

O-HB Observatori Metropolità de l'Habitatge de Barcelona

Barcelona Metropolitan Housing Observatory

June 2018



**Ajuntament
de Barcelona**



**Generalitat
de Catalunya**



**Diputació
de Barcelona**

#DibaOberta

With the support of:



INTRODUCTION

Main goals



To support the definition of more effective public policies for housing



To bring information to the public

Operational objectives



To elaborate in-depth analysis of housing databases and studies, and centralize all available data

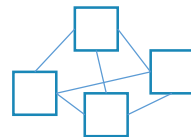


Improve the existing data because of the asymmetric level of disaggregation depending on the field



Fill existing data gaps through laboratories

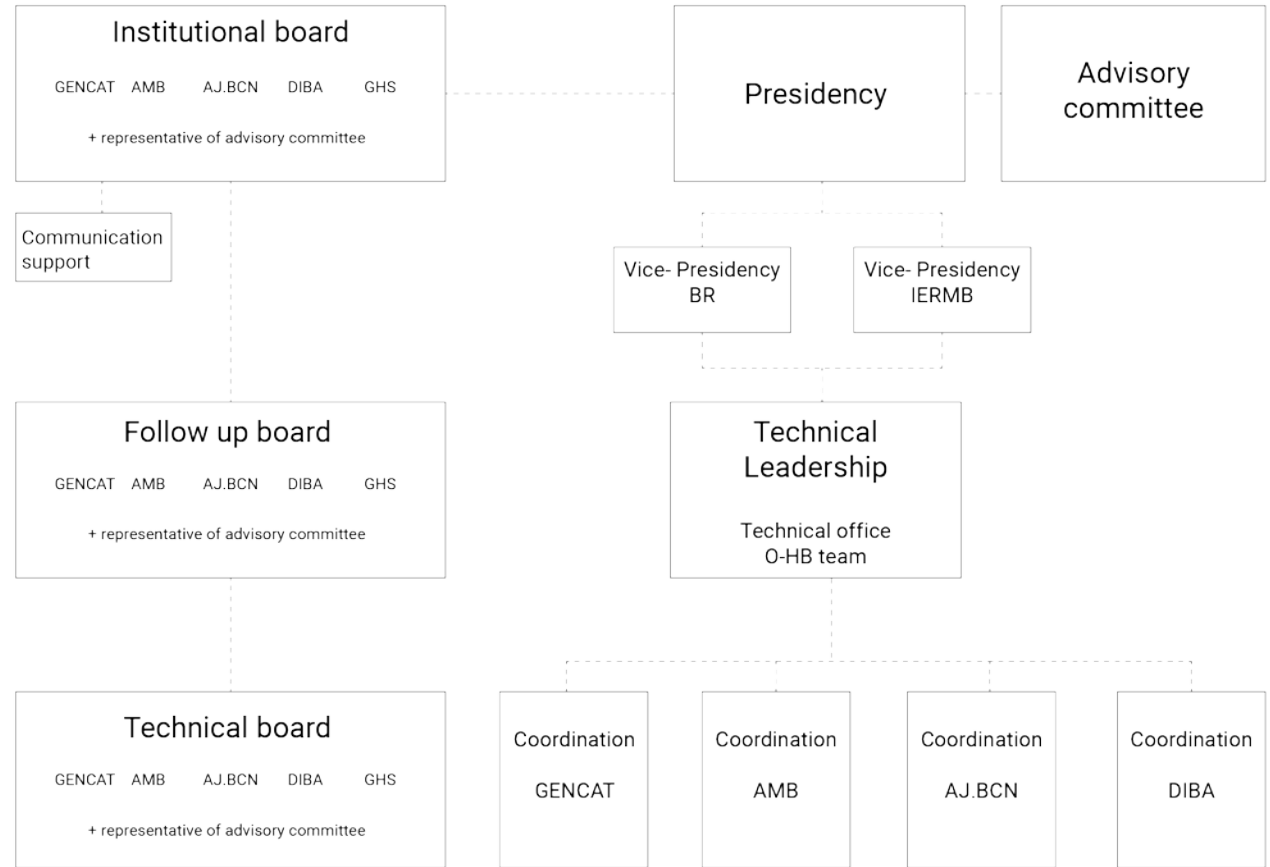
Structural objectives



Share knowledge and projects developed with the different agencies of the administrations and organizations involved

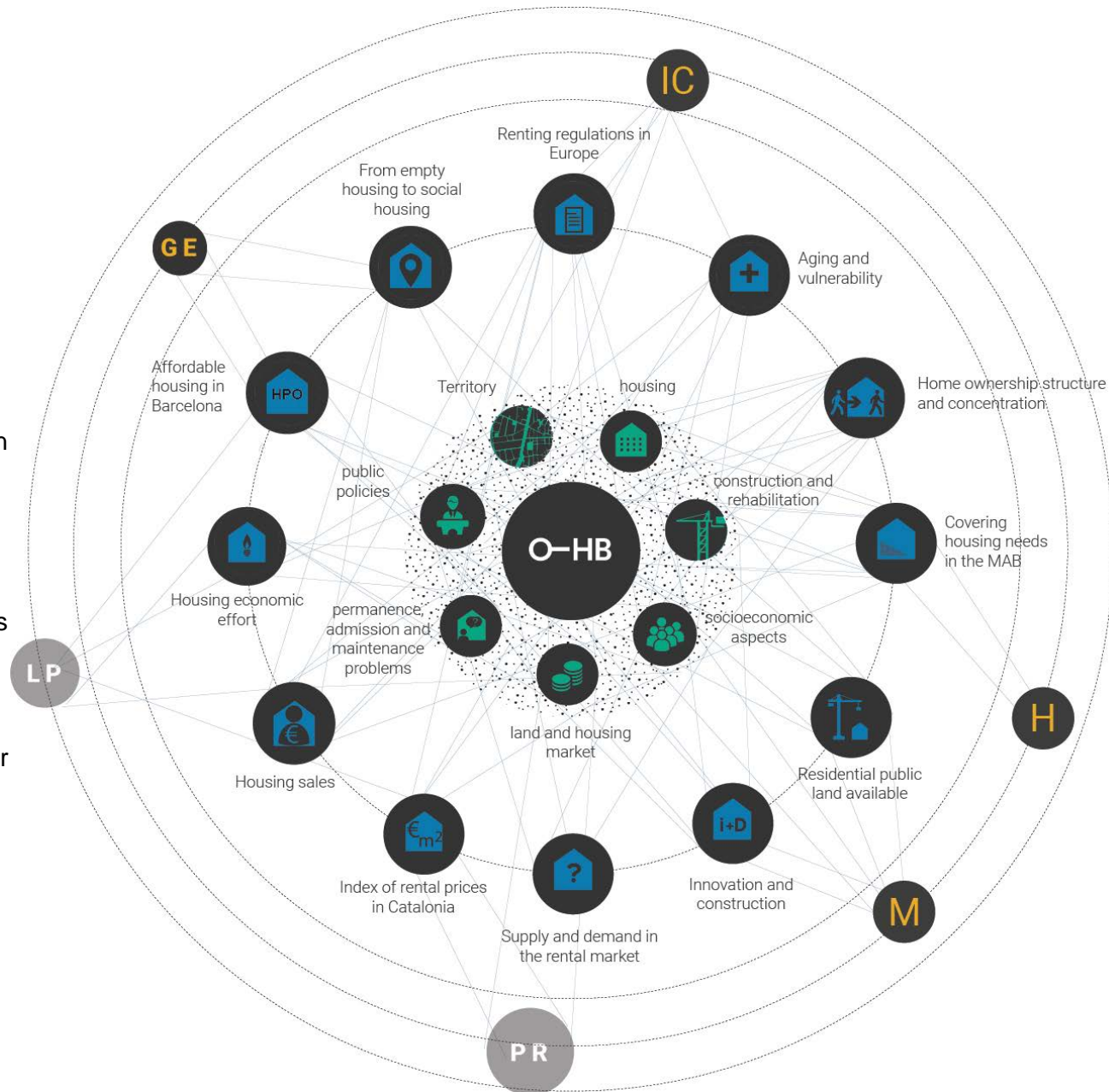
ORGANISATION STRUCTURE

Networking



CONTENTS

- **Indicator system**
 Design and maintenance of a common database on housing issues
- **Laboratories**
 Specific studies on a particular issues
- **Collaborations**
 Support in different studies from other agencies



PROJECTS

2017 (completed)

- **Indicator system**

Housing in the metropolitan area of Barcelona 2017
Visualization data

- **Laboratories**

Comparative study of the rent regulation in Europe
The Index of rental prices in Catalonia
Supply and demand in the rental market

- **Collaborations**

Gentrification
Innovation in construction

2018

- **Indicator system**

Housing in the metropolitan area of Barcelona 2018
Visualization data

- **Laboratories**

Index of rental prices in Catalonia
Housing sales (through the property registers)
Home ownership structure and concentration
From empty housing to social housing
Aging and vulnerability in the metropolis of Barcelona
Housing economic effort
Affordable housing in Barcelona
Covering housing needs in the MAB. From the PTSHC to the PDU
Affordable housing management models
Residential public land available
Rental market

