

# The housing problem in Barcelona

Anna Vergés and Alba Alsina

in collaboration with Maite Arrondo



2nd Expert Group Meeting on Indicators under SDG monitoring

October, 16th 2019

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**What is the O-HB?**

**How do we work?**

**The housing problem in  
Barcelona and its metropolitan  
area**

**Communication at O-HB**

# **What is the O-HB?**

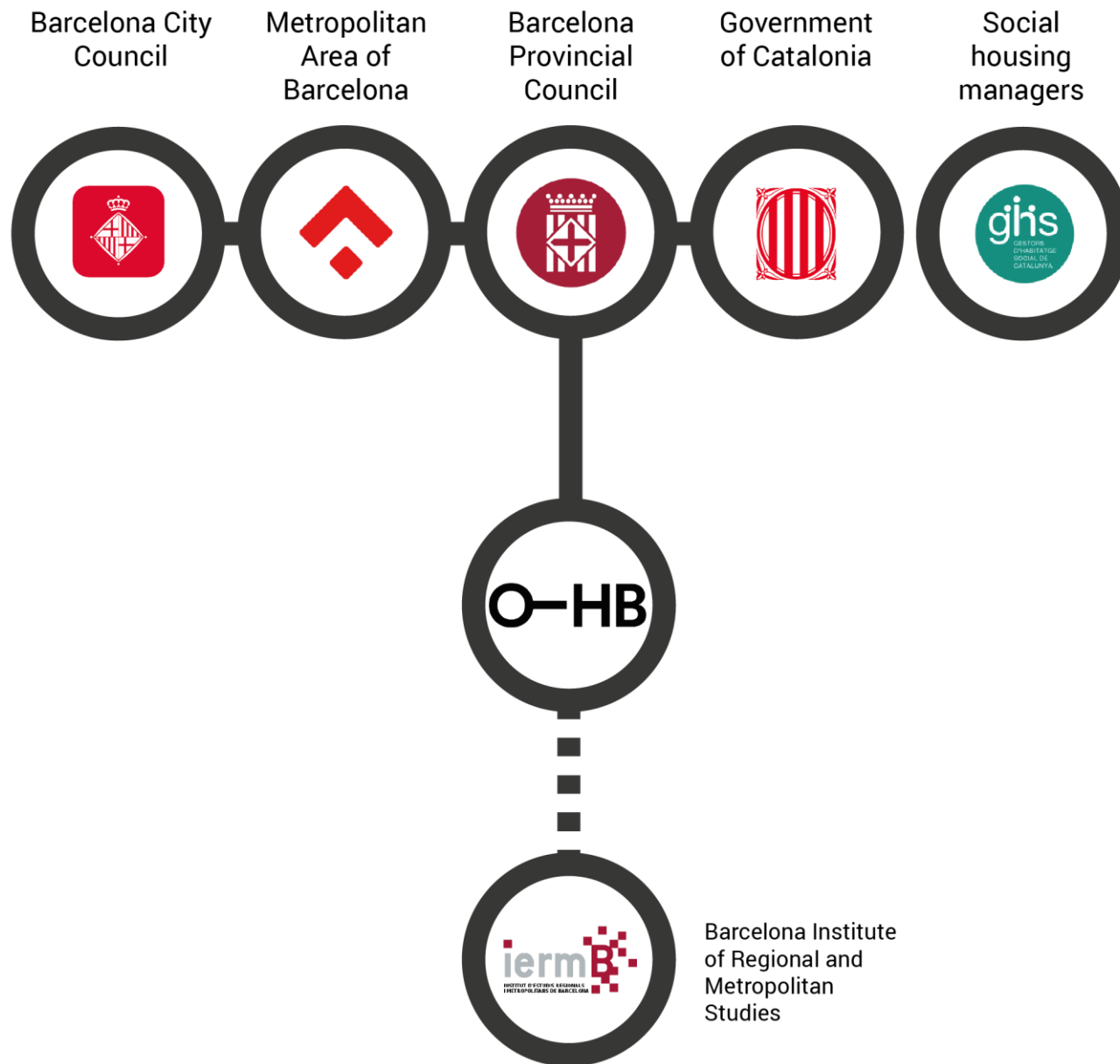
How do we work?

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## Institutional framework

The O-HB is promoted by the Barcelona City Council, the Metropolitan Area of Barcelona, the Barcelona Provincial Council and the Government of Catalonia. It also counts with the support of the Social Housing Managers Association (GHS).



