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Meeting housing demands, needs or desires? Conceptual considerations for designing housing policies

Abstract

The central element of a housing market crisis is the unmet housing demand of the population, especially for the socio-economically disadvantaged. In the Austrian province of Tyrol, unmet housing demand has long been a social and political concern particularly in relation to housing affordability. Despite the ongoing construction and completion of housing units, many people find it difficult to find adequate housing. As part of a study to assess future housing in Tyrol, we took a closer look at the prevailing understanding of what is understood as housing demand and how this understanding can be distinguished from housing needs and housing aspirations. The article is based on the results of a goal-setting workshop with public policy stakeholders. By reflecting on the results, the paper sheds light on how unmet housing needs may represent not only a mismatch between supply and demand in the housing market, but also a mismatch between past, present and future aspirations and realities. The findings show that the question of what housing demand should be met by public policy, and whether this demand represents a need or an aspiration, is central to public housing policy and requires further consideration. The findings help to reflect on common theoretical and empirical conceptualisations of housing demand, need and aspiration, and how they can be assessed and identified in practice.

Keywords: housing needs, Tyrol, single-family housing, housing aspirations, housing demand

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1. Introduction

In many countries around the world, we can observe today how the need for housing, and in particular affordable, safe and adequate housing, is not being met. This is largely due to the fact that housing has become increasingly unaffordable, often as a result of economic and political influences (Gallent, 2019; Aalbers, 2016). These include processes of financialisation and increased liberalisation of housing markets, which are key aspects of today's housing crises, mostly due to challenges of affordability. As a result, people are forced to live in inadequate or precarious housing and, in some cases, face the stark reality of homelessness. Another aspect of the evolving housing crisis is the inability to realise specific housing aspirations, such as home ownership: in many countries or regions this has become

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more difficult today as land prices have risen and as land has become increasingly unavailable (also due to regulations to curb land consumption) (for Austria see e.g. Mundt et al., 2024).

In the Austrian federal state of Tyrol, housing affordability represents a main challenge for the society. In most of the municipalities and regions, land and housing prices have been rising constantly over the last decades. On the one hand, this is due to the limited amount of available building land, as Tyrol is situated in an Alpine region with a topography that offers few places suitable for actual building, including areas exposed to natural hazards and risks. On the other hand, the main economic base of the federal state is the tourism industry, with a high demand for land (for the construction of hotels and accommodation) and also for properties as second homes and investment opportunities. Today, Tyrol is one of the regions in Austria with the highest prices for housing and building land (Statistik Austria, 2024), which poses a major challenge for the population to find affordable housing. The housing (affordability) crisis is thereby equally discussed in the urban municipalities within the administrative boundaries of Tyrol (where we find university cities with a large number of national and international students), as well as in the rural municipalities, where tourism is often of high importance and therefore the demand for building land is high, also for second homes and multi-locals, as well as for tourism workers.

The diversity of people who have a housing need or demand housing (e.g. as an investment opportunity or as a second home) makes Tyrol an interesting case study to discuss the extent to which public policy is able to meet the needs and demands and which housing needs or demands should be prioritised. By reflecting on the statements of publicpolicy actors on how to cater the different housing demands existing within the Tyrolean society and the state of Tyrol, this paper further supports a conceptual clarification of what can be understood as housing needs, demands and aspirations. It also raises the question of whether a reflection on which housing demands, needs or aspirations should or can be met could be a prerequisite for improving public housing policy. The paper is structured as follows: After a theoretical introduction to what is considered as housing demands, needs and aspirations, we present definitions of what is legally considered as housing need in Austria and Tyrol. The conceptual part is followed by a presentation of the empirical results of the research project, which are further reflected and discussed.