- **Collaborations**

“Xifres d'habitatge” (“Numbers on Housing”) – Barcelona City Council
Support giving to elaborate “Local Intervention programs on housing”
Research on housing necessities in Gavà
PAI residential vulnerability in Besòs area

INDICATOR SYSTEM

Housing in the metropolitan area of Barcelona. 2017



Indicator system

- I. Housing and other social needs: population and homes
- II. The housing stock
- III. Building and rehabilitation
- IV. IV. The housing market
- V. V. Problems of permanence, access and maintenance of House
- VI. VI. Housing polices
Recommendations

Summary

Report that includes all the statistical content with the aim of detecting those issues of greatest interest for the evaluation and design of housing policies

INDICATOR SYSTEM

Areas of study

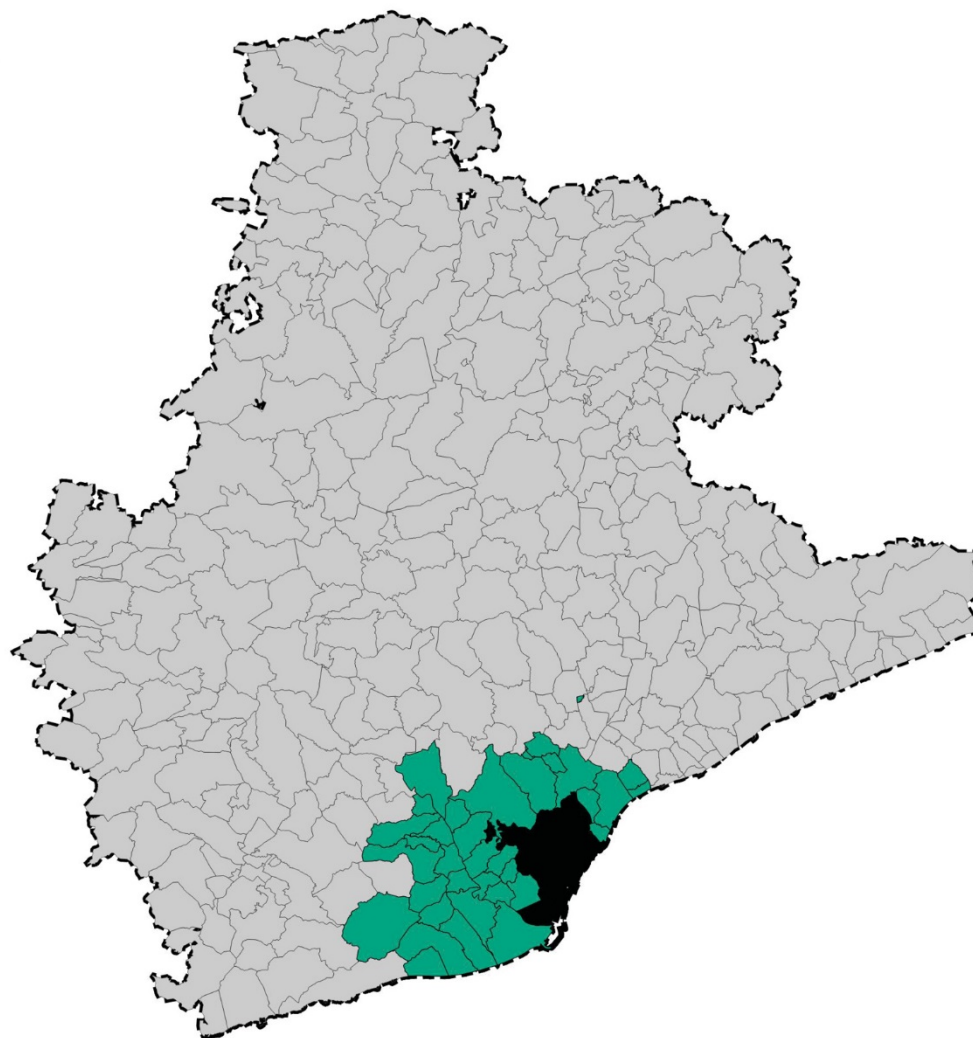
The indicator system displays general data for the city of Barcelona, the Metropolitan Area of Barcelona and the province of Barcelona.

It also includes some information for the Autonomous Community of Catalonia.

Province of Barcelona

Metropolitan Area of Barcelona

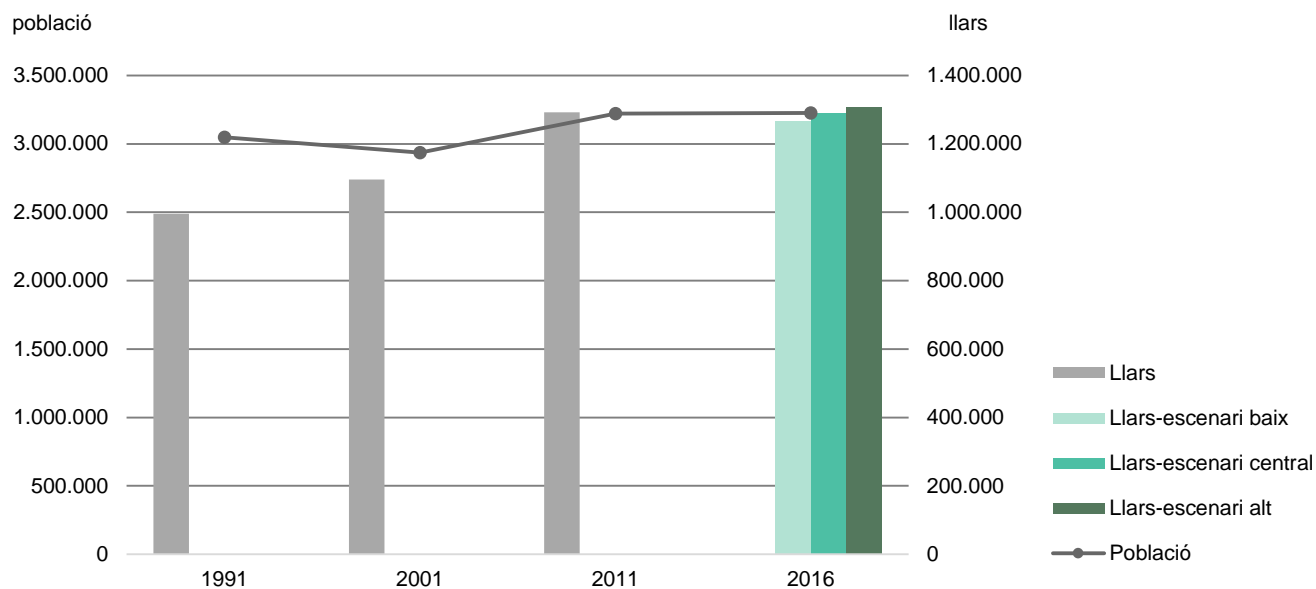
City of Barcelona



Population and household stabilization in the metropolitan area

With around 1,610,000 inhabitants, Barcelona's population shows being stable for the last 6 years; MAB has around 3,220,000 inhabitants, and the demarcation around 5,530,000.

Population and household units in the MAB 1991-2016



Source: Idescat, Cens de població i habitatges, 1991, 2001 i 2011, padró continu de població 2006; Secretaria d'Habitatge i Millora Urbana, Pla Territorial Sectorial de l'Habitatge.



There's the need to improve the monitoring of the household units evolution: number and typology



Increasing number of rental contracts

For 2017, the number of contracts is:

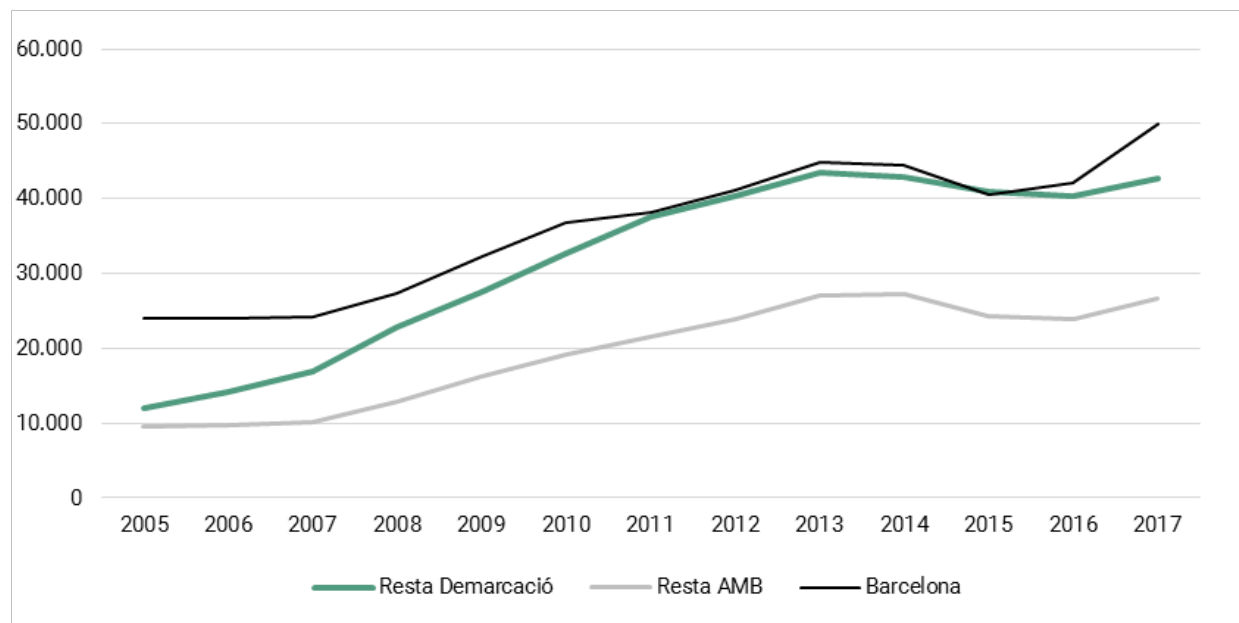
49,953, in Barcelona

26,592, in the rest of the MAB

42,777, in the rest of the Province

In relative terms, Barcelona is the area registering the highest number of contracts / 1,000 inhabitants (30,8)

