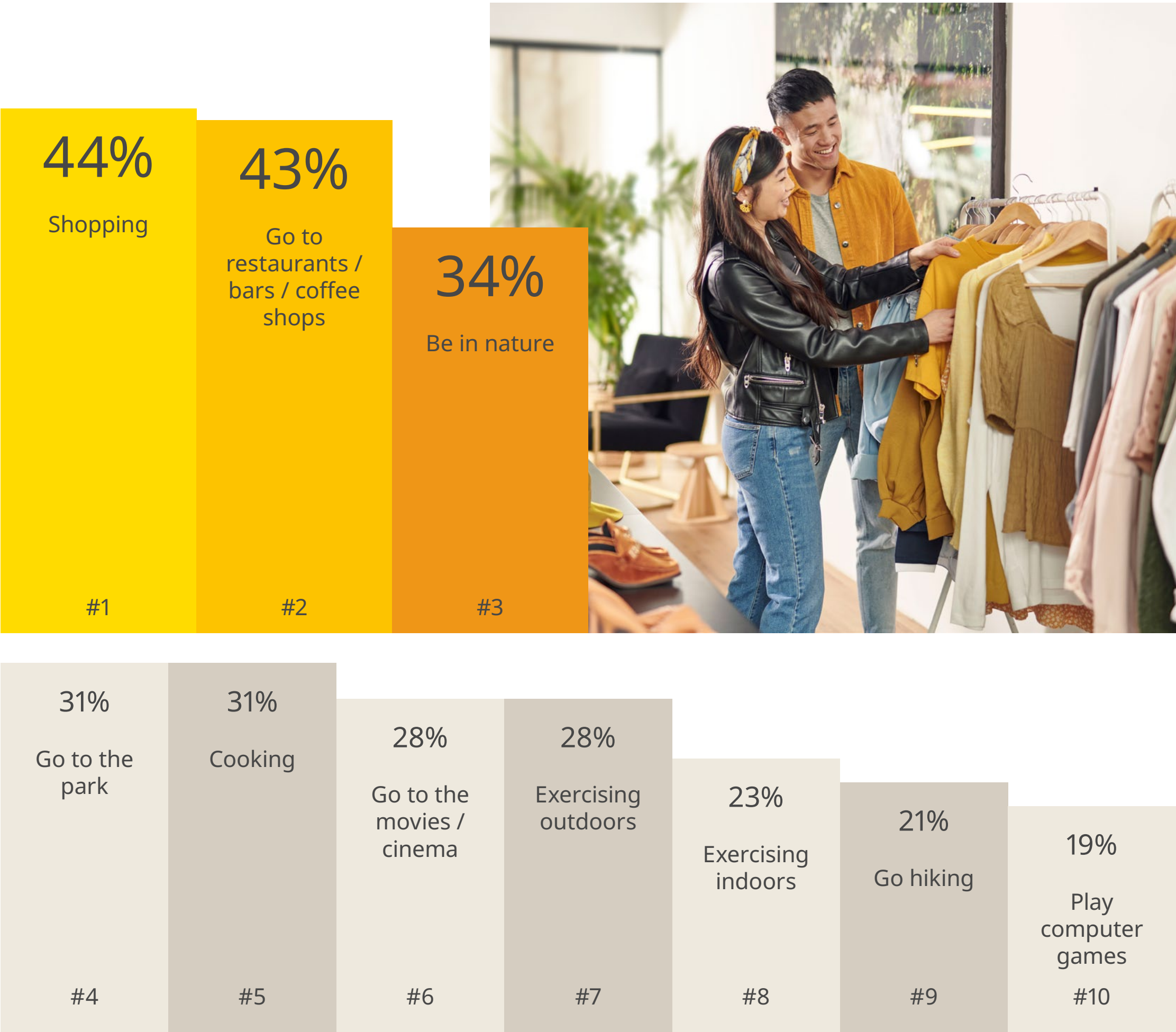
The chart on the right represents the total score across countries. However, there are key differences in specific markets. For example, China is the most active, while Sweden is the least active. In Poland, people are more likely to do outdoor activities, while people in Spain are more sociable. The USA averages evenly across all types of activities.

When comparing different activities people do, going to restaurants, bars or coffee shops is where we are most likely to feel part of a community.

Shopping with others is the most common activity, but it’s one where we feel least part of a community. And while charity work, volunteer work, politics and worship are more niche activities in terms of people taking part in them – these identity-based activities are more likely to make people feel part of a community.

2 in 3 people who are doing charity work, volunteer work, go to places of worship, or are doing political work, also see themselves as part of these communities.

### Top 10 activities done with other people outside the home





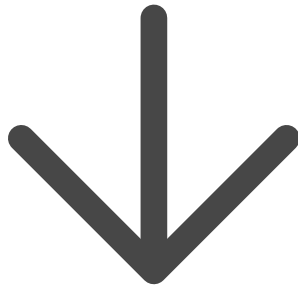


## Finding fun, wellbeing and deeper connection

Home is our basecamp.  
But it’s also good to venture beyond our four walls.

The top reason we participate in activities outside the home is because we enjoy it **(80%)**. However, being entertained **(76%)**, supporting our health and wellbeing **(74%)** and breaking away from our daily routines **(73%)** all scored highly, too.

But there’s more to our socialising than simply looking for fun. Doing activities with others helps us feel that we are among like-minded people and allows us to connect with others.



Nearly  
**8 in 10**

families with children like Clara’s think that visiting physical locations provide richer experiences.

However, a potential barrier to meeting in person is the perception that it is too expensive. This is especially true for families.