## Objectives

### Main goals



- To support the definition of more effective **public policies** for housing



- To provide **information to the general 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



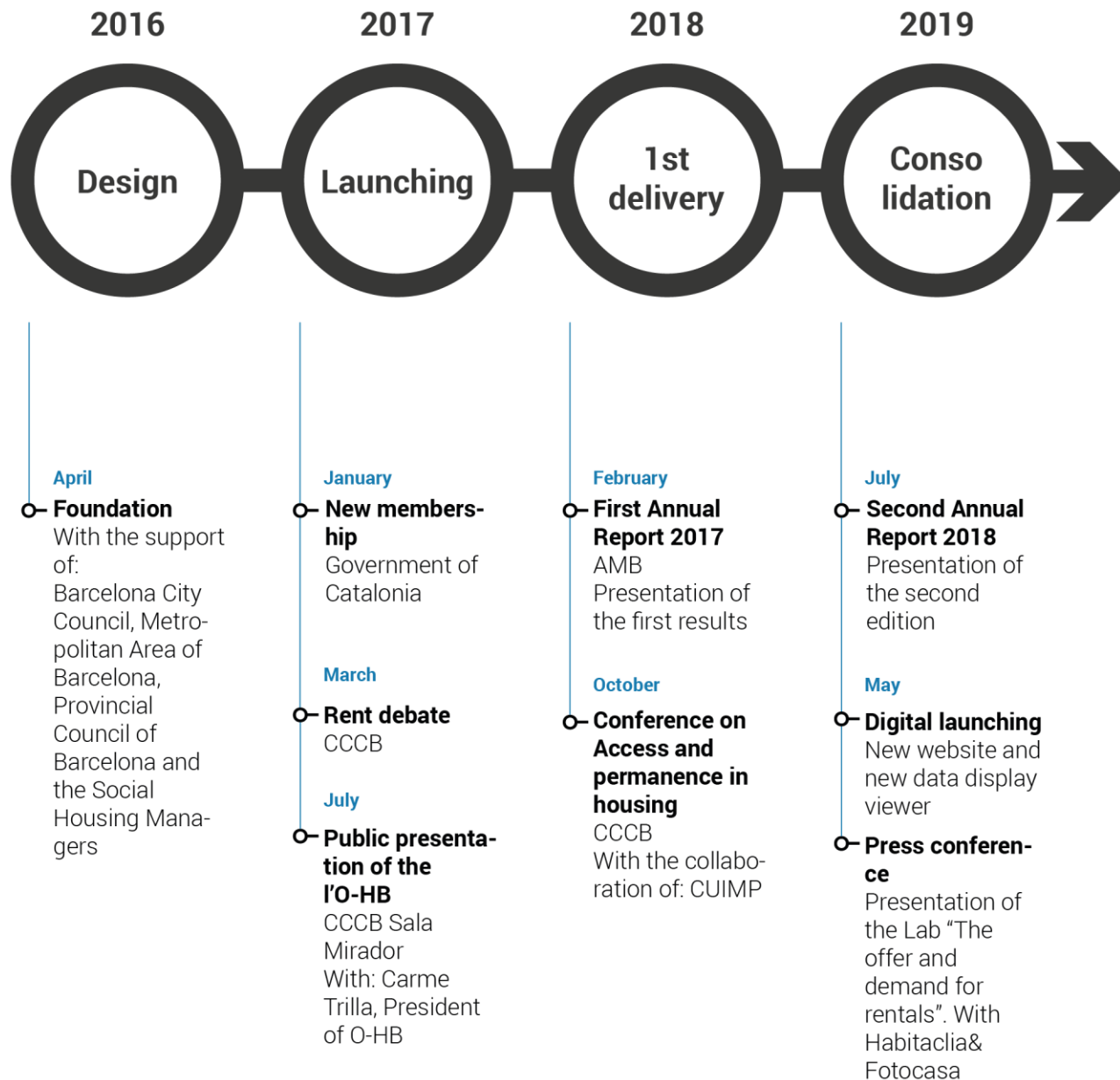
- **Fill existing data gaps** through laboratories

### Structural objectives

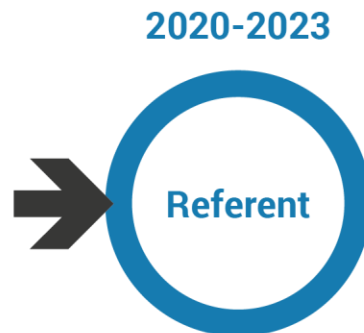


- **Share knowledge and projects** developed with the different agencies of the administrations and organizations involved

## Precedents



## Strategy 2020-2030



### Innovation

- New questions
- New methodologies
- Improve visualization
- Improve database architecture

### Coordination

- Stronger coordination between different administrations and departments
- Expand and reinforce the network of actors and collaborators

### Internationalization

- Share spaces of knowledge
- Participation in calls for international projects
- Website update in 3 languages

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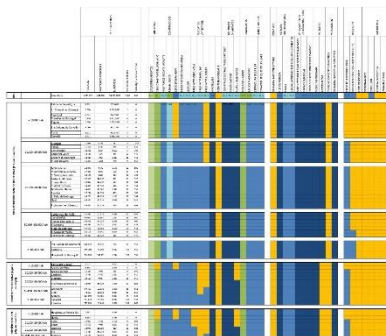
Communication at O-HB




## Housing data

- Social and demographical features
- The housing stock
- Building and rehabilitation
- The housing market
- Access and permanence problems
- Housing policies