Evolution of the number of rental contracts. Territorial areas. 2004-2017



Source: Secretaria d'Habitatge i Millora Urbana, a partir de les fiances dipositades a l'INCASÒL



We need to include more information on the rental contracts, like length, and distinguish between new contracts and contract renewals



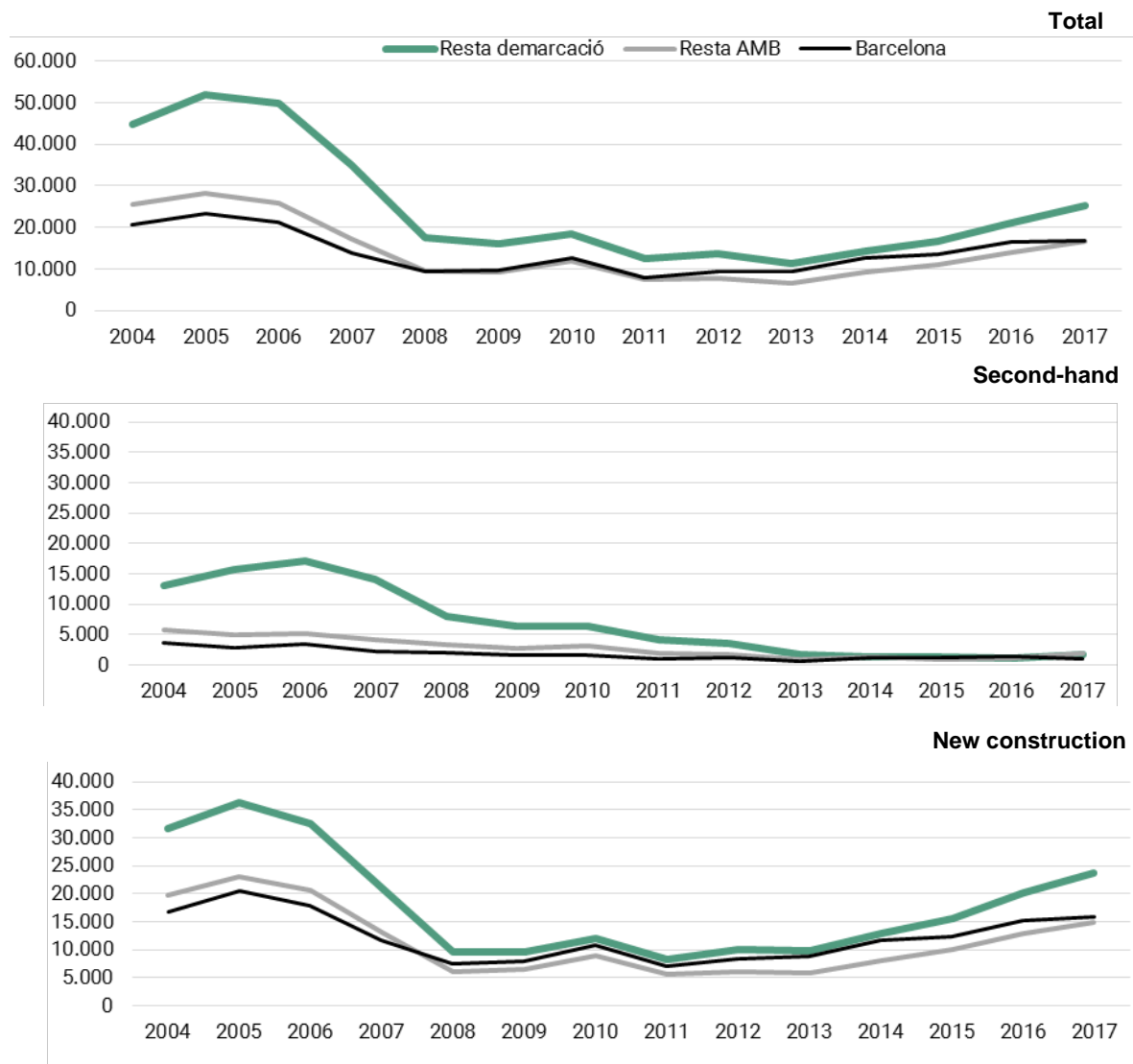
Sale and purchase transactions recovery. Specially second-hand sale transactions after 2013, the great fall during the crisis

Since 2013, the increment on the volume of transactions proves to be:

- 114% in the Province
- 109% in the MAB**
- 79% in the city of Barcelona

Indicators system

Evolution of new construction and second-hand housing purchases. Territorial area. 2004-2017



Source: Ministerio de Fomento, a partir del Consejo General del Notariado



Sharp rise in housing average prices in the last 3 years

Between the 4th trimestre in 2014 and the forth trimestre in 2017:

In Barcelona city, the average price of housing units has increased by:

- 23,7% for new construction housing units
- 45,4 % for second-hand units
- 26,1 % for rental contracts

The rest of the MAB shows the following price increase:

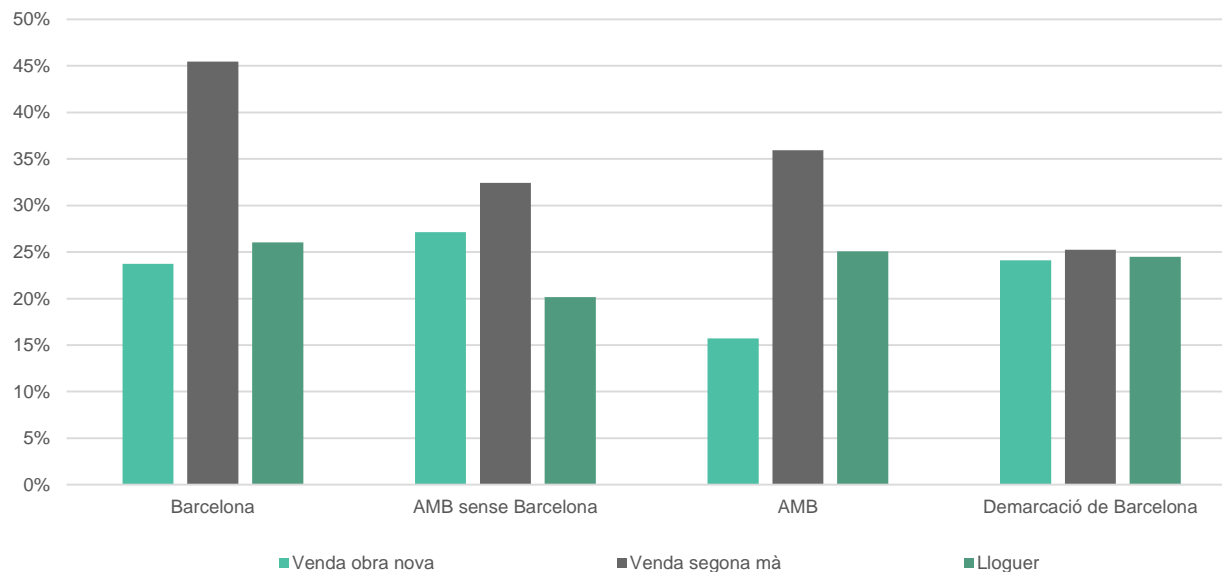
- 27,1 % for new construction housing units
- 32,4 % for second-hand units
- 20,2 % for rental contracts

Indicator system

Average price. New construction, second-hand and rent. Territorial areas. 4th trimestre 2017

Area name	New construction (€/m ² built)	2nd-hand (€/m ² built)	Monthly rent (€)
Barcelona	3924,34	4.010,80	889,58
MAB without Barcelona	2612,83	2.213,90	706,28
MAB	2936,29	3.160,95	828,71
Demarcació de Barcelona	2262,56	2.329,27	741,30

Variation of the housing average price New construction, second-hand and rent. Territorial areas. 4th trimestre 2014 – 4th trimestre 2017



Source: O-HB elaboration with data from Secretaria d'Habitatge i Millora Urbana, a partir les dades del "Colegio de Registradores de la Propiedad, Bienes Muebles y Mercantiles de España" i les fiances de lloguer dipositades a l'INCASÒL