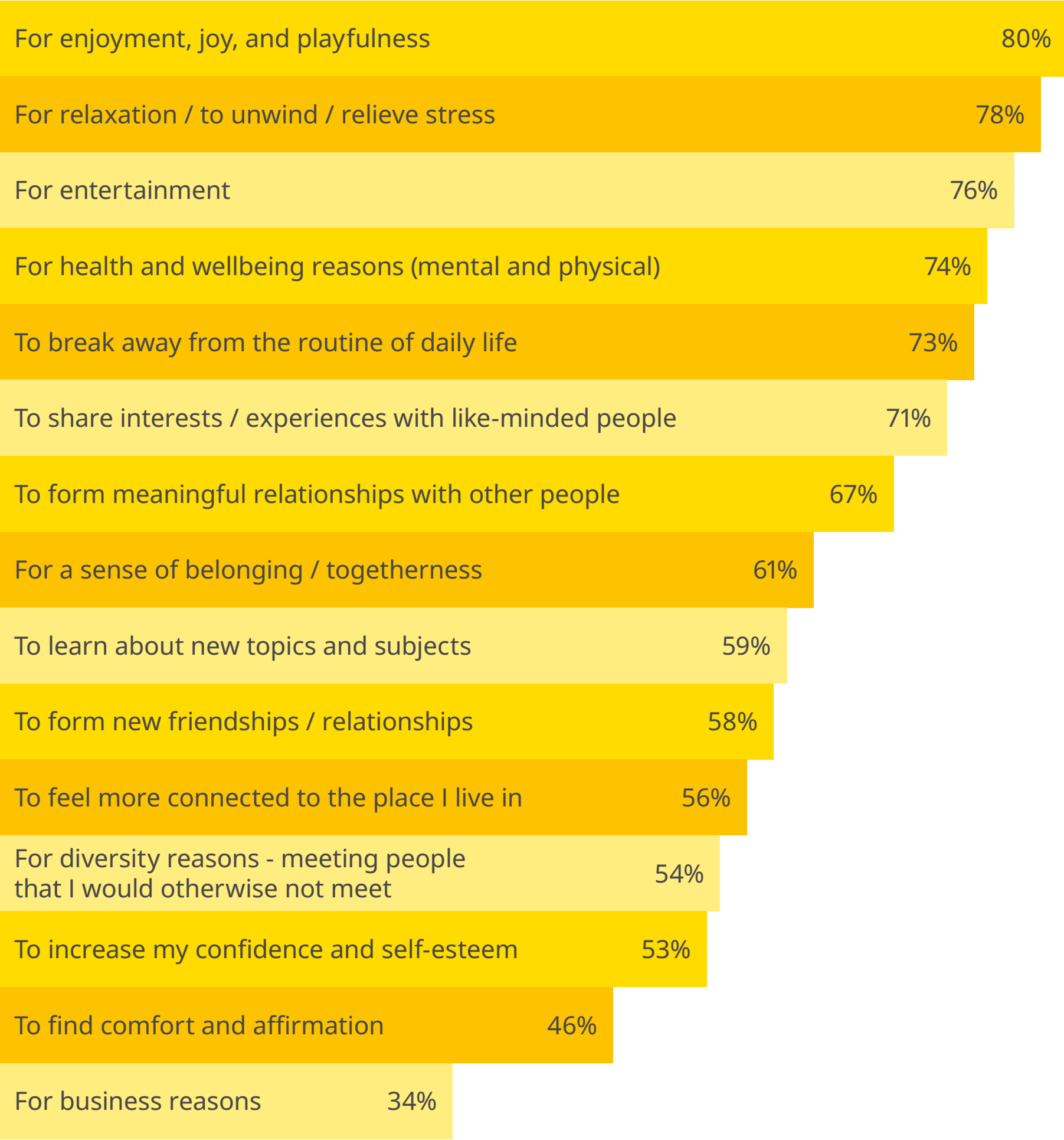
## Enjoy together

Enjoyment is the number one motivation across countries for connecting with others outside of the home.

European countries in the research follow a similar pattern, with a few notable exceptions. People in Sweden are more likely to participate for a sense of belonging or togetherness with others. Meanwhile, people in Spain are motivated by fun and enjoyment.

People in China told us they are motivated by a combination of reasons. However, motivators relating to their sense of identity (such as the feeling of being among like-minded people, or connection with others) are almost as important as those focused around fun.

### Motivation for doing activities with other people



## Esports: encouraging communities to play

In 2023, Ingka Centres partnered with the Swedish ESports Federation (SESF) to host a series of playful esports day events, which were spread across multiple Swedish cities.

Local communities were encouraged to come out into public places to meet, play and learn more about esports with others.



## The rise of the multifunctional space

Gone are the days when a meeting space could be designed for one purpose. Today, we expect meeting spaces to be able to cater to a variety of needs.

Almost **1 in 5 (17%)** of us say meeting spaces should be versatile and suitable for a variety of activities, while **29%** say that both indoor and outdoor spaces should be available.

And while being able to meet our emotional needs is the most important factor in making a meeting space successful, one functional need stood out: access to great food and drink options!

More than  
**1 in 3**   
say the ideal meeting place should provide access to great food and drink

However, we don't want to travel too far to access our meeting spaces. A quarter of us say the physical proximity of the meeting space to our home or workplace is highly important.





# A dedicated space for youth

In the Polish city of Lublin, people aged under 30 make up **35%** of the city's population.

As part of Lublin's European Youth Capital 2023 celebrations, SKENDE shopping centre created a dedicated space called Miejscówka, designed to cater to the needs of young people.

It included a workshop room, selfie box, gaming zone and a gallery – all with the aim of connecting young people from Poland, Ukraine and other nearby countries.



While it's good to have the freedom to do things alone, more and more of us are looking for opportunities to do things with others. After all, this is what energises us, gives us a feeling of belonging, and makes life fun. We just need fewer barriers to achieve it.



# Serenity now

Many of us love a lively, thriving community space. But at the same time, we also need peace and quiet. A place where we can escape to and create our own reality.