### Available data



  
Sistema  
d'indicators

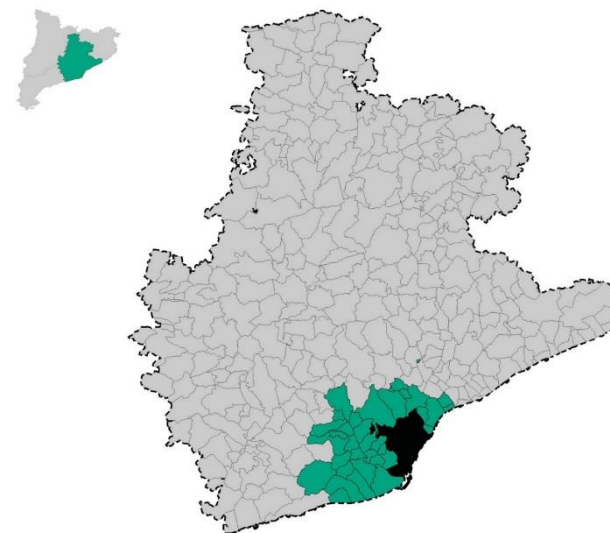
  
Informe  
anual



  
Labs  
(laboratoris)

### Data gaps

### Geographical scope



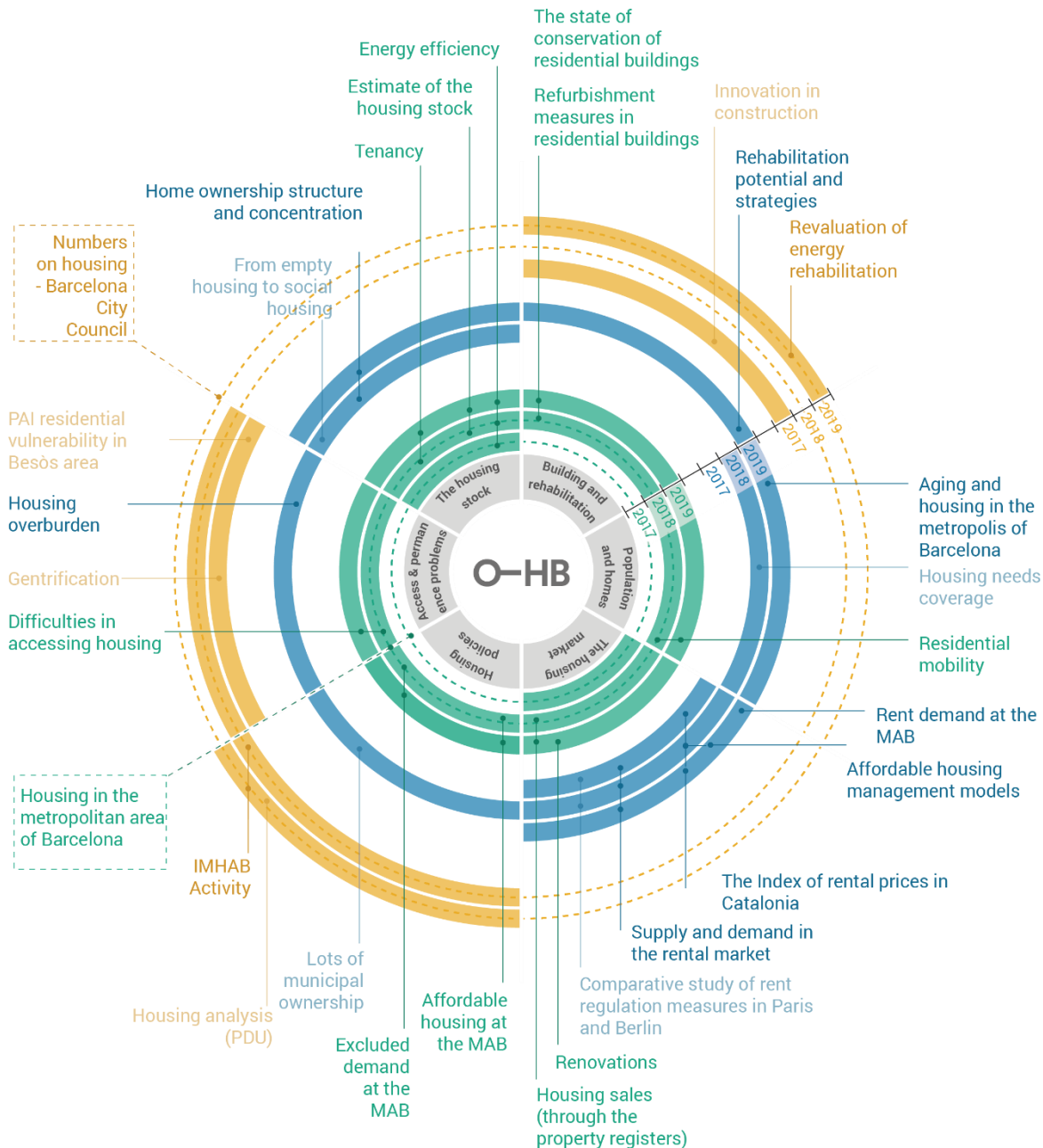
- Province of Barcelona
- Metropolitan Area of Barcelona
- Barcelona

# O-HB Galaxy

The galaxy explains the tasks that O-HB develops around 6 strategic themes:

- People and homes
- Housing market
- Problems of access and permanence
- Housing policies
- Housing park
- Construction and rehabilitation.