2. Housing: What is needed, demanded or desired?

The search for housing is typically initiated when a need for a new residence arises. A need typically arises when changes occur. At the individual level, changes may serve as the basis for the formation of a family, a relocation, or other factors, such as the necessity for a distinct type of housing due to physical impairments. From a macro perspective, this shift in demand can be attributed to factors such

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as population growth, an ageing population, or migration. A housing need is then typically met through the housing market. From a neoclassic perspective, the housing market is conceptualised as a market characterised by the dynamics of supply and demand (Megbolugbe et al., 1991). The supply side comprises a range of actors, including private owners, commercial housing developers and public or publicly funded housing providers. The products produced are generally targeted at an equally diverse demand side, which is seeking housing opportunities to meet its housing needs. Furthermore, the demand side may be capable of satisfying its own housing needs, for instance, by constructing own dwellings on available land. Housing needs remain unmet when the demand side is unable to identify suitable opportunities within the supply side. A mismatch between housing supply and demand can be attributed to either an accumulated undersupply in the past, which is often referred to as a "backlog", or to unmet demand that arises from recent changes, such as population growth (Bramley, 2010). A persistent imbalance between supply and demand can lead to a housing market crisis.

Although a housing demand can be defined as a housing need, it is important to recognise that other factors contribute to the formation of a demand in the housing market. These include housing aspirations, including the pursuit of larger or more luxurious accommodation, as well as the acquisition of a second home. In addition, the potential for housing to be used as an investment opportunity also serves to stimulate demand within the housing market. The supply side is thus not only oriented towards meeting housing needs, but also towards responding to housing aspirations and housing as a commodity (Bernt, 2022). The fact that housing demand represents more than just housing needs (Cullingworth, 1960) highlights the necessity of housing policy. Private housing markets are unable to meet all housing needs due to a lack of focus on those who are actually in need versus other demands (Einem, 2016). This is often the case with the housing needs of particular groups, who are often vulnerable and inadequately recognised or served in this competitive market. Academic literature has highlighted the housing needs of disabled people (Jarvis, 2008), older people (Burby et al., 1990, Fox et al., 2017), young people (Kam et al., 2018, Tan, 2012), migrants or refugees (Aigner, 2019; Weidinger & Kordel 2023) and homeless people (Humphries & Canham, 2021).

In any case, it is difficult to derive aspects or definitions of what is understood as a housing need from the academic literature. This is because what can be understood as a housing need, depends on the norms and values of the society in question. Moreover, the lack of consensus on the conceptualisation of basic needs and the diversity of social structures, exemplified by the existence of different welfare states, make a general definition of housing need unfeasible. Ytrehus (2000) provides a summary and comparison of the different perspectives and conceptual approaches in order to clarify whether there are fundamental principles and guidelines that can be used to determine what is considered to be "necessary" housing. From a cultural relativist perspective, the concept of a "need" is subject to change according

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to temporal, geographical, topographical, climatic, social and contextual factors (ibid.). Nevertheless, there are universal objectives in terms of need satisfaction, such as maintaining physical and mental well-being and achieving or becoming autonomous (Doyal & Gough, 1991). Human needs are therefore considered to exist independently from personal wants. However, by comparing different perspectives on housing needs, Ytrehus suggests that the goals of need satisfaction also change according to the social system, which in turn gives rise to different housing needs, for example, between different age groups or across different spaces.

While housing needs represent a demand to ensure an autonomous and healthy life through adequate housing, housing aspirations represent what kind of housing is desired. Housing aspirations exist despite actual choices about how to achieve them (Preece et al., 2020). Aspirations therefore represent desires for what is to be achieved in the future, including hopes, but further ambitions that drive action in the present (Kintrea et al., 2015). While housing expectations are more oriented towards what is realistically achievable and are therefore more dynamic and subject to short-term change, housing aspirations are more enduring and influenced by the values of previous generations (Preece et al., 2020).

In the context of policy documents, housing need is often conceptualised as a macro-level need and defined as an undersupply of housing. A distinction is usually made between quantitative and qualitative aspects of housing need. Quantitative aspects then refer to the mismatch between supply and demand for housing and the ability to accommodate all those in need. If demand is high, prices may rise. Therefore, a mismatch between what is needed and what is available or accessible often depends on financial resources, meaning that what is needed cannot be afforded. Meeting housing needs is therefore linked to concepts such as social housing, subsidised housing and, most importantly, affordable housing (Aurand, 2010). To measure and compare housing affordability, the European Union has developed an indicator, the “housing cost overburden rate”. An overburden of housing costs is given, when total housing costs represent more than 40 % of disposable income (European Commission, 2024). his makes it possible to understand how housing affordability varies across different areas.