As uncertainty continues to define our times, we're seeking spaces which are calm, cosy and welcoming. Intimate spaces where we can enjoy a slower pace of life, whether that's playing a board game, working on a crafting project, or unwinding in nature. Anything that helps us reset and relax.

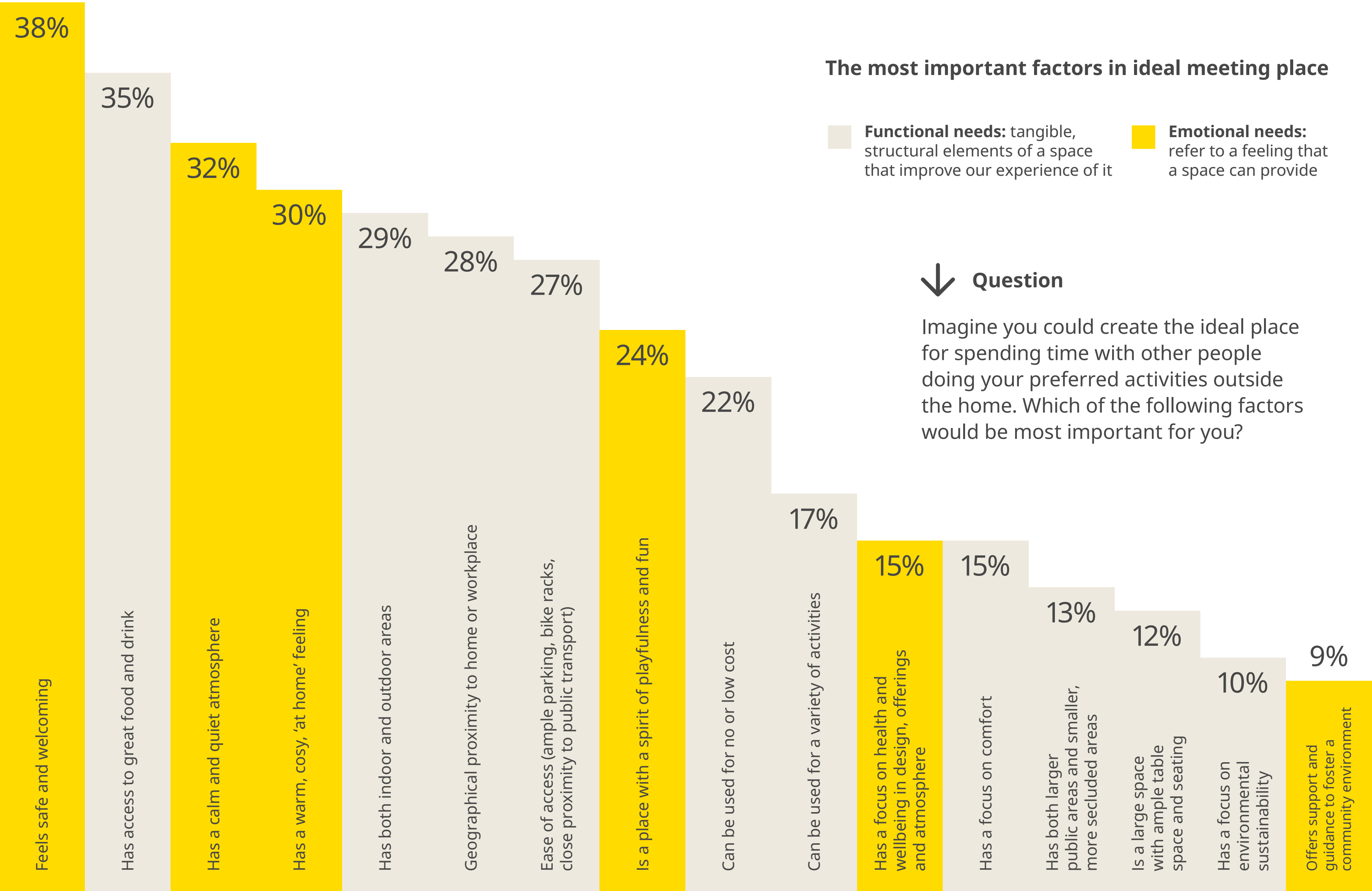
Yes, these 'cosy' pursuits are things we can do at home. But when we do these activities outside, with others, we find ourselves feeling safer, more connected, and more able to make sense of the world.



## Space for emotional needs

A meeting place should respond to a mixture of emotional and functional needs for the community that uses it. But we've found that the emotional component is the most important.

- The **experiential feel** of a space is far more important than its functional factors
- A new community space must feel **open and welcoming** to everyone
- New spaces should be suited to as **many activities** as possible
- **Proximity** to home and other frequently-visited places (like work) is the most important factor for a new space

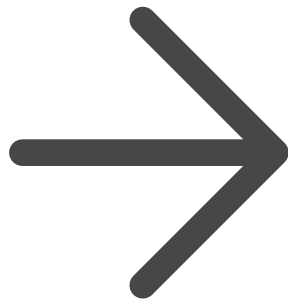




## A place to relax

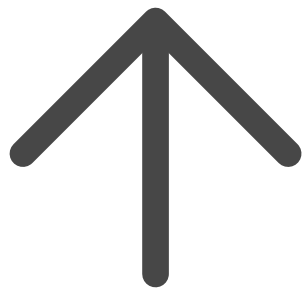
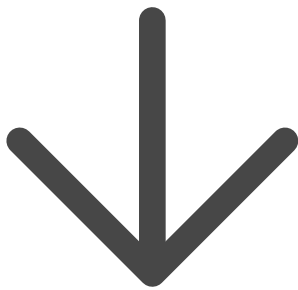
An ideal meeting place needs to make us feel safe and welcome. However, it also needs to offer us a place to chill. After all, if we can relax in a public space, then we can relax around one another. It’s how we can find a home away from home.