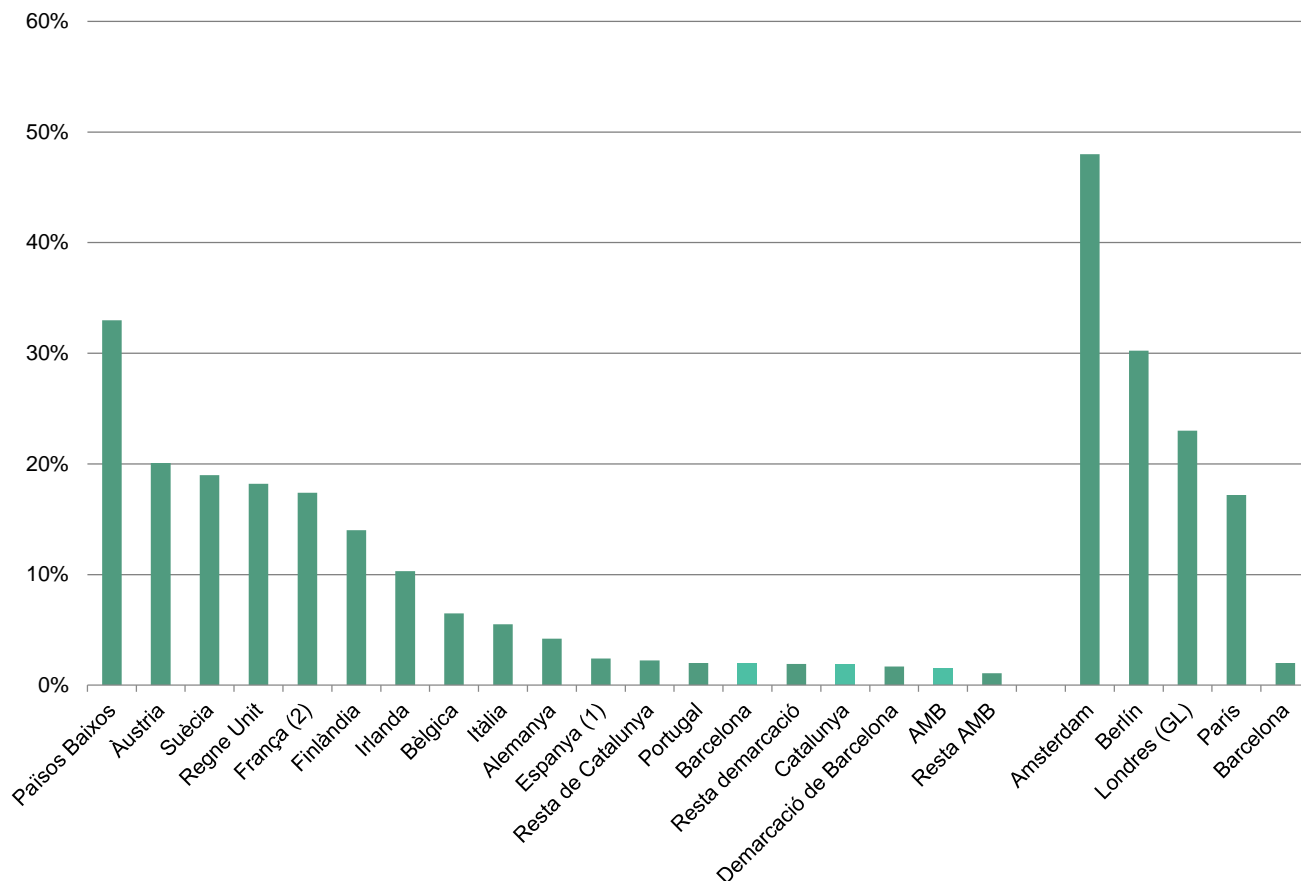
The available stock for social housing is very limited. It proves to be one of the smallest in the EU.

The available stock for social housing is very scarce both in the MAB and in Catalonia in general.

All studied territorial areas have less than 2% dedicated for social policies.

Indicator system

Percentage of social housing. 2011-2013



Country-relative data for the years 2011-2013 has been taken from Housing Europe.

(1) Data for Spain and MAB comes from 2011 INE Census, "Habitatge cedit gratis o a baix preu".

(2) In France: "Public housing for rent".

Data on European cities come from Pilar Garcia Almirall study (UPC) on housing policy models.

INDICATOR SYSTEM

Data display



Housing stock



Construction and building renovation



Social and demographical features



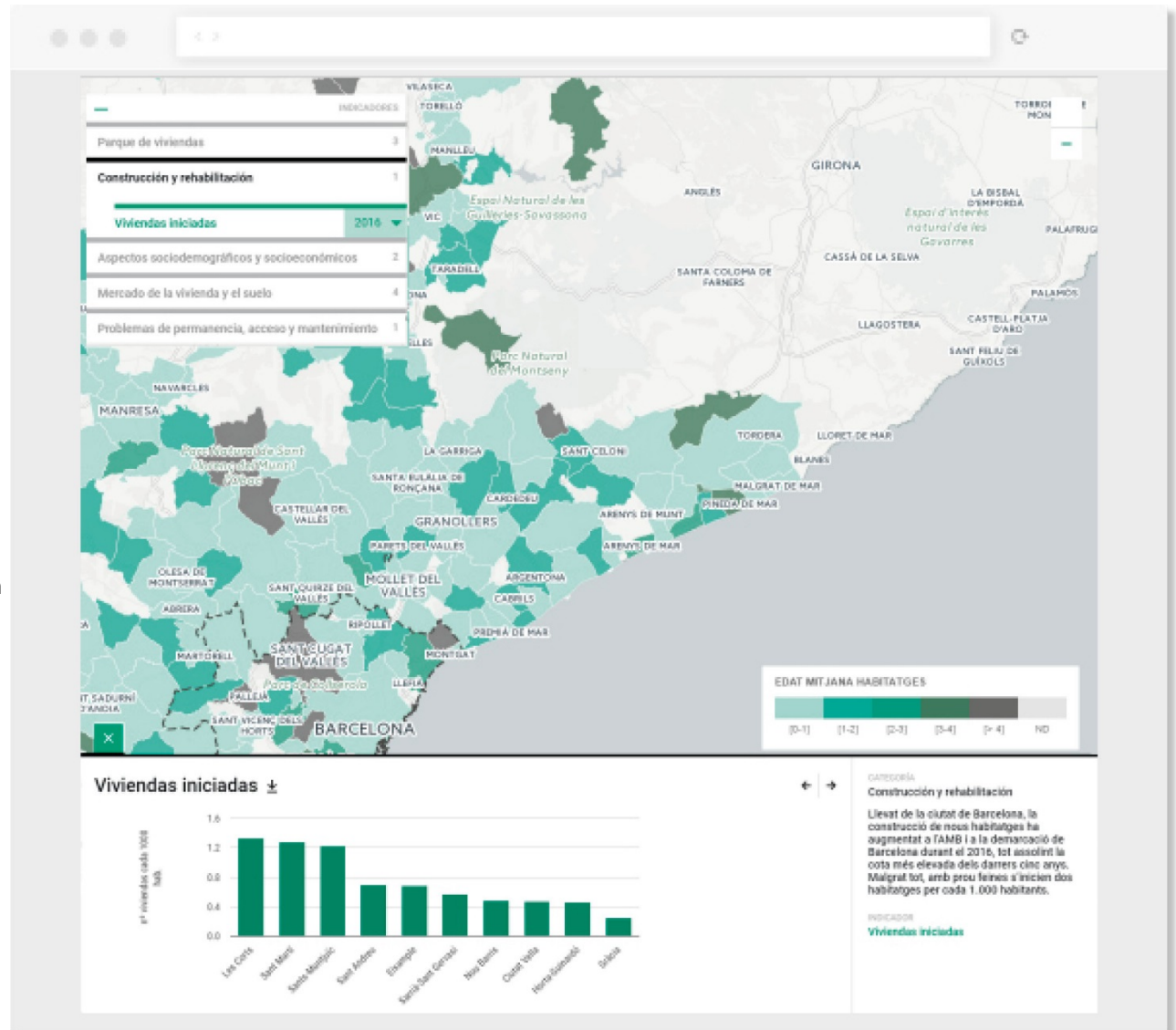
Housing market



Permanence, admissions and maintenance problems



Public policies



LABORATORIES

2017-2018

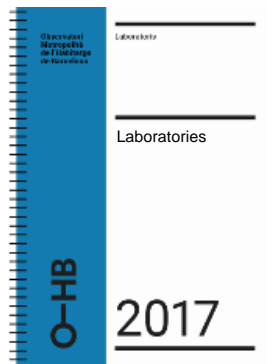
Laboratories

2017

- Comparative study of the rent regulation in Europe
- The Index of rental prices in Catalonia
- Supply and demand in the rental market