There are also qualitative aspects, e.g. that the housing that is actually available is not habitable or adequate for specific needs. Some general guidance on the qualitative aspect of housing needs is provided by the United Nations definition of adequate housing (UNHCR, 2007). Although inherently vague, this definition can serve as a helpful guide. It identifies four dimensions: security of tenure, affordability, accessibility and habitability. Security of tenure can be achieved when a dwelling is safe from natural hazards and the occupants are safe from any form of eviction. This includes different types of tenure, whether owner-occupation or long-term rental. Housing is considered affordable when the cost of housing does not interfere with other human rights, and accessibility includes access to

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public services such as water, electricity, heating and sanitation. Finally, housing is considered habitable if it is of sufficient size, has durable structures and takes into account the special needs of socially or culturally disadvantaged groups. The quality aspect can therefore have different characteristics: it can refer to overcrowding, but also to housing facilities, including the number of rooms, lack of availability of infrastructure (water, electricity, heating, sanitation, accessibility, etc.), condition, safety, etc. Of course, what is considered adequate quality depends on various (often normative) factors and varies over time and space (Obermayr, 2023). What is considered safe and decent housing also varies. There are differences in welfare and living standards not only between countries, but also between regions, e.g. between urban and more sparsely populated areas. Furthermore, the normative framework for what is considered adequate housing varies across generations, individuals and families, taking into account economic, social and cultural norms and resources.

It can therefore be concluded from the academic literature and policy documents that what is referred to as housing need is made up of needs and aspirations. While housing need has quantitative and qualitative aspects and is characterised by the individual's need to satisfy basic needs, housing desire is the aspiration for housing that goes beyond the satisfaction of basic needs. Together, however, they form part of a housing demand that must be met by housing supply. In any case, housing policy is often needed to ensure supply, especially of what is needed, so that a housing crisis does not develop. In addition, they are likely to change over time and have different characteristics even within a society, although aspirations may be held across generations. It is therefore useful to reflect at an empirical level on the understanding of what constitutes a need, demand or aspiration in order to inform housing policy frameworks. In this sense, aspirations and needs are also closely related, but the literature has suggested that there is an objective difference between needs and aspirations, focusing on the objective of meeting housing needs to ensure autonomy and health as a prerequisite for social participation and inclusion. Housing needs and aspirations are deeply intertwined with the normative values of a society and notions of the welfare state. It is therefore useful to apply a country- or even region-specific focus to further research. It is also necessary to involve different stakeholders and perspectives in order to capture different understandings and insights.

3. The status quo: Supporting the fulfilment of housing needs in Tyrol

The housing market in Austria is highly regulated by laws at different governmental levels (Matznetter, 2002; Matznetter & Mundt, 2012). In addition to laws at the national level that support tenants and also (for the part of the housing stock built before 1945) regulate rents (Mietrechtsgesetz, RIS 2024a), the public sector has the possibility to subsidise housing and provide public housing. Housing subsidies are

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provided by the federal states (Länder), which have their own regulations and differences in what is subsidised and who is allowed to live in subsidised housing. More than a quarter of all dwellings in Austria are publicly owned or owned by non-profit developers (Statistik Austria, 2023). Housing is therefore seen, at least to some extent, as a good to be provided or subsidised by the welfare state (Matznetter, 2002). Compared to other countries, Austria has a large stock of social housing. However, there are large regional differences. Responsibility for the provision of housing is shared between national and federal state-level authorities. The federal state and capital city of Vienna is widely regarded as the capital of social housing, with a sophisticated interplay of different policies, instruments and actors to provide affordable housing (Kadi & Lilius, 2022; Pamer, 2019). While in Vienna more than half of the population lives in publicly owned or subsidised housing, the rest of Austria is mainly dominated by a private housing market, including owner-occupied housing. In Tyrol, 76 % of all dwellings are privately owned and around 15 % are owned by non-profit housing developers, in addition to 6 % of dwellings owned by municipalities (Statcube, 2024).