Relaxation spaces are ranked as the most important component by all countries surveyed. Poland, Spain and the USA rate them particularly highly.



When it comes to Empty Nesters like Burt, the ideal meeting place needs to have relaxation areas.

More than  
**1 in 3**  
people say the ideal meeting place should feel safe and welcoming



In Poland and Spain, a calm and quiet ‘at home’ feeling is more important to have in an ideal meeting place



## Relax into green

We are seeking more calm and welcoming environments both inside and outside of the home. Nature can be especially nourishing for many of us. Around **4 in 10** of us say that relaxation spaces, including indoor and outdoor green areas, are an important component to a dream meeting place.

Because, it turns out, not only can nature help bring a sense of calmness. It can also help create the space where we feel most part of a community.

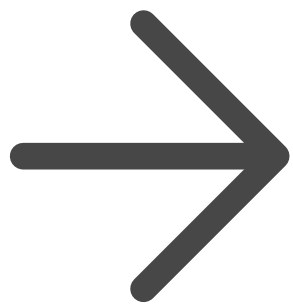


For Young Urbanites like Lian, exercising outdoors and being in nature are the activities where they feel the most part of a community.



## The ideal Gen Z space

When asked what were the most important features of a dream meeting place, Gen Z respondents said:



- |  |  |  |
|--|--|--|
| 28%<br>Educational and entertaining spaces | 23%<br>Flexible spaces for individual use          | Diverse food offerings <b>(18%)</b><br><br>sustainable solutions <b>(15%)</b>                      |
| 24%<br>Inclusive environment               | 25%<br>Accessible via public or personal transport | and access to co-working space for collaboration <b>(16%)</b> also featured as key considerations. |

## Warsaw’s not-so-secret garden

In 2020, Wola Park introduced the Everyday Garden to Warsaw’s Ulrich Park. Here, everyone is welcomed to help cultivate fruits, herbs and vegetables – and learn how to live a healthier and more sustainable life.







## Rise of the third place

It’s a busy, chaotic world. According to a study from Future Forum, **42%** of the global workforce are feeling burnt out – an all time high. As a result, finding places to meet which are calming and cosy can be exactly what many of us need. Such areas – known as ‘third places’ – which exist outside home and workspace, will need to work harder than ever before.

How places can achieve cosiness:

- Curved walls and minimal interiors
- Organic textures and soft colours
- Abundance of greenery
- Tech centred around sleep and meditation



We all need serenity in our lives. And nature can be the perfect way to create such balance. This is especially important in cities, where many people live in small apartments, with limited access to open, green space.

Because it doesn’t matter if we’re with others, or alone, when we find ourselves at peace with nature.

The fact we feel tranquil and calm means we have greater mental space to feel more connected with others in our communities.



# Finding better balance

Communities have a big impact on our mental and physical health. They can offer us support, connection and guidance. All of which helps to build our personal resilience. Without community, many of us can end up feeling isolated and lonely.

Yet this relationship flows both ways. While communities support us, we also help strengthen communities. Shopping locally, volunteering and engaging in local issues are just some activities many of us get up to which help build these community bonds. But we can only do this if our wellbeing permits us to.

This means we all have a symbiotic relationship with our communities. Community spaces have a duty to help people improve their wellbeing, both mental and physical. While at the same time, we all need to look after health, both inside and outside the home, if we're to keep our communities flourishing.



## Blending the digital and physical

It's not just the physical space we need to consider. There's also online communities and meeting spaces, too. Just over a quarter of us **(26%)** prefer to connect online, and about three quarters prefer to meet in person.

Yet we can't just exist online or in the physical world. In this modern era, we need both.

With many of us having an increasingly online life, a lack of touch and human interaction will lead the way for more multi-sensory and tactile experiences. A global study by Ericsson found that by 2030, most consumers will expect our sense of smell to play a key role in how we experience the internet.



Meeting places will need to appeal to all the senses if they're to thrive.

'XR' is the umbrella term for the three realities: augmented, virtual and mixed. It's expected these digital realities, alongside networks such as 6G, will work together to unlock proprioception – known as the hidden sixth sense – which helps us perceive movement, action, and location. Digital communities of the future will feel grounded in the physical space.



Such immersive and experiential environments hint towards an exciting future. But meeting places need to be welcoming for everyone. This means making sure such spaces remain affordable and accessible, as well as inclusive and adaptive, for the communities they serve.



# Gen Z and the allure of IRL

Despite having grown up with social media, Gen Z are more likely to have a longing to meet up with people face to face with **66%** citing this as their preference.

That's not to say they're not online. Like every generation, this group's behaviour is shaped by how they grew up. Gen Z are more likely to have joined more online communities and played more online games in the past years.

Yet surprisingly, they're more likely to have joined more in-person activities, too. It makes sense then that Gen Z expect more public places to meet up, as they look to balance their online and offline lives.

**66%** of Gen Z prefer connecting with friends IRL, rather than meeting up and socialising online. Regardless of the digital savviness, they believe time spent together in person can help build trust (**65%**) and lead to more quality time (**66%**).





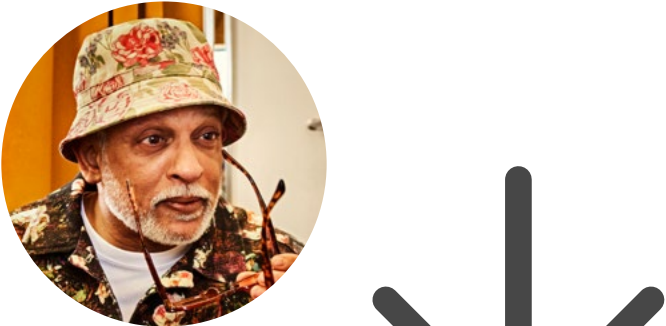
## Investing in ourselves

Over a third of us say our personal wellbeing has become more important over the last few years.