Each one works with different data sources to generate specific indicators and develops innovative laboratories and collaborations with other entities.



Legend

2019 before 2019

Collaborations

Laboratories

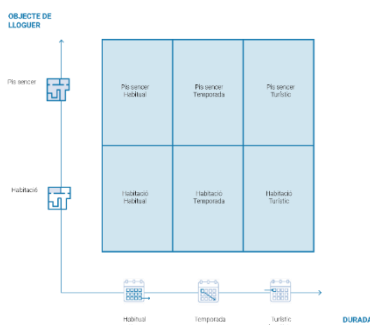
Indicator system

Themes

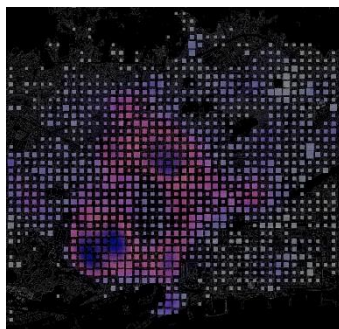
----- Studies that refer to all themes

# O-HB laboratories developed in 2019

## Supply and demand for rents in Barcelona and its metropolitan area



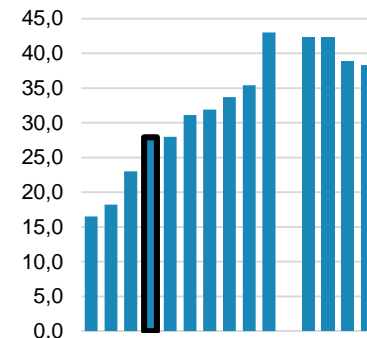
## Home ownership structure and concentration



## Comparative study on rent regulation in Paris and Berlin

	Berlin	Paris
Name of the measure	Mietpreisbremse "rental price brake"	Encadrement des loyers "rent limit"
Reference rent	Municipal "Berl. m. p. r."	Loyer de référence "Berl. référence"
implemented since	1st June 2016	1st August 2015
Max. limit for new contracts	10% above reference price	20% above reference price (30% max.)
Type of contract	New contracts (the existing are already regulated)	New contracts (the existing are already regulated)
Updates	every 2 years	yearly
Rehabilitation 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

## Housing cost overburden rate



## IMHAB activity



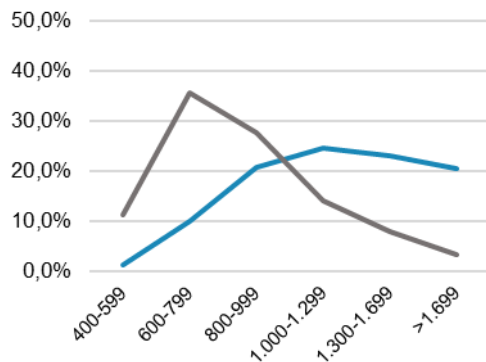
## Potential and rehabilitation strategies



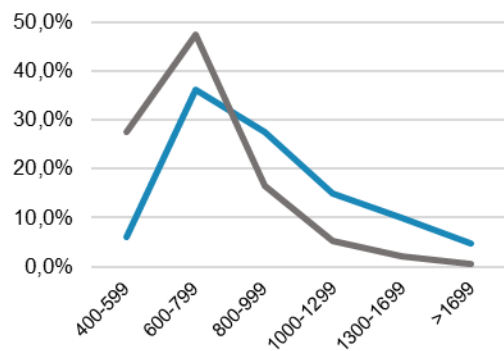
## Supply and demand for rents in Barcelona and its metropolitan area