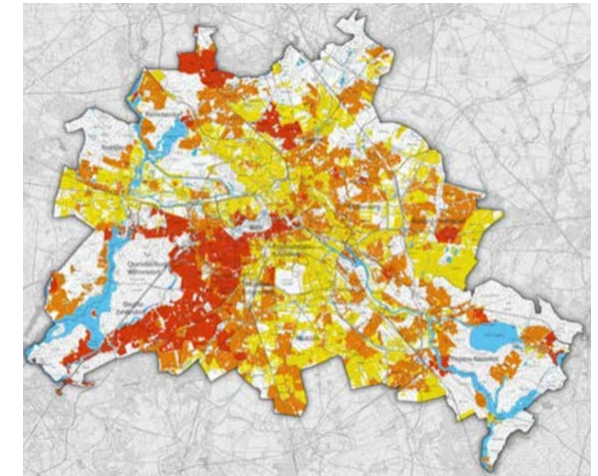
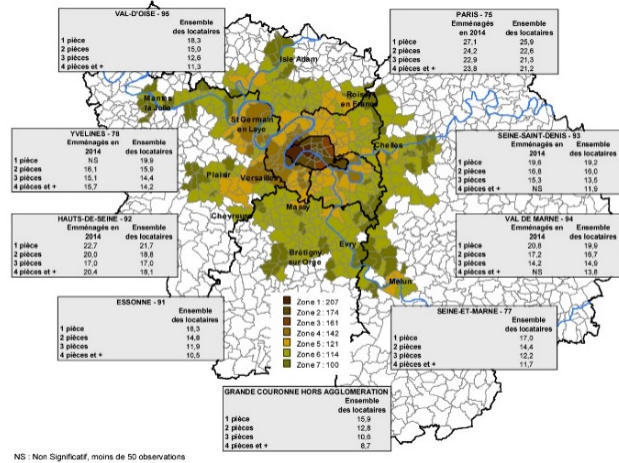
2018

- Index of rental prices in Catalonia
- Housing sales (through the property registers)
- Home ownership structure and concentration
- From empty housing to social housing
- Aging and vulnerability in the metropolis of Barcelona
- Housing economic effort
- Affordable housing in Barcelona
- Covering housing needs in the MAB. From the PTSHC to the PDU
- Affordable housing management models
- Residential public land available
- Rental market



Comparative study on rent regulation in Europe

Laboratories



Summary

This study is based on two steps: first, a contextualization of private rents in Berlin and Paris; second, analysis of the methodologies that these cities have implemented to calculate their own rental price index reference.

Comparative study on rent regulation in Europe

New rent management measures (2015)

	Berlin	Paris
Name of the measure	Mietpreisbremse "Rental price brake"	Encadrement des loyers "Rent limitation"
Reference rent	Mietspiegel "Rent mirror"	Loyer de référence "Rent reference"
Implemented since	1st June 2015	1st August 2015
Max. limit for new contracts	10% above reference price	20% above reference price (loyer majoré)
Type of contract	New contracts (the existing are already regulated)	New contracts (the existing are already regulated)
Updates	every 2 years	yearly
Elaboration in charge of	Private consultancy	Observatoire des Loyers de l'Agglomération Parisienne (OLAP)
Data source	Empirical data (surveys) and other	Empirical data (surveys) and other
Role of sector representative	Negotiation Validation of final results	Members of Observatoire government area

Comparative study on rent regulation in Europe

Creation of a price reference index in Berlin and Paris

Laboratories

Berlin

Paris

Excluded from reference price

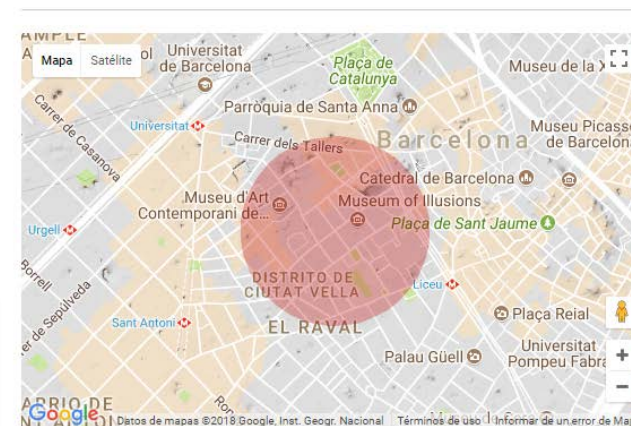
Excluded household units	Previously paying higher rents, new construction units, buildings >3 units, etc.	No remarkable exceptions
Higher previous price	Previous price can be kept	It is mandatory to low down the price until the max. allowed limit
Available information	Reference price: yes Precedent rent: no	Reference price: yes Precedent rent: yes

Determinant variables to set the reference price of a household unit

Surface	Price / m2, variation according to ranges of m2	Price / m2, variation according to nr. of rooms
Basic equipment	Heating, bathroom, toilet	With or without furniture
Age / Quality	Construction age	Construction age
Location	3 levels: basic, medium, high	80 homogeneous areas dividing 7 price levels
Specific features	Adaptation by features and particular qualities of the household unit	"Rent complement" in specific cases

The Index of rental prices in Catalonia

Laboratories



Summary

Support for the elaboration of the Rental Price Index Reference, which is being calculated by the Generalitat de Catalunya and, which will be applied to all metropolitan municipalities. O-HB contributes by providing and improving existing data on housing to enable the calculation of the monthly rental price average according to a series of parameters.



The Index of rental prices in Catalonia

This indicator enables checking and comparing average rental prices for every zone and is accessible by all citizens

Laboratories

Dades inicials

Adreça: Carrer de Sardanya, 525, Barcelona, Espanya

Radi: 300m

Nombre d'habitatges: 91

Superfície: 50 m²

Nivell de manteniment: En bon estat

Planta:

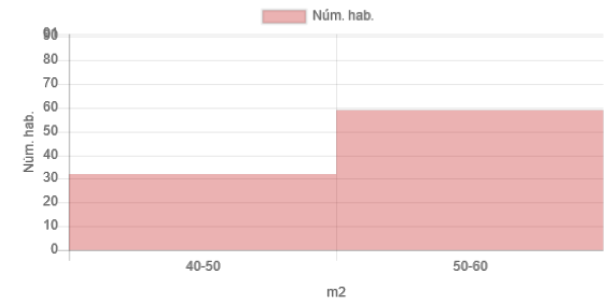
Any de construcció:

Certificat energètic:

Ascensor:

Aparcament:

Moblat:



Variables

Mandatory fields:

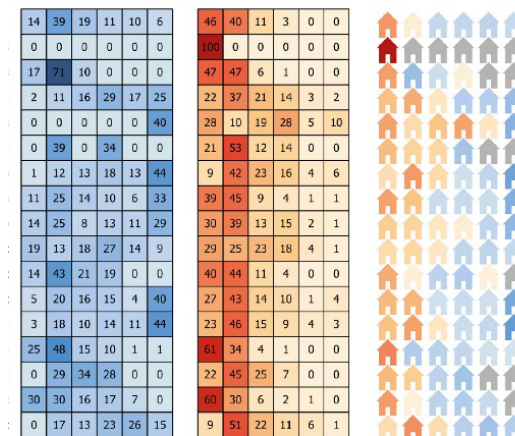
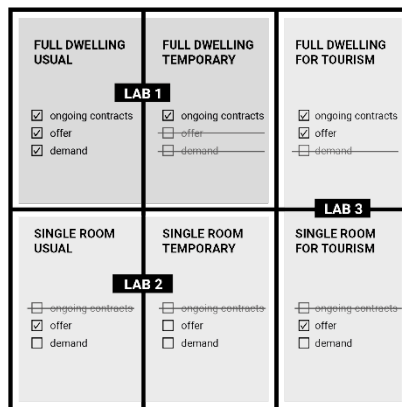
- Address
- Dwelling surface
- Maintenance state (4 types specified)

Optional fields:

- Floor
- Year of construction
- Energy certificate
- Lift
- Parking
- Furniture

Supply and demand in the rental market

Laboratories



Summary

Research on the state of the housing rental market. The data needed comes from 2 sources: on the one hand, from all available information on rental prices based on new rental contracts, which are registered by Incasòl (authority in charge of the rental deposits); on the other hand, information on offer and demand provided by major rental market agencies.

The goal is to establish a correlation between average prices and volumes for all rental housing typologies in Barcelona: full apartments, private rooms in shared apartments, long-term rental contracts, seasonal contracts, etc, and provide accessible information to the citizen in order to improve its understanding of the rental housing market.