We're also concerned with being able to spend time outdoors, a challenge that is particularly important in Poland (**32%** agree) and China (**40%** agree).

While this may reflect the new reality many of us are experiencing in the wake of Covid-19, it may also reflect economic changes, or a renewed focus on climate.

In terms of our mental wellbeing, there was a divide between those of us who now spend more time alone – particularly in Poland (**33%** agree) and the USA (**36%** agree) – and those of us who have a reinvigorated appetite to see others (especially in Spain and China).



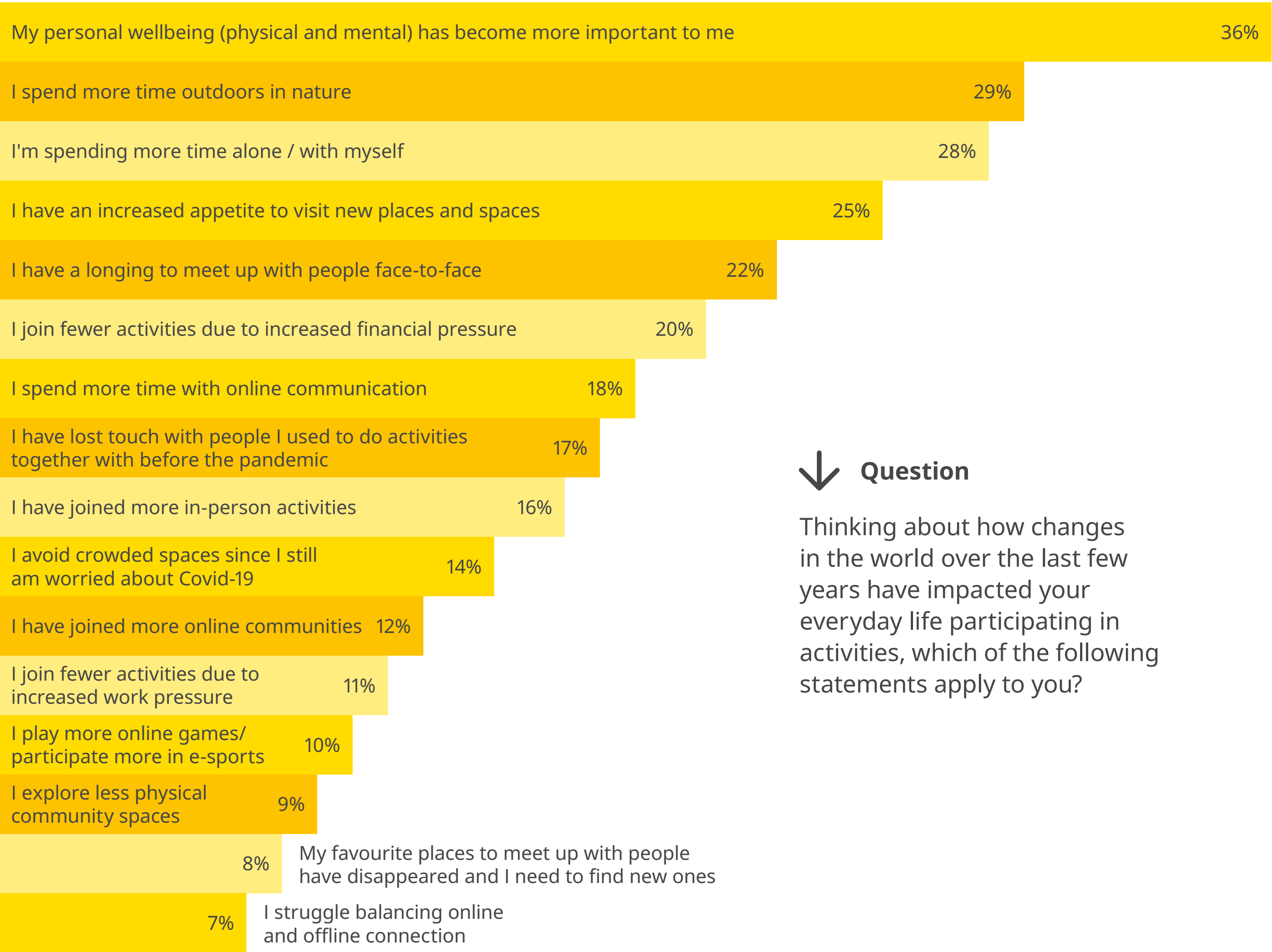
42%

of Empty Nesters, like Burt, say their personal wellbeing, both physical and mental, has become more important to them



More than  
1 in 3  
say own personal wellbeing has become more important in everyday life

## Changes in everyday life because of global changes in the last few years



### Question

Thinking about how changes in the world over the last few years have impacted your everyday life participating in activities, which of the following statements apply to you?



## The power of solitude or thriving together?

Physical and mental wellbeing is very important to us all, and has increased in importance over the last years. But we tend to fit into two camps: we either enjoy spending time alone for our wellbeing, or we're energised by spending time together.

More than **1 in 4** of us have been spending more time alone, and **1 in 5** have participated in fewer activities due to financial pressure. However, **1 in 4** of us have an increased appetite to visit new places and spaces, and about **1 in 5** have a longing to meet up with people face-to-face.



For the **28%** who say that they're 'spending more time alone / with myself', they're also more likely to state:

Physical and mental wellbeing has become more important

Have joined fewer activities because of financial pressure

Have lost touch with people I used to know before pandemic

Am more online than offline (when it comes to communities)

For the **25%** who say they 'have an increased appetite to visit new places and spaces', they're also more likely to state that:

Physical and mental wellbeing has become more important

Have joined more in-person activities

Have a longing to meet up with people face-to-face

Spending more time outdoors

Am less online (and struggle less between offline and online connections)



Whether we prefer to go at it alone, or hang out with others, our personal wellbeing remains a top priority. This means spaces need to be more curated and considered if they're to meet our needs. We'll continue to gravitate towards areas which are welcoming and relaxing, as well as those which are accessible and affordable.