Supply and demand percentage. March 2017- March 2018

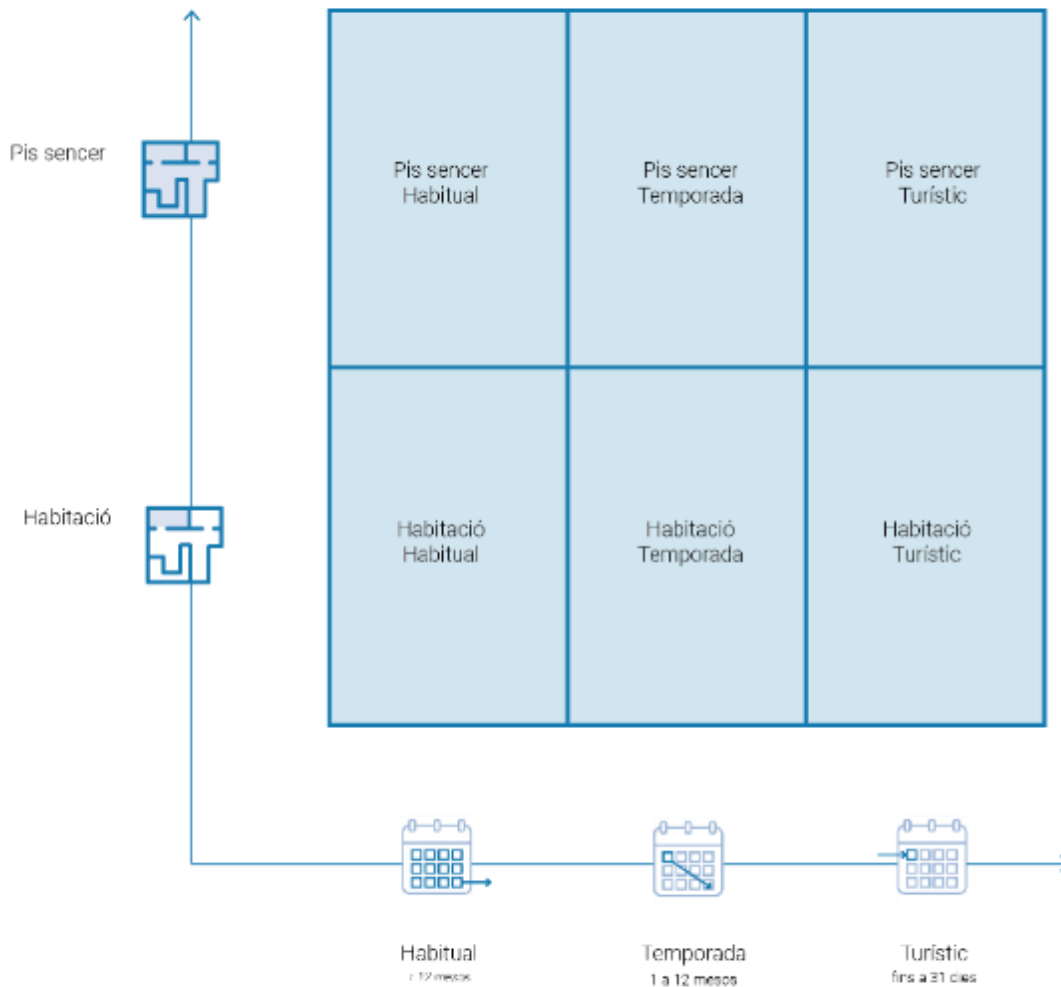
### Barcelona



### MAB without Barcelona



### OBJECTE DE LLOGUER



DURADA



## Home ownership structure and concentration

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 taxpayer's data on analysing the current ownership structure and the distribution of housing contributors

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

■ Legal entities

■ Individuals



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## Slight increase of the population due to the recovery of international migrations