Access to the public housing sector and housing subsidies is usually regulated and limited by income level and household size, or by the size of the dwelling. Additional regulations may include the existence of specific (urgent) needs (e.g. moving out of the parental home or starting a family, etc.) and the lack of other housing options (see Franz & Gruber, 2019). In the province of Tyrol, subsidies are only available if the household income does not exceed a certain amount. Furthermore, subsidies are only available to individuals or households that have their main residence in the federal state. Housing subsidies in Tyrol are available to non-profit housing developers, but also to people building their own home, as well as for the purchase of existing housing stock and for renovation measures, e.g. insulation or providing subsidies for switching to low-carbon heating systems. Housing subsidies can therefore also be used for the construction of single-family houses (see Land Tirol 2024).

In addition to federal regulations, there are also national laws that define housing needs in Austria. A "dead law" that still exists is the 1974 Land Procurement 1974 Act (Bodenbeschaffungsgesetz, 1974; RIS, 2024b). Put simply, this law regulates the possibility of expropriating land in the event of an acute housing shortage. The Act defines housing need in qualitative and quantitative terms. According to the Act, a quantitative housing need exists when 2 % of households in a municipality are registered as housing seekers (Section 4(1)) and have been recognised as such by the municipality. A qualitative housing need exists if more than 10 % of the available housing is considered inadequate (e.g. lack of public services). However, the law has never been applied since its adoption. In the federal state of Tyrol, the regulation has recently attracted attention, as the capital city of Innsbruck has officially declared a housing shortage within the meaning of the law. However, the state of Tyrol, which is responsible for the legal recognition of this declared housing short-

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age, rejected the application. One of the arguments against the application was that the city of Innsbruck has a high number of vacant dwellings. Eight per cent of the city's housing stock – according to a recent official statistical count – had no housing registration and were therefore counted as unoccupied (Stadt Innsbruck, 2024). Another argument was that the housing need, as determined by the city of Innsbruck on the basis of waiting lists, did not reflect actual housing need but rather housing aspirations (e.g. that people would like to have larger apartments without needing them). This brings us back to the original problem of the manuscript, which is what constitutes housing need in the first place. The results of a target-setting workshop with the Tyrolean administration are presented and discussed below.

4. Empirical insights on what is considered a "housing need"

During a goal-setting workshop in the context of a study on future housing needs in Tyrol, the main objective was to obtain first qualitative insights into the (perceived) housing needs of the Tyrolean society from a group of experts consisting of public policy stakeholders. Furthermore, expertise was gathered in order to find future ways for the Tyrolean housing policy as well as responsibilities in the context of satisfying housing needs (e.g. implementation of policies according to the governmental level, operative actors potentially able to take over the provision of housing needs, etc.). Finally, the workshop was also used to raise general awareness of the issue and to activate collective problem solving. For our paper, the results of the workshop will be presented and reflected upon in order to gain an understanding of what is considered as housing demand or need and how the latter differs from aspirations. A deeper understanding should not only inform theoretical conceptualisation, but also promote acceptance of housing policy measures. The aim of the workshop was not to develop an own definition or to test an existing one, but rather to gather different experiences and viewpoints. Even if these points of view do not reflect all the different opinions in the federal state of Tyrol, the goal-setting workshop did provide an insight into how housing needs and demands are perceived and which responsibilities for meeting housing needs are seen as existing or urgent.

4.1 Methodological design or the goal-setting workshop

The goal-setting workshop was designed as a participatory qualitative method (Bergold & Thomas, 2012; Unger, 2014). According to Dangschat (2005), participatory processes are important prerequisites for decision-making processes, e.g. in terms of systematised communication or the activation of the participants involved. In this context, Unger (2014) describes the enabling, co-creation and empowerment processes, which are based on the basic attitude of participatory research, "which is characterised by an appreciation of the knowledge and skills of everyday actors" (44) and can thus increase the acceptance of the results (Walser

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et. al., 2016). The methods of participation are essentially based on qualitative social research methods (Flick et al., 2013). A modified form of group discussion (Bohnsack, 2013) was applied, using the so-called placemat method (Reich, 2010). The chosen conceptual approach provides a meaningful opportunity to combine the empirical research interest with the participatory involvement of the experts in relation to the question of the goal-setting workshop.