# A glimpse into the future

The future of community spaces looks bright. Belonging and joy will be key themes as people continue to search for escapism.

Ingka Centres, as curators of meeting places in these communities, will continue to listen, learn and evolve meeting places to meet people’s changing needs.

This includes exploring beyond what’s typically offered in retail spaces to draw people in. In-person perks such as multisensory environments, classes in store spaces, and interactive experiences will be key in helping people find a sense of community and wellbeing.

## The five year view

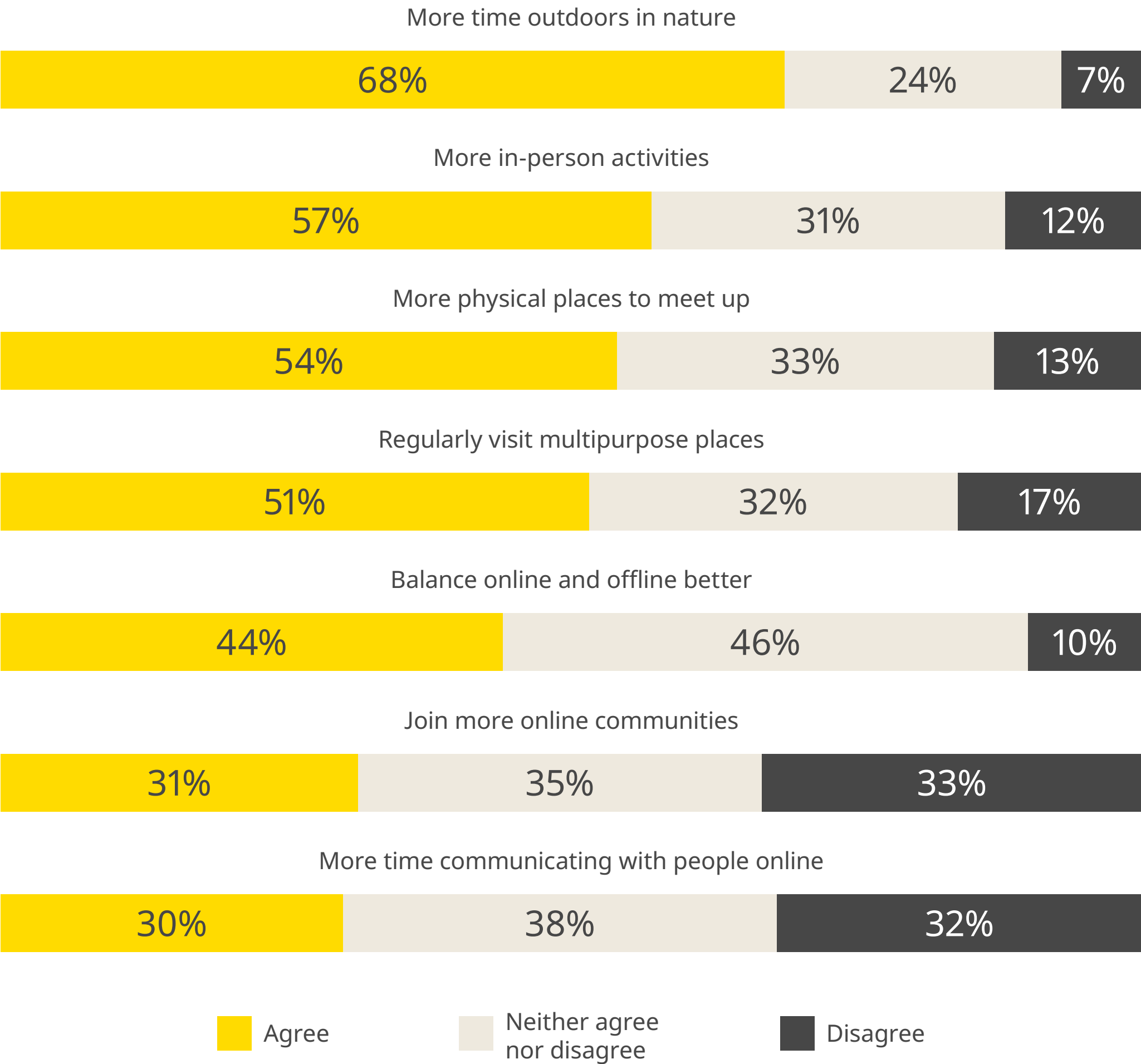
Meeting places are expected to evolve to meet people’s changing needs in the coming years ahead. Over half of us (57%) say we will meet up more in person, taking advantage of communal spaces where we can be physically together. Meanwhile, 68% predict that we’ll spend more time outdoors in nature.

And what about our lives online? Opinion is split, with 3 in 10 of us thinking that we will spend more time communicating on the internet.

### ↓ Question

Thinking about your life 5 years from now, how do you see yourself being part of communities – particularly in relation to participating in activities with others?

