Summary
ÖROK SERIES NO 215 – ÖROK-REGIONAL FORCAST 2022–2051

One of the tasks of the Austrian Conference on Spatial Planning (ÖROK) is to provide basic information for spatial and regional planning as well as various specialist policies. A key element of this is the regional population forecasts, which have shown a highly heterogeneous demographic development for years. Stronger population growth is essentially only to be expected in the large cities and their surrounding areas, as well as along the east-west axis along the main transport routes. Rural regions are experiencing more restrained growth, population declines or stagnation. These demographic developments are key drivers of household development in Austria.

The ÖROK Household Forecast 2022–2051 builds on the results of the ÖROK Population Forecast from 2021 and aims to forecast the regional household structure up to the year 2051. The focus is on the household formation process and its dynamics. It should be emphasized that it is not a housing or care needs forecast. Instead, it provides an orientation on how demographics and changing behavioral patterns will influence the household structure in the regions.

In the first phase of the project, a comprehensive qualitative and quantitative basis for the household forecast was created. As part of a hierarchical cluster analysis, the forecast regions were combined into groups that were as homogeneous as possible in order to make it easier to make assumptions as the project progressed. This typification made it possible to derive comparable patterns of behaviour and developments within the regions. In addition, the basis for the main variant of the forecast, a trend variant, was developed in this phase. Although the development of the number and structure of households is largely dependent on population development, factors such as increasing life expectancy, improved quality of life in old age and the trend towards individualization also influence household size. It was important to take various of these influencing factors into account in order to make the forecast as comprehensive and realistic as possible.

In the second phase, the forecast for the regional household structure was calculated. A bottom-up approach was chosen here, starting at the level of the 122 forecast regions according to age, gender, origin and household size and finally aggregating the values for the whole of Austria. The driving force behind all forecasts is demographic development, i.e. on the one hand the regional population development itself, but also the population structure in the respective regions (in terms of age, origin and gender). The current ÖROK Population Forecast 2021 was used for the federal state total and the marginal total at regional level.

In the main variant of the forecast, additional assumptions about future trends in household formation are taken into account in addition to demographic developments. For comparison, the results of a status quo projection are available, which is based purely on the demographic development based on the population forecast.

The results show a continuous increase in private households in Austria up to 2051. An increase of 11.9 % to 4,508,822 households is expected. The number of one-person households will increase the most, followed by two- and three-person households. Larger households will decrease in number.

According to the main variant, the average household size will fall from 2.20 (2022) to 2.09 (2051) people, influenced by social trends and demographic changes.

Similar developments can be observed in the federal states, although the regional differences are quite significant. For example, with the exception of Vienna, the average household size is falling in all federal states over the entire forecast period. In Vienna, however, it remains more or less constant. This forecast not only provides important insights for spatial and regional planning in Austria, but also underlines the importance of trends for well-founded assumptions for a household forecast.