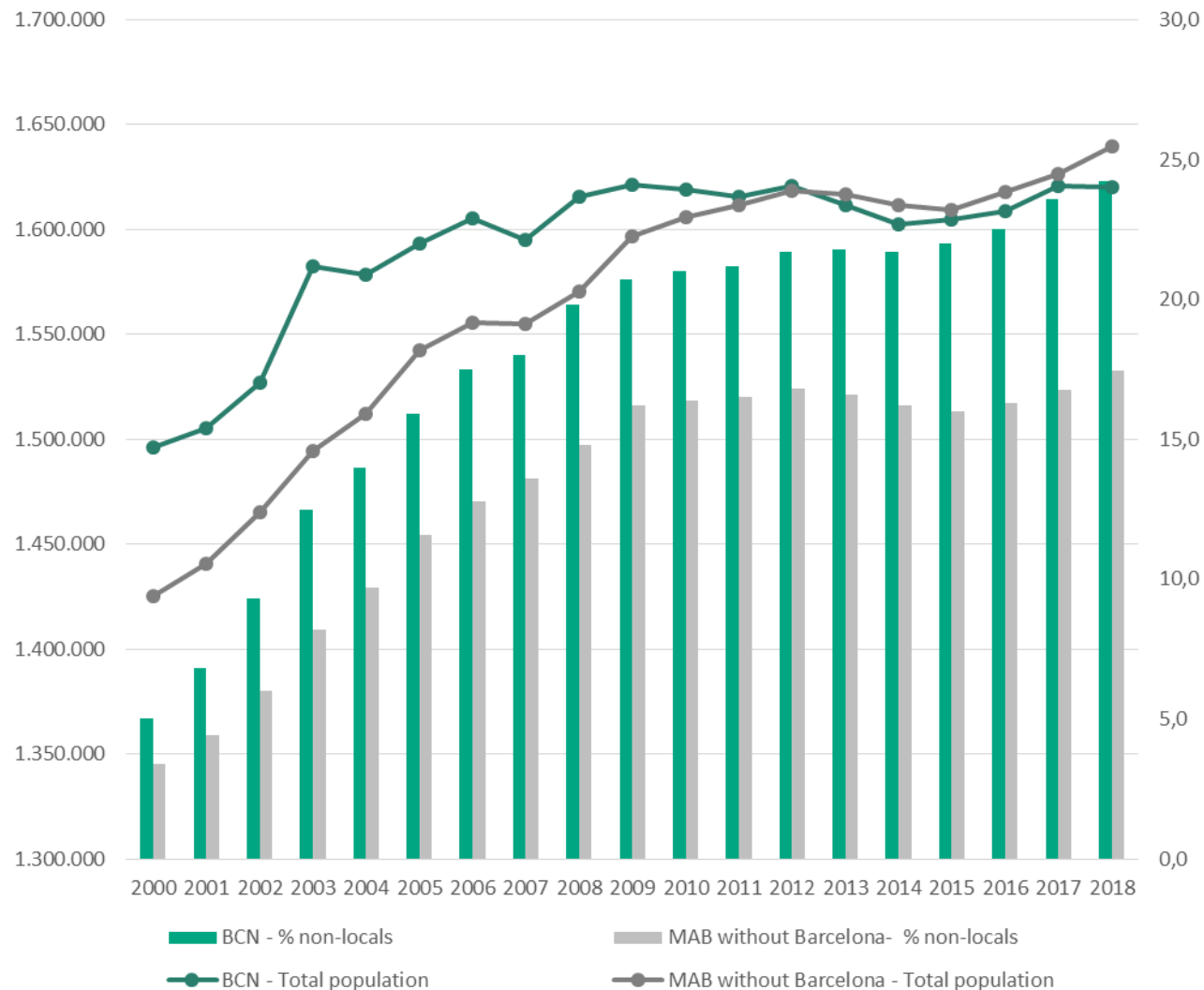
### Barcelona Population 2018

- Total: 1.620.343
- Immigrants: 392.743
- % immigrants/locals: 24,2%

### MAB without Barcelona Population 2018

- Total: 1.639.925 (+1,1%)
- Immigrants: 286.357
- % immigrants/locals: 17,4%

Population and weight of the population born abroad. 2000-2018



Source: INE, padró continu de població

## Less young and more elderly

### Young population (16 to 29 year-old)

- **1996:** 22,8%
- **2006:** 18,6%
- **2018:** 14,6%

### More elderly, a quarter living alone, mainly women

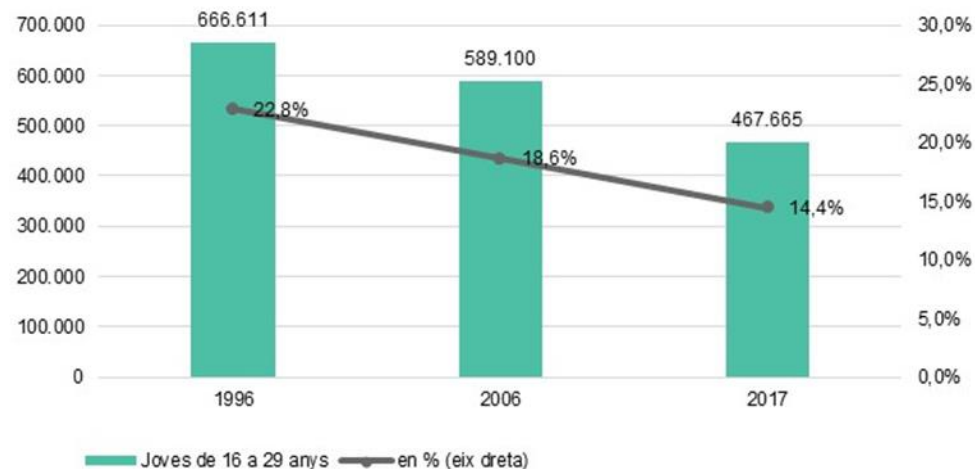
#### MAB:

- **1996:** 16,4%
- **2006:** 17,5%
- **2018:** 19,7%

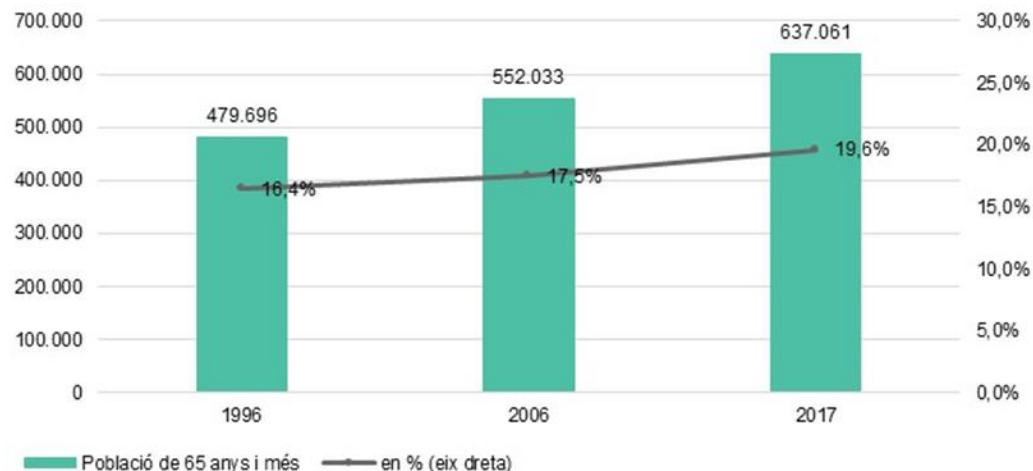
### In Barcelona, the numbers for the 65 year-old and older population in 2018 are as follows:

- 25,8 % live alone
- 76,3 % of those living alone are women

16 to 29 age population. Metropolitan area of Barcelona. 1996, 2006 and 2018.