Participation in communities in the next five years





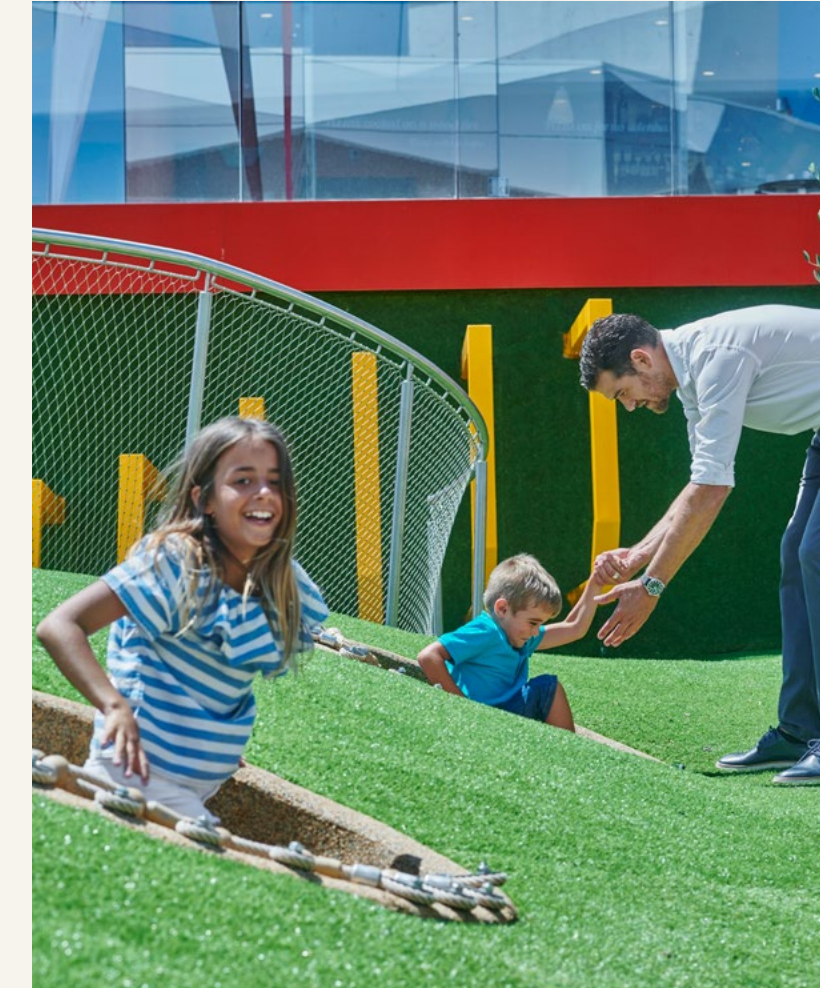
# The global future

→ In **Sweden**, there will be ongoing exploration to find balance between online and offline interactions



→ In **Poland**, most people will spend more time outdoors

→ In **Spain**, the outdoors will also have a much bigger place in community lives – and so will in-person activities



→ In the **USA**, there will be a better balance of online and offline community interactions

→ In **China**, there will be more of all community activities!





# The Ingka Centres perspective

It's clear people will always need physical spaces outside the home to come together, relax and enjoy each other's company. Retail spaces have the exciting potential to step up and meet this demand – becoming the meeting point of choice for those who are looking for convenience and accessibility as their worlds of work, leisure and wellbeing collide.

In doing so, shopping centres can become spaces where people thrive, while businesses flourish and give back to the community.

Yet there is still a big journey ahead. Around the world, people are looking for places that are both cosy and welcoming, while being fun and affordable. Play continues to be a universal language across generations, and across borders. While health and wellbeing remains critical for all.

A one size fits all approach won't cut it. At Ingka Centres, we're working to make sure meeting places offer people many opportunities to live healthier, happier and more sustainable lives. Our teams will continue to create spaces that are catered to local needs, and designed with community identity in mind. We will keep exploring and testing new and inspiring ways for communities to meet, shop and connect, all across the globe.

We're also on the lookout for partners to co-create experiences that people will love. We have a hyper-local and highly adaptive attitude, and are looking for others who have the same. After all, as the communities we've spoken to tell us, we need to bring even more flexibility, experimentation, and play into what we do.

## Ingka Centres concept spaces, designed for the future

**Circuit, Birsta City:** a curated community hub for visitors to learn how to repair, reuse, rent and recycle all kinds of products



**Saluhall, San Francisco:** a food hall that's focused on sustainability, plant-based foods, and Nordic cuisine

**Hej!Workshop, Stockholm:** a co-working space that's flexible and convenient, with more workspaces opening around the world