The goal-setting workshop was the first phase of a comprehensive study of the future housing needs of the federal state of Tyrol and was conducted with various specialised departments of the provincial administration. The primary objective was twofold: firstly, to inform and involve the relevant experts in the field of housing. Secondly, it aimed at a broad discussion and joint clarification of the target concept "What does housing need mean?" The focus was on housing types, target groups, policies and strategies, as well as actors and responsibilities at different levels of action (federal, provincial, municipal) and governance. The round 20 experts who took part represented a wide range of expertise, including housing promotion, spatial planning, statistics, building law, land funds, regional development, society and work, social affairs, inclusion and participation, child and youth welfare, as well as political representatives of the governing parties.

The workshop was divided into two working sessions. The first discussed general strengths, weaknesses, opportunities and challenges of housing in Tyrol. The second session explored different dimensions of "housing needs" in order to explore the basic understanding that exists at the level of the state administration. For this purpose, the group of experts was divided into three small groups, mixed in terms of expertise, in order to hold smaller round-table discussions on the following four main questions: (a) What is perceived as a housing need and what housing needs exist today in the federal state of Tyrol? (b) Are there housing needs of specific groups that require action and should be addressed? (c) Which political level is responsible for meeting the housing needs and what are the possible governance implications? Each aspect was first worked on individually by the experts, recorded on note cards and then discussed together in plenary, supplemented and grouped into overarching categories.

Place-mat allows for individual work at the beginning and then leads, step by step and in a structured way, to a group-specific analysis of the given question (Reich, 2010). Each phase is accompanied by a facilitator, which was provided in the form of a table moderator. The facilitators have the opportunity to intervene in the discussion process and ask for clarification of arguments. The documentation of each phase is done directly and immediately by the participants (possibly with the help of the facilitators at the table) on cards or on the place-mat. It is therefore visible, transparent and can be commented on at any time. The results of the place-mat method were documented photographically and detailed notes were taken immediately after the workshop, including further information such as

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specific discussions that took place at the different tables or specific values that were presented by different stakeholders.

The results of the workshop served mainly as a first orientation for the housing needs study conducted in Tyrol and were analysed using qualitative content analysis (Mayring, 2022) with closed coding (Mayring, 2022; Braun & Clarke, 2006). The main themes of the workshop (according to the questions asked) were: housing needs, target groups, actors and governance strategies. Open coding techniques were also applied. In the spirit of participatory analysis, the discussions were summarised and clustered by the facilitators during the workshop and reflected upon together with the participants. Of particular interest were the commonalities, agreements and disagreements between the different experts, departments and responsibilities. The final analysis was not participatory, but was carried out solely by the scientific project team. The results are presented in the following section. In a further step, the results were then discussed in the light of the academic literature presented earlier.

4.2 Empirical results: Stakeholder's perspective on housing needs and demands

The empirical results are presented below in order to provide an insight into what is a common understanding of "housing need" from the perspective of a governance stakeholder. The findings are presented alongside the main questions posed during the workshop, which also served as the main categories of investigation during the workshop.

4.2.1 Housing needs in the federal state of Tyrol

The workshop began with the question of what is perceived as a housing need and what housing needs exist today in the province of Tyrol. In general, all participants agreed that there is a high demand for housing in Tyrol. Most participants agreed that there is a need for housing in terms of both quantitative and qualitative criteria (e.g. adequate size and number of rooms per inhabitant, affordable costs, quality of housing, etc.). In particular, finding affordable housing was seen as a clear challenge in all regions of Tyrol. The reasons for the demand were not discussed in detail, but a growing population and a lack of available building land were mentioned as general causes. The attractiveness of Tyrol for investment opportunities was also mentioned as a major challenge in relation to affordable housing.