65 year-old and older population. Metropolitan Area of Barcelona. 1996, 2006 and 2018.



Source: Idescat, Estadística de població, 1996; Padró continu de població 2006 i 2018



## A metropolis where the vast majority of the population changes housing within their municipality

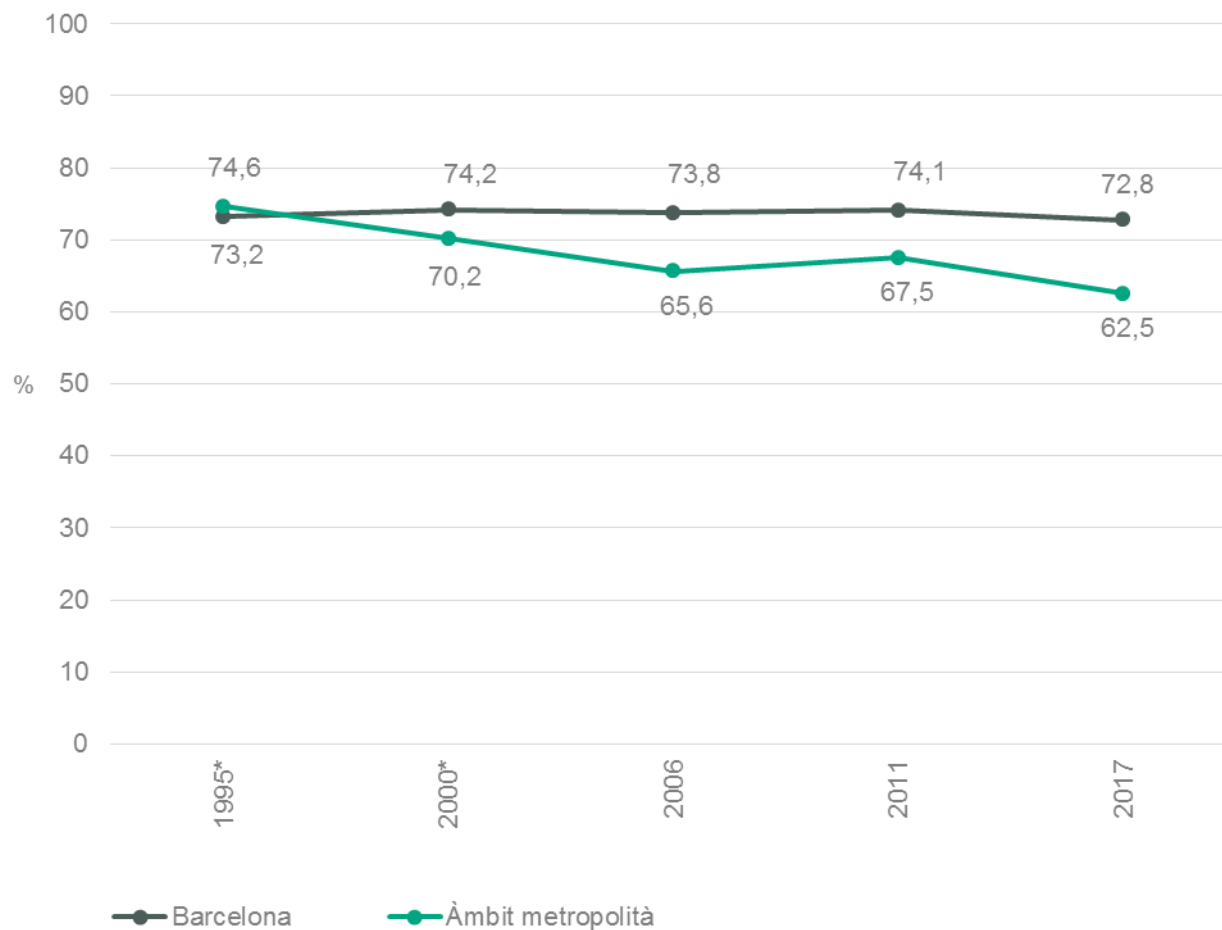
### MAB:

There is a decline in the capacity of the municipalities to contain their residents.

### Barcelona:

The restraint rate of the municipality of Barcelona is much higher than the average.

Municipal residential restraint rate. 16 year-old population and older. 1995-2017.



Source: IERMB, Enquesta de condicions de vida i hàbits de la població, 1995 i 2000; Idescat i IERMB, Enquesta de condicions de vida i hàbits de la població, 2006 i 2011, Enquesta de cohesió urbana, 2017

## The estimate of the housing stock: fewer housing and less empty units than indicated by the census

The 2011 census figures are overestimated.

### MAB:

- Census: 1.501.756 housing units
- Estimate O-HB: 1.432.530 (year 2018).