Supply and demand in the rental market

The information about rental ads contained in real estate portals is very often biased: it includes a large amount of ads that stay online for long periods because they are not requested

Laboratories

Comparison of the total amount of ads in real estate portals for Barcelona area and the ones that only last for 25 days.
Period: May-June 2017

Total Ads on real estate portals

Ads < 25 days

Incasòl deposits (2nd trim.2017)

Offers volume

Total nr.	14,915	2,611	-
% over total	100 %	17.5 %	-

Offers avg price

median €/month	1,300	990	846
Median €/m2	16.5	14.61	13.10

Source: O-HB

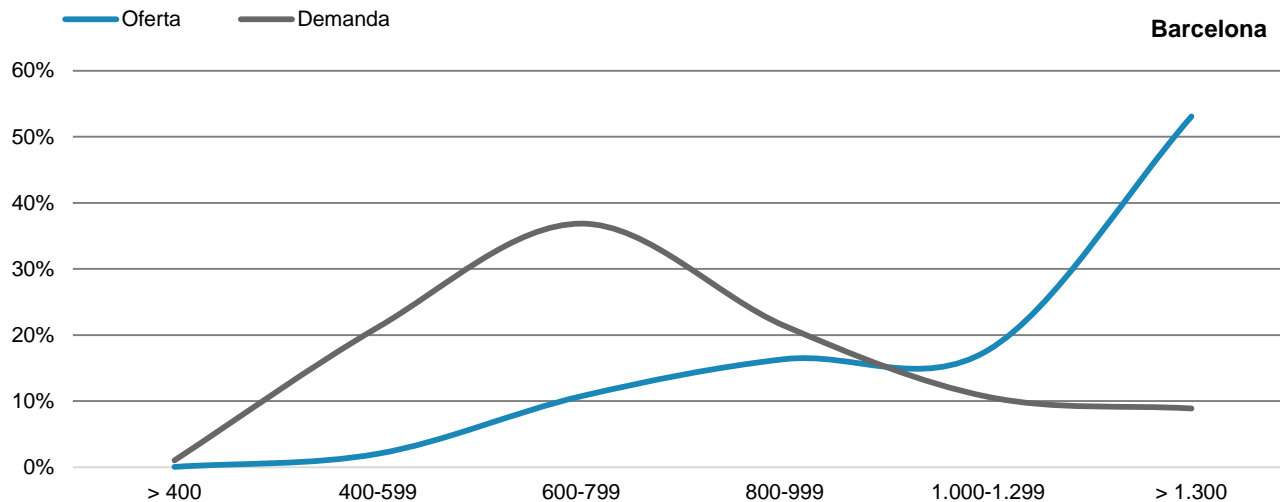


Supply and demand in the rental market

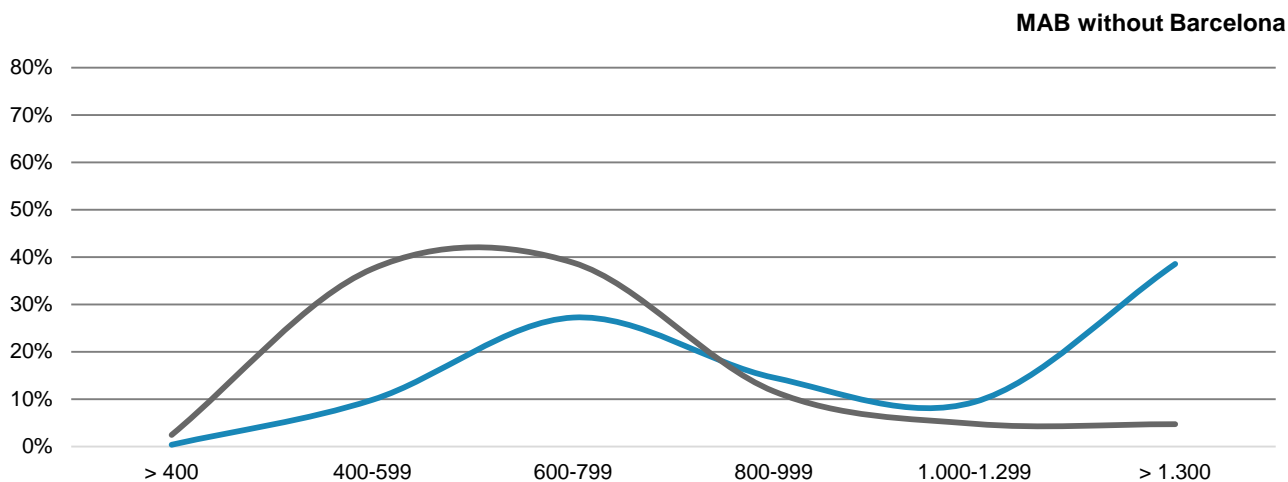
There is very little correspondence in the rent price distribution: demand shows a shift to higher prices compared to offer prices

Laboratories

Offer and demand percentage. 2016



Barcelona

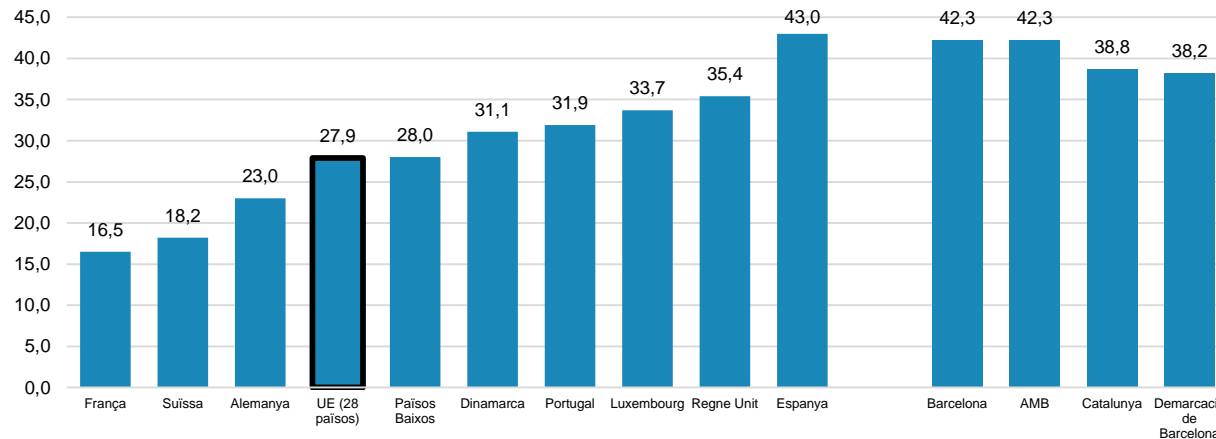


MAB without Barcelona

Source: O-HB

Housing overburden

Overburden rate* of household expenses for rental units. (% population). Territorial and European areas. 2016



Source: Idescat i IERMB: Enquesta de condicions de vida i hàbits de la població de Catalunya, 2011. INE i Idescat: Enquesta de condicions de vida, 2016

Summary

EU-SILC-based analysis on housing cost and housing overburden indicators from a European perspective, with special attention to vulnerable society groups.





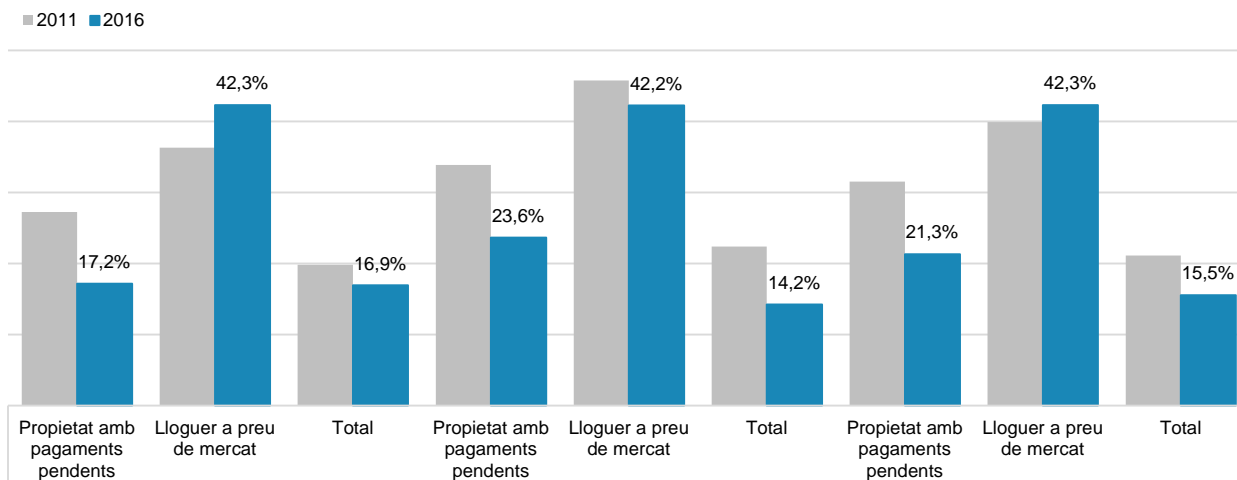
Housing overburden

16% of the inhabitants in the MAB live in household units for which they pay more than 40% of their income

Overburden rate is very much linked to the type of ownership, since this is at the same time linked with the income rate