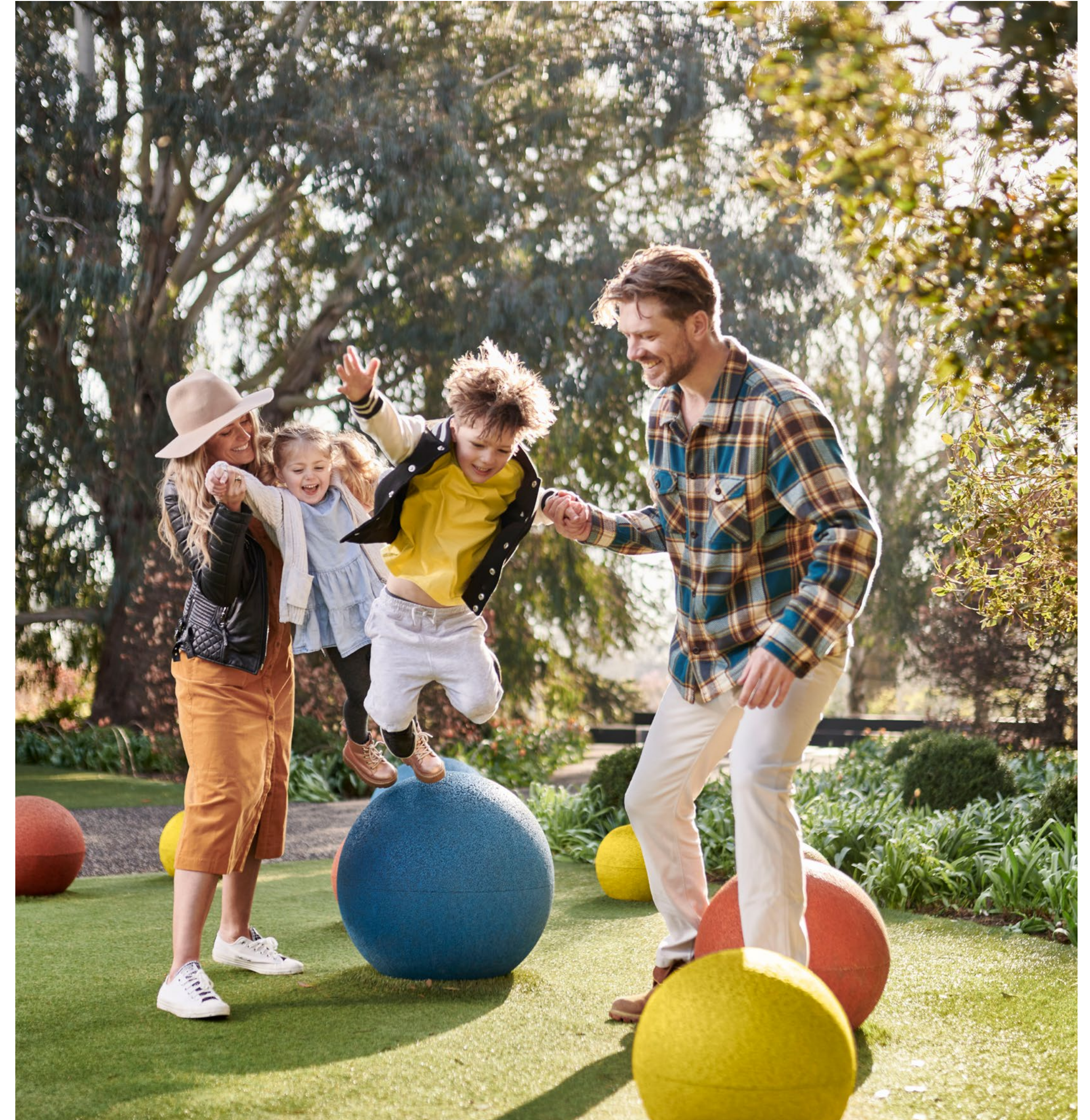
# Conclusion

The days of having a dedicated space for life, work and play are numbered. Instead, space has become more fluid, shared and multipurpose. As such, our meeting places need to reflect this new reality.

As communities, we share many things: values, bonds, connection. But we are all unique clusters of beings at the same time. As such, meeting places must be able to flex across our specific needs, whether that's our search for niche and exciting collective fun, or desire to be comfortable and cosy, together. They need to encourage that much-desired sense of community, while also allowing us to engage with the space in whatever way that meets our mood.

Localisation matters as well. Making sure these spaces reflect each community's unique culture, identity and traditions will help ensure that it remains at the heart of that community. The right choices in architecture, interior design, entertainment and food and beverage options will help.

The world will continue to turn. Communities will continue to change. Meeting places must adapt, evolve and grow with people's wants and needs if they're to remain relevant – whether that's emotional or functional desires, or online or offline lives. Or, most likely, a mixture of both and somewhere in between.





# Appendix

## Methodology

Life in Communities is a two-stage project conducted by YouGov on behalf of Ingka Centres to explore and better understand the communities around us.

In the first stage the following was explored through a qualitative research approach:

- Consumers’ perception, use and needs of communities
- Factors and needs making, forming and retaining communities
- Societal changes and the impact on communities
- How online and offline interaction happens – and those interactions pros and cons
- What would the ideal meeting space look like? In general, and related to shopping centres

Based on the qualitative findings a quantitative survey was conducted in the second stage to quantify and validate relevant results and size the potential for INGKA centres.

## Quantitative survey methodology

This report is based on the findings from the quantitative survey including more than 5,000 interviews across five countries

### Data collection

The surveys were conducted as online surveys (CAWI, Computer-assisted web interviewing) among YouGov panellists in Sweden, Poland, Spain and USA and among panellists in the YouGov Partner Panel in China.

Data was collected during the period 30 October – 19 November 2023. In all countries questionnaires in local languages were used.

### Target groups and sample sizes

Sweden, Poland and Spain: Men and women aged 18+, nationally representative for gender, age and region.

USA: Men and women aged 18+ in the San Francisco Bay Area.

China: Men and women aged 18+ in Wuxi and Beijing.

A total of 1,000 interviews each were conducted in Sweden, Poland, Spain and China, and 1007 interviews in the USA.

## Weighting of data

For Sweden, Poland and Spain data was weighted according to the dimensions of gender, age and region on the basis of an ideal weighting from the local country’s Statistical Institute, so that the results are representative of the population +18 years.

For the USA data was weighted according to the dimensions of gender, age, education and race and on the basis of an ideal weighting from the US Statistical Institute.

For China data was weighted according to the dimensions of gender and age on the basis of an ideal weighting from the Chinese Statistical Institute for the online population.

The USA sample is geographically restricted to the San Francisco Bay Area and China sample is restricted to Beijing and Wuxi. In both countries this corresponds to the catchment area of INGKA Centres and the results are thus not to be considered representative of the total population.

The sample from Wuxi/Beijing is focused on the online population – thus the age group from 18-54 is the biggest part of the sample.





Description of sample

| Region | Gender | Age groups    | Children in household   | Income levels   | Urbanisation   |
|--------|--------|---------------|---|---|----------------|
| China  | Female | Younger group | Children at home  | Lower   | City           |
| Poland | Male   | Ages 18-34    | At least one child 0-17 years old living in the household               | Less than 75% of the median   | Town or suburb |
| USA    |        |               |   |   | Rural area     |
| Spain  |        | Middle group  | No children at home   | Middle  |                |
| Sweden |        | Ages 35-54    | No children 0-17 years old living in the household                      | Between 75% and 200% of the median                                      |                |
|        |        | Older group   |   | High  |                |
|        |        | Ages 55+      | Respondents where information is not available is not included in split | Higher than 200% of the median  |                |
|        |        |               |   | Respondents where information is not available is not included in split |                |



Life in Communities Report

February 2024

Tack!

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