### Barcelona:

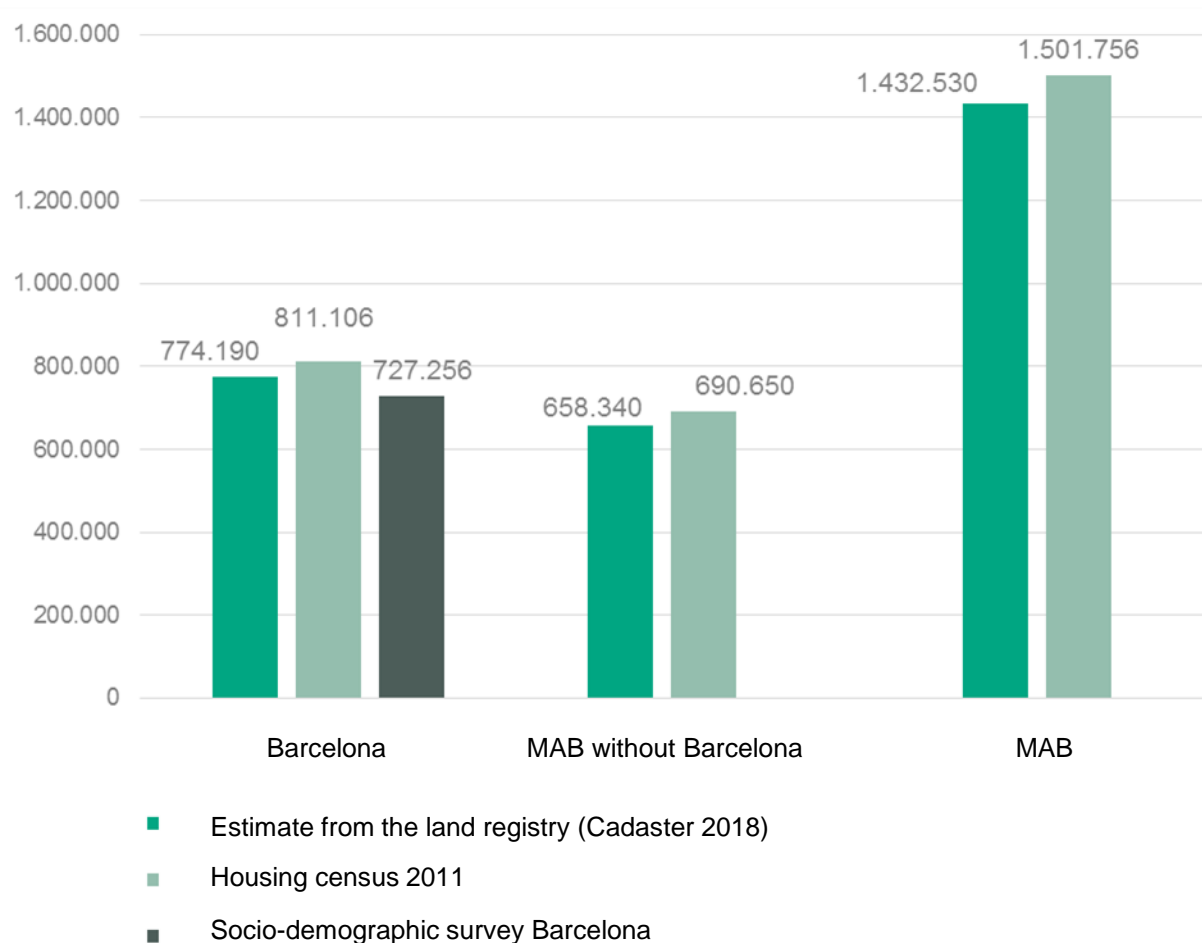
- Census: 811.106 housing units
- Estimate O-HB: 774.190 (year 2018).

The excess of housing units recorded in the 2011 Census has led to systematic errors in the determination of the percentage of empty units.

In Barcelona,

- Census: 88.259 housing units (10,88% of the stock)
- Different studies carried out by the Barcelona City Council detect 10.052 housing units (1,22% of the stock)

Estimate of the housing stock from various sources.



Source: Elaboració pròpia a partir del Cadastre; INE, Cens de població i habitatges 2011; Ajuntament de Barcelona, Enquesta Sociodemogràfica de Barcelona 2017

## An atomized housing stock property structure, predominantly individuals

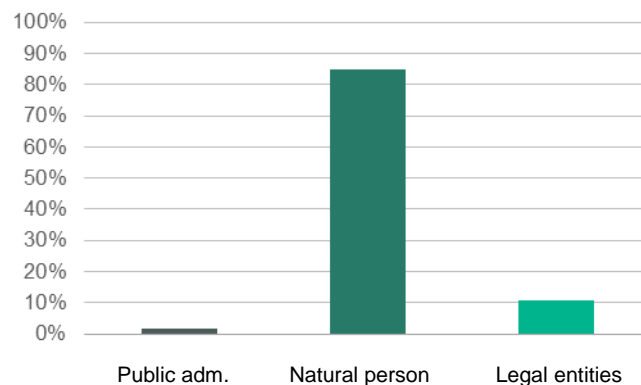
A total of 774.190 housing units belong to 512.178 taxpayers. On average, Barcelona taxpayers have 1,