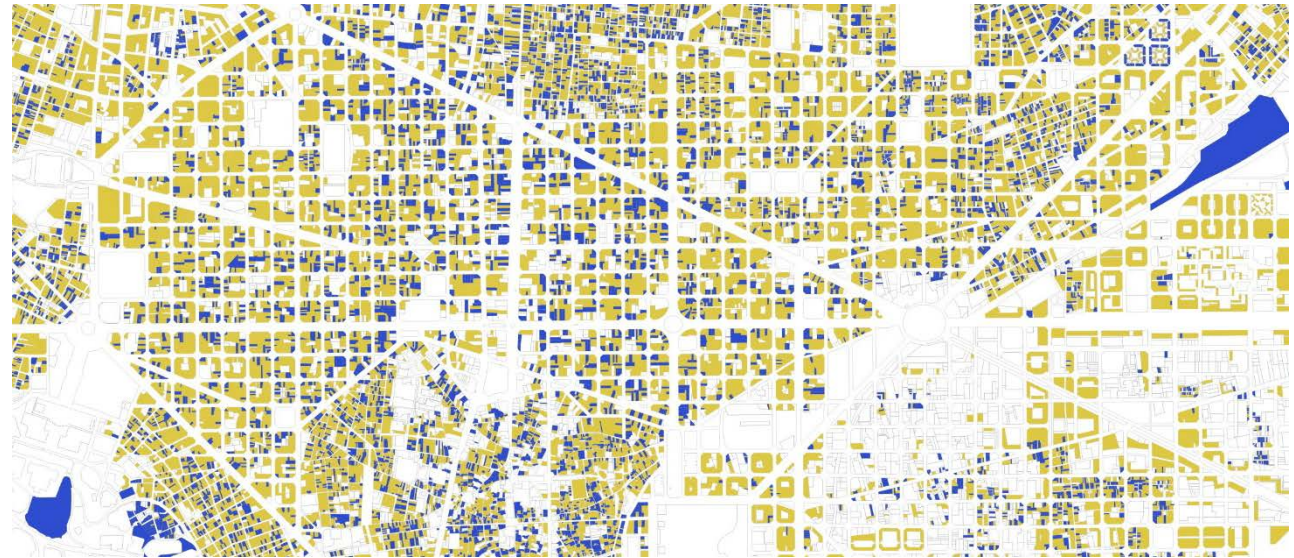
We need to be aware of the fact that overburden rate in case of rent is one of the highest in Europe (40% of population older than 16, both for Barcelona and for MAB)

Overburden rate* according to home ownership type (includes depreciation and taxes in case of purchase). (% population). Territorial areas, 2011-2016



Source: Idescat i IERMB: Enquesta de condicions de vida i hàbits de la població de Catalunya, 2011. INE i Idescat: Enquesta de condicions de vida, 2016

Home ownership structure and concentration



Summary

Evaluation of the house property concentration based on the analysis of the existing housing stock; this refers both to its evolution and to its territorial distribution. O-HB also works with taxpayers data on analyzing the current ownership structure and the distribution of housing contributors.

Home ownership structure and concentration

One of the main results of the study is that 85% of the housing in Barcelona is owned by individuals, vs. a 12% of corporate and that most of this individuals just own 1 apartment, and a 1,5% of public entities.

The 1.087 contributors (0'2% of the total tax payers in the city) that have the most apartments have 10% of the house stock.

Legal entities are the top leading ones in this group with 53.6 % of the housing stock units.

Laboratories

	Tax payers		Apartments		Median of apartments per tax payer
	Number	%total	Number	%total	
Public entities	87	0,0%	12.018	1,6%	138,1
Non public entities:	512.091	100,0%	762.172	98,4%	1,5
Individuals	497.345	97,1%	655.300	84,6%	1,3
Legal entities	13.507	2,6%	82.838	10,7%	6,1
Nonprofit entities	414	0,1%	2.652	0,3%	6,4
Religious entities	159	0,0%	1.192	0,2%	7,5
residents' association	602	0,1%	3.140	0,4%	5,2
Others	64	0,0%	468	0,1%	7,3
Total	512.178	100%	774.190	100%	1,5

	Tax payers		Apartments		Median of apartments per tax payer
	Number	%total	Number	%total	
Public entities	11	1,0%	11.868	15,7%	1078,9
Non public entities:	1.076	99,0%	63.899	84,3%	59,4
Individuals	477	43,9%	20.142	26,6%	42,2
Legal entities	547	50,3%	40.618	53,6%	74,3
Nonprofit entities	16	1,5%	1.391	1,8%	86,9
Religious entities	9	0,8%	672	0,9%	74,7
residents' association	25	2,3%	922	1,2%	36,9
Others	2	0,2%	154	0,2%	77,0
Total	1.087	100%	75.767	100%	69,7
%/total Barcelona	0,2%		9,8%		

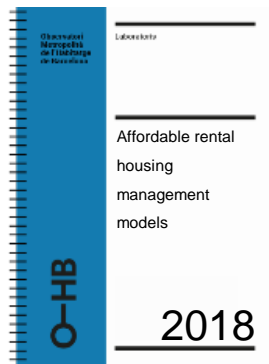
Affordable rental housing management models



Summary

Benchmarking on local and international experiences in affordable rental housing management models. Assessment of their implementation for future developers to enlarge and consolidate an affordable housing stock.

O-HB is launching a questionnaire to obtain specific information about the management of rental housing from the point of view of the viability and applicability of new management models, both locally and internationally.



Affordable rental housing management models

Survey goals:

- know in detail other experiences, mainly from countries with a large tradition in the management of affordable housing for rent.
- evaluate which would be the most appropriate models to implement to the context of the Metropolitan Area of Barcelona

Laboratories

4. ADJUDICACIÓ DELS HABITATGES I ROTACIÓ DELS INQUILINS

4.1 Col·lectius atesos:

	<u>Percentatge</u>
<input type="checkbox"/> Població general%
<input type="checkbox"/> Joves%
<input type="checkbox"/> Persones grans%
<input type="checkbox"/> Col·lectius amb especials dificultats%
<input type="checkbox"/> Altres: <input type="text"/>%

Observacions:

4.2 Sistemes d'adjudicació dels habitatges:

- Registres de sol·licitants públics
- Adjudicació lliure
- Miseses d'emergències
- Altres:

Observacions:

4.3 Valoració dels sistemes d'adjudicació. Avantatges i inconvenients.

4.4 Sistemes de rotació dels inquilins:

	<u>Percentatge</u>
<input type="checkbox"/> Regulació pública%
<input type="checkbox"/> Aplicació durades de la Llei d'Arrendaments Urbans%
<input type="checkbox"/> Fórmules mixtes%
<input type="checkbox"/> Fórmules de rotació de lloguers en funció de l'activitat dels inquilins de la bar.%

5. GESTIÓ DELS HABITATGES

5.1 Contractes:

Durada:

Duració mitja dels contractes?

Comentaris respecte la duració de les relacions contractuals.

Establiment preu:

Criteri de fixació de preus

- Percentatge basat en la capacitat econòmica de la unitat de convivència. Quins percentatges són?%
Comentaris (Qui estableix els %, com s'apliquen, llei marc...)
- Preu per m², amb independència de la capacitat econòmica. Preu màxim:%
Preu mínim:
- Altres:

Observacions:

Fiances i garanties de compliment.

Existeix obligació de prestar garantia quan s'accedeix al recurs d'habitatge.

- Sí
- No

(Forma i quantia de la garantia)

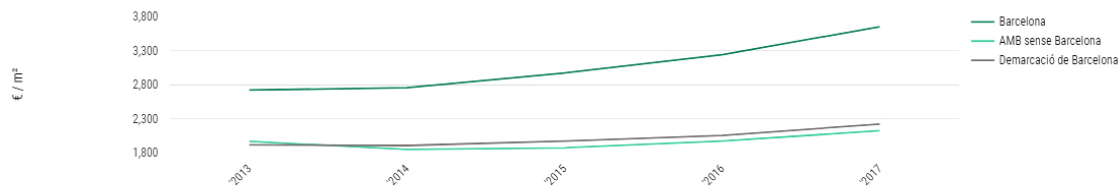
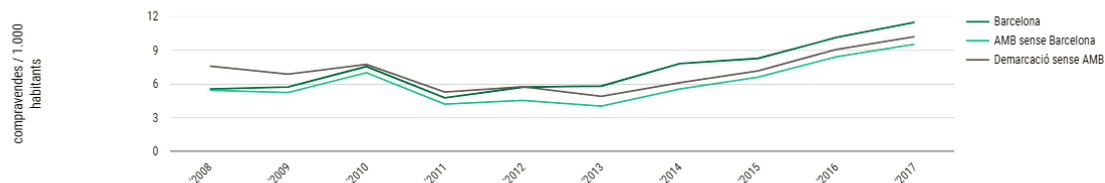
Chapters of the survey

0. Structure and dependency of the entity
1. Promotion and other strategies to obtain housing units
2. Land acquisition
3. Financing of the entity
4. Housing adjudication and tenant shifting
5. Housing stock management
6. Dwellings maintenance
7. Most significant problems

Housing sales transaction through property register

Laboratories

Compravendes d'habitatge lliure per 1.000 habitants. 2008-2017 (1r trim.)