There was a broad consensus among the participants that, in addition to the need for housing, there is a demand for housing in Tyrol that cannot be considered essential. Tyrol, widely seen as a place with attractive landscapes and amenities, is emerging as a compelling arena for investment and speculative activity in the real estate sector. Workshop participants agreed that the interests of investors in their quest for profitability place significant constraints on the feasibility of providing af-

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fordable housing. Therefore, regulations to counteract housing demand in the form of housing speculation should be widely implemented. There was also agreement that second homes and holiday homes in the Tyrolean housing market should be regulated, which is already the case in most municipalities. Thus, some housing demand could be clearly distinguished from housing need.

While there was common ground on the issue of housing demand versus housing need, there were different arguments depending on which form of housing was understood to be essentially needed. Some workshop participants argued that a housing need exists when residents don't own their homes, and that meeting a housing need means enabling as many people as possible to own their own homes, as this is seen as the only secure form of housing. This view was not shared by others, who not only saw it as unrealistic at present, but also saw home ownership not as an essential need, but rather as an aspiration that may not be possible for everyone. Throughout the discussion, participants agreed that it should not be a question of owning versus renting, but rather a complementary approach, as both options are desired and needed. Whether renting or owning, both types of housing were therefore seen as appropriate to be subsidised by the state. However, some participants argued that it may be necessary to consider whether owner-occupied and single-family homes should be prioritised in housing subsidies. There was a notable emphasis on the nuanced consideration of specific needs, especially those of vulnerable groups, within the broader framework of housing needs. This nuanced consideration is the focus of the next section, which looks in more detail at the specific needs of marginalised and vulnerable groups.

4.2.2 The vulnerable requiring specific attention

The question of who's housing needs should be met and prioritised supported the clarification of what constitutes a housing need and was therefore a follow-up to the latter discussion. As a first step, most tables attempted to identify vulnerable groups that are usually in need of housing, and later discussed whether and how the needs of these groups could or should be prioritised. The following groups were identified at the tables: families, young people, students, migrant or seasonal workers, elderly people (especially those in need of care) and homeless people. The housing needs of families and young people are usually related to housing adaptations in the context of partnership formation, family formation, childbirth and further migration during younger years (e.g. for education or work purposes). Migrants were also mentioned as a group with increasing housing needs in Tyrol. While there are a large number of students migrating to Tyrol for educational purposes, a large number of people come as (seasonal) workers (especially in the tourism sector, but also in other sectors such as the care sector). Their vulnerability often develops as migrants and newcomers are excluded from established housing support systems (e.g. subsidised rents, access to social housing) in the first years

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after their arrival and often have to meet their housing needs on the open market. This often results in high rent-to-income ratios.

Once the groups had been defined, a prioritisation of housing needs took place. On one table, workshop participants prioritised the need to address homelessness first, followed by those whose housing needs are not adequately met in their current situation, then the needs of seasonal workers, and finally the need or aspiration for home ownership by young people and families, with priority given to more vulnerable groups. In contrast, another table clearly prioritises the housing needs of young people. In this table, homelessness was not seen as an issue with high relevance in Tyrol. The housing needs of migrant populations (which often include students, international workers, seasonal workers, temporary population) were not identified as an issue with a clear federal or public responsibility, but rather as a specific challenge of individual cities or municipalities and with additional responsibility of specific economic sectors (e.g. tourism sector). While housing policy in other countries and cities is clearly focused on people in a precarious housing situation or to combat homelessness, as well as on people who represent a vulnerable group in the housing market (e.g. students, migrants, low-income groups), in Tyrol we therefore find a broad concept of who is supported to meet their housing needs, including the middle class. Housing for the elderly was also mentioned as a need that is likely to increase in the future. While some stakeholders mentioned that the system of care for the elderly in the federal state of Tyrol is currently at a high level, the ageing of the large cohorts of the baby boomer generation was seen by others as a challenge because of the increased need for barrier-free housing or housing with care facilities.

4.2.3 Key actors to fulfil housing needs and suggested policies

In most of the tables, the government bodies identified as key actors in the assessment and management of housing needs are municipalities, planning associations (consisting of entities of several municipalities for inter-municipal cooperation) and higher government levels (either at state or federal level). In the Austrian context, legal frameworks at the national level have a discernible influence on housing affordability, exemplified by laws such as the Tenancy Act (Mietrechtsgesetz). Conversely, in the federal state of Tyrol, regulatory measures on affordable housing are mainly manifested in the area of spatial planning legislation, exemplified by initiatives such as the allocation of land for affordable housing and the regulation of second homes. As municipalities are responsible for translating legislation into concrete instruments, the workshop identified them as by far the most important actors in meeting housing needs.

Participants discussed a wide range of options and sectoral responsibilities for housing policy. There was consensus that the existing instruments of spatial planning and public housing promotion offer a wide range of possibilities. The guiding

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principle for these two areas should be to promote the densification of existing built-up areas (redensification). Policies and applied measures should also focus on the promotion of multi-storey residential buildings rather than single-family houses, in order to limit land consumption and contribute to energy efficiency through compact architecture. However, this view was not shared by all participants.

Various ideas that go beyond the existing range of instruments have also been discussed. Examples are different variants of rent-to-own options and the right of first refusal for first homeowners. An extension of the existing rent control caps for tenements built before 1945 to the decades after 1945 was further proposed. Additionally, there were calls for greater support for social housing through appropriate zoning, accompanied by forward-looking spatial planning that goes beyond mere parcel thinking. New forms of housing were also discussed. In the light of demographic developments, one table discussed new forms of housing for the growing number of elderly people.

5. Theoretical reflection of the workshop results

The discussions in the goal-setting workshop with public policy stakeholders on contemporary housing needs in Tyrol not only provided insights into the situation in Tyrol, but also gave impetus to reflect theoretically and empirically on concepts and understandings of housing demand, housing needs and housing aspirations. The workshop showed that the question of what constitutes a housing need is very much a normative question, deeply linked to the cultural values of a society. This became clear during the workshop as people not only presented their professional perspectives, but also provided insights into their personal norms, and also political values.

It was suggested during the workshop that there are specific perceptions of what kind of housing is considered safe and adequate, which is an essential question when considering what constitutes a housing need. For many workshop participants, owner-occupied single-family homes are not only a preferred housing option to be realised, but also the only secure housing option, although not all participants agreed. For these workshop participants, meeting the demand for single-family houses should be the clear objective of housing policy in Tyrol. Discussions during the workshop suggested that other participants saw a need to rethink these values, as they have originated in the past, and may only be replicated because of the lack of alternatives. In this sense, the results of the workshop underline the need to reflect contemporary forms and types of housing. In order for people to see other types of housing as safe and adequate, it may be necessary to show how housing needs can be met without building single-family houses. New types of housing alternatives and concepts would need further attention and testing to determine their suitability for Tyrolean needs. Housing policy can play a key role in providing a system that allows and supports the development of different types of housing. As

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the question of whether single-family houses should be subsidised at all was raised at one workshop table, further reflection on what form of housing subsidy actually supports the fulfilment of a need or aspiration may be necessary.

Another point of discussion in the workshop was who's housing needs should be prioritised. While the majority of participants agreed that the housing needs of certain, predominantly vulnerable groups should be in the focus, there was no clear guideline on who should be prioritised in housing policy. This may also be related to the fact that – as of today – there is no monitoring instrument at the federal level to collect information on existing housing needs (e.g. through waiting lists, which exist only at municipal level and follow different rules). Some participants showed a tendency to prioritise support for the housing needs of young people in the pursuit of their housing aspirations, while for others economically vulnerable groups were in the focus. Specific housing needs (e.g. students, seasonal workers) were defined as challenges only in some specific regions of Tyrol (university towns, tourist destinations) and therefore with a specific regional or local responsibility. Tyrol is a region with very different realities. However, all the different contexts must be taken into account when designing a federal housing policy. Therefore, the housing of the large number of students, during their studies, but possibly also after their studies, may require more attention when considering the housing needs of contemporary Tyrolean society. This consideration is closely linked to societal values and the fundamental question of who is perceived as an integral part of the social fabric. The increasing diversification of Tyrolean society plays an important role here and may require more attention. The housing needs of a diversifying society may need to be seen as an issue for the province as a whole and not just for individual locations. This may also require more attention to the exchange between different stakeholders and the development of holistic and more integrated policy strategies, e.g. in terms of vertical multi-level governance or horizontal cooperation (e.g. cooperation between municipalities/ city-regional perspective).

