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Executive summary:

Housing demand in Vienna 2009

SORA study on housing demand in Vienna
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Housing Demand in Vienna

1. The study and its aim

On behalf of Municipal Department 50 of the Vienna city administration, which is responsible for studying the housing market, SORA investigated current housing demand. To this end, 2.007 interviews were conducted with persons over 18 years of age in July 2009.

This sample is representative of the Viennese population over age 18. Of the 2.007 individuals interviewed, 1.200 are younger than 35. This disproportional structure of the sample allows more precise analysis of younger people, who are more likely to be looking for flat. In order to ensure that statements are nonetheless still applicable to the Viennese population at large, this disproportionality has been corrected for statistically in order to make the figures representative.

This study's aim is to provide a comprehensive overview of current demand for housing and of the needs and wishes of people looking for a flat in Vienna.

2. How many people are planning to move?

Every fifth person interviewed is planning to move to another flat or is living in a household in which someone else is planning to move. A comparable figure from 2002[1] indicates that the housing demand has risen by 4 percentage points over the last seven years. Half of the people planning to move (11%) are actively looking for a new flat.

The propensity to move is far from being distributed evenly across the population. There are some groups that can be regarded as especially active on the housing market: young people in general are more likely to move (33%), especially the ones who are still living in the same household as a parent or parents (47%). The same can be said of people living in a household with several children (33%), jobless people (36%), single mothers and fathers (36%) and people on maternity leave (37%).

Considering activity on the housing market with regard to people's origins, one can see clearly that especially people from foreign countries (28%) or from the provinces (23%)

[1] Czasny, Karl et al.: Neueste Trends bei Wohnungsnachfrage – Interviews mit Wohnungsnachfragern in Wien; Stadt- und Regionalforschung GmbH – Wien, Juni 2002, page 33;

are more likely to move than people born in Vienna (16%). Furthermore, respectively 24% of the individuals living in flats owned by private landlords or in publicly housing are planning to move. This is also very likely for people living in apartment complexes with more than 30 flats (25%).
Looking at the demographic composition of the people actively looking for a flat, one can state that 57% of this group are women. One third is younger than 29 and 72% are less than 45 years old. Nearly half of them (44%) have less than 25m² of living space available.

3. Motives of people looking for a flat

One of the most important points when looking for a new flat is dissatisfaction with the number of rooms or overall size of the current one. Two thirds of people actively looking for a new flat want to live in a larger flat, one fifth (22%) is looking for a smaller one and only 16% want to have a new flat of comparable size. It has to be added that people looking for a smaller flat are not doing this primarily due to financial reasons. The most important factors are family related reasons—such as children moving out of their parents' household, or newly formed or ended relationships.

Overall one can speak of a trend towards more comfort and living space: on average, those interviewed want flats to be 13m² larger, leading to an average Viennese flat size of 95m². Concerning the size of flats sought after by people actively looking, it can be stated that half of the people (51%) are looking for an apartment sized between 60m² and 100m²; 22% are looking for a flat larger than 100m², and 26% for one smaller than 60m² (these are mostly students and retirees).

Two thirds of the people looking for a flat in public housing are currently living in one. 46% of the individuals in this group want to improve their housing situation, while 37% are looking for a bigger flat. 13% of all people looking for a flat in public housing are doing so for financial reasons. This matches the overall figure for people looking for a flat due to financial reasons—compared to a figure from 2002[2], this means that financial problems as a reason to look for another flat have risen by 5 percentage points. In general, this can be considered more a middle-class phenomenon of social decline than a specific

[2] Czasny, Karl et al.: Neueste Trends bei Wohnungsnachfrage – Interviews mit Wohnungsnachfragern in Wien; Stadt- und Regionalforschung GmbH – Wien, Juni 2002, page 41;

problem of low-income households. Nonetheless, single mothers and fathers (23%) - like singles in general (20%) - are prone to move for financial reasons.

4. Desires of people looking for a flat

In terms of the flat itself, daylight, a noise-free environment, a balcony or patio, cable TV and Internet access are highly sought after, whereas the ceiling height is less important. Likeable neighbors, private cellar compartments, telephone door entry systems and preferred appearance can be regarded as the most important attributes of an apartment complex.

The living area should be safe and clean and also offer easy access to public transportation. Altogether, people are more willing to accept drawbacks at the level of the apartment complex than in the context of their own flat or living area.

This is also reflected in terms of the flat's location and its proximity to public transportation: 82% of all people actively looking for a flat feel that it is favorable to live in a central location with access to the underground network. A vast majority of this group also finds the outer districts, with nearby recreation and access to public transport, to be highly attractive (74%). Nonetheless, there is still considerably lower demand on the outskirts of town and in the urban hinterlands.

5. Specific housing concerns of various social groups

Energy-saving housing can no longer be considered the special interest of an ecologically aware target group: 84% of people actively looking for a flat show interest in this construction method.

The majority (54%) of the people living in Vienna shows interest in intercultural housing projects. One third, nonetheless, tends to partially or fully reject this form of living. 3.5% actively formulate their rejection of intercultural neighborhoods (mostly elderly people), whereas the non-native Viennese population between 30 and 59 years of age shows increased interest. The trend is for people of younger generations to be more open to this form of housing than people over 60 years of age.

While retirees share their opinions on certain central aspects of housing (such as daylight and noise level) with the rest of the population, but they do express particular needs and

desires concerning the flat itself, the apartment complex and living area. These interests concern mainly the neighborhood, as well as a comfortable and barrier-free apartment complex and living area. This includes an increased interest in the availability of a concierge (66%), barrier-free apartment complexes (55%), and the close proximity of shopping facilities (70%) and of recreational areas (62%).
Furthermore they stress the importance of security - 80% describing security in general as being very important.

Therefore the interest in housing projects which cater to the specific needs of elderly people is extremely high among this target group - 96% of those individuals over age 60 with a monthly income of below 1.000 Euro express interest in this form of housing, with the figure for the corresponding group with an income over 1.000 Euro being 84%. Altogether, 75% of the Viennese population shows interest in this form of housing.
67% of the population also shows interest in multi-generational housing projects - the interest in this form of housing can be described as even across all age groups.

Young adults (ages 18–30) planning to move differ from the over group of persons wanting to change their housing situation in a few essential respects. In regard to their demographic composition, they are much more likely to be pursuing education, jobless or on maternity leave. With regard to finances, it can be stated that their personal monthly net income is far below average: 52% earn less than 1.000 Euro per month. Despite this fact, owner-occupied flats are the most sought after form of housing (31%), followed by flats owned by private landlords (28%).
The main motives for intending to move are the desire for a better overall housing situation (30%), the need for a larger flat (26%) or a change in one's familial situation (17%). With regard to the qualities of the new home, understood as both the apartment complex and the living area, young adults share most of the desires of the overall group of people planning to move: a low-noise environment, daylight, recreational areas and private cellar compartments. They differ in the high priority they give to the flat's location in terms of public transport access, centrality and its proximity to their place of work or learning. With regard to the flat itself, they consider the availability of cable TV and Internet access to be of the utmost importance.

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