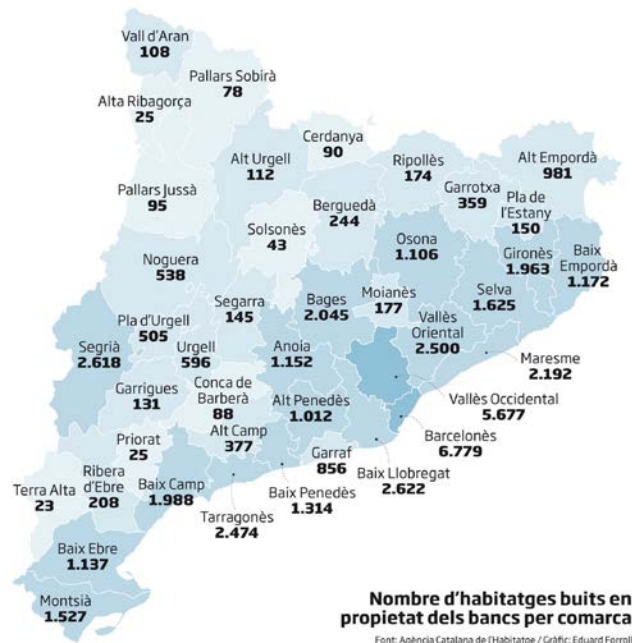


Summary

This study aims to improve the comprehension of the purchase-sale transactions from the last years. Besides, it foresees the generation of an average purchase-sale transaction index according to different and comparable housing typologies.



From empty housing to social housing



Summary

Research on major methodologies implemented in Catalonia to detect empty housing units. Its goal is to establish a consensual methodology and a cost estimation for each case.



Ageing and habitability in the MAB



Summary

Diagnosis generation about elderly people and housing, and about general housing access problems, based on the actual situation and on estimated projections (2030). Elaboration of a catalogue that describes experiences related to this topic.

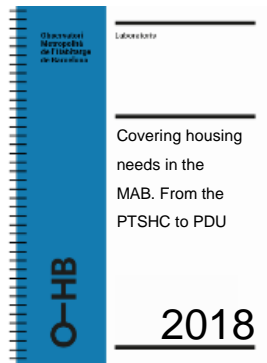


Covering housing needs in the MAB. From the PTSHC to PDU



Summary

Development of a model for housing necessities coverage based on both the MAB- and specific municipal scale. This takes the Territorial and Sectorial Housing Plan of Catalonia (PTSHC) into consideration. The research objective is to serve as a guide for the Urban Director Plan in the MAB (PDU), currently on drafting process.

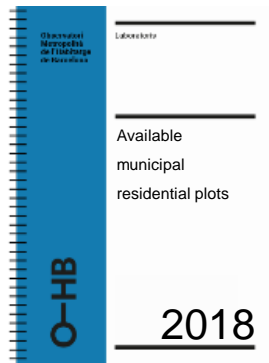


Available municipal residential plots

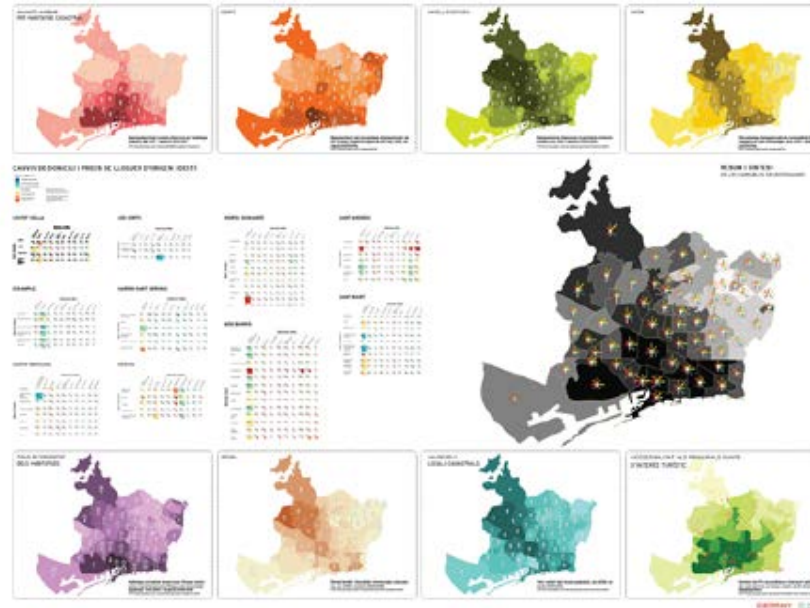


Summary

Analysis of the available municipal residential plots in the MAB. The main goal of this laboratory is to quantify the potential for new housing units.



Gentrification

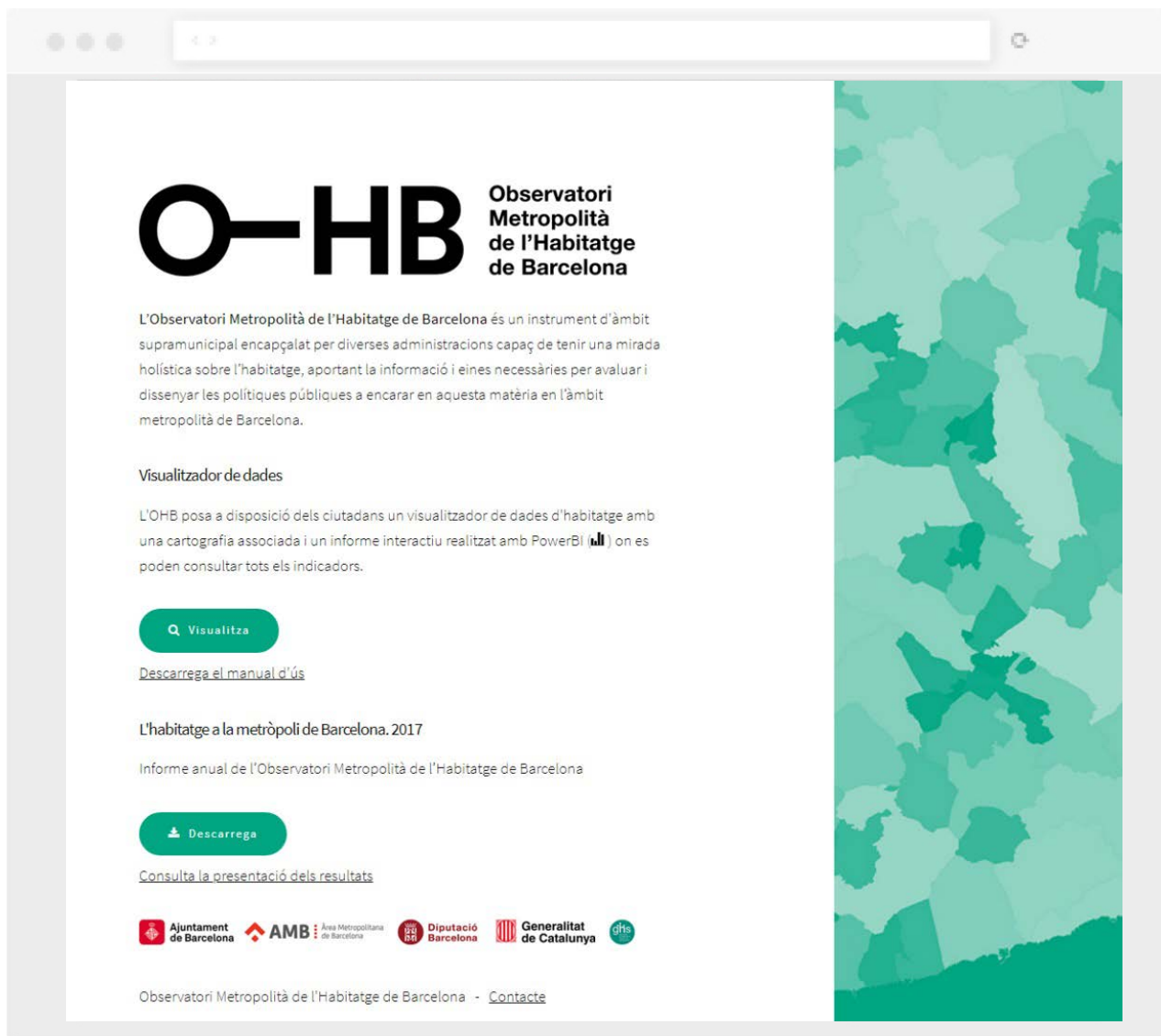


Summary

OHB is collaborating with the Barcelona City Council to collect information and knowledge on methodologies already being used elsewhere for the development of a methodology to make a diagnosis of gentrification in Barcelona.

WEBSITE


www.ohb.cat



O-HB Observatori Metropolità de l'Habitatge de Barcelona

L'Observatori Metropolità de l'Habitatge de Barcelona és un instrument d'àmbit supramunicipal encapçalat per diverses administracions capaç de tenir una mirada holística sobre l'habitatge, aportant la informació i eines necessàries per avaluar i dissenyar les polítiques públiques a encarar en aquesta matèria en l'àmbit metropolità de Barcelona.

Visualitzador de dades

L'OHB posa a disposició dels ciutadans un visualitzador de dades d'habitatge amb una cartografia associada i un informe interactiu realitzat amb PowerBI  on es poden consultar tots els indicadors.

[Visualitza](#)




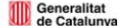

[Descarrega el manual d'ús](#)

L'habitatge a la metròpoli de Barcelona. 2017

Informe anual de l'Observatori Metropolità de l'Habitatge de Barcelona

[Descarrega](#)

[Consulta la presentació dels resultats](#)

 Ajuntament de Barcelona  AMB : Àrea Metropolitana de Barcelona  Diputació Barcelona  Generalitat de Catalunya  ghs

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