As housing policy in Austria is fragmented across different levels of government, greater integration of the different approaches and regulations at local, regional and national levels could help to find solutions to the various challenges that exist. Participants in all of the workshop sessions emphasised that municipalities have the primary responsibility for directing the provision of adequate housing, which has a direct impact on the satisfaction of housing needs. The ability of municipalities to proactively secure land has been significantly enhanced in recent years, with legislation provisions designating specific zoning categories for the exclusive use of affordable housing. Although Austrian municipalities have the power to regulate housing through zoning and building regulations, there are still cases where municipalities are unaware of their power and authority in this regard. In recent years, legislation has provided for specific zoning categories that could be dedicated to affordable housing. Despite this, some municipalities have not taken action to use these instruments. It may be that further activation of municipalities is required

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to ensure that they become active in securing future housing needs through these instruments.

6. Conclusion: Defining needs, demands, aspirations for designing housing policies

In order to gain further insight into the complex issue of what constitutes a housing need, the results of a goal-setting workshop conducted in the context of a project on the future housing in the federal state of Tyrol were used to reflect on the understanding of a housing need and on how it can be distinguished from housing demands and housing aspirations. This conceptual clarification was set out with the objective of establishing a fair and equitable housing policy. The workshop did not provide a definitive answer, but it highlighted the inherently normative nature of this issue and the necessity for ongoing reflection and potential adaptation. The workshop revealed a degree of controversy over the interpretation of housing needs. There was no clear consensus on the extent to which housing needs should or can be distinguished from housing aspirations. While some saw home ownership as an important factor for autonomy and (financial) security, others felt that the desire for home ownership (and even more so for single-family homes) was linked to wishes and aspirations of previous generations. For designing future housing policy and for implementing a valid monitoring of housing needs (e.g. through waiting lists) clear guidelines of what qualifies as need will anyway be necessary. There was a consensus among the participants that the focus of housing policy should be on meeting housing needs, as opposed to meeting housing demand, especially that driven by investor interests. However, even if there is a broad consensus on this point, a more nuanced view of who qualifies as an investor would be needed, as housing as an investment opportunity is today pursued not only by large (international) investors, but by society as a whole. This is also why regulations are often difficult to be implemented or fail to gain acceptance (e.g. vacancy tax, contractual arrangements). It therefore may also be necessary to further emphasise the interdependence between the ability of satisfying housing needs and regulating housing demands and aspirations, as instruments are able to ensure the availability of building land or apartments.

The workshop demonstrated that for a significant proportion of stakeholders, home ownership and single-family homes remain the most desired forms of housing and that the fulfilment of young people's aspirations is a priority for many stakeholders. However, the workshop participants also indicated how housing desires might be linked to aspirations of previous generations, also discussed as "aspirational lag" in the academic literatur (Preece et al., 2020). It would therefore be beneficial to consider what types and forms of housing could or should be achieved in the future. This also includes further research of the actual aspirations and desires of (the diversity of) young people, including also their capabilities. In general, there

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is a need for continuous reflection at the political and societal level on the needs, demands and aspirations of the population. And with the emergence of new housing typologies, their potential to address the current housing market crisis needs to be further assessed. Challenges of today require a more inclusive and ecologically conscious paradigm for housing considerations and a critical reassessment of the fundamental requirements and aspirations of society. A focus on the overarching objectives of housing policy, namely the promotion of healthy and independent living, must anyway be pursued as the primary objective of housing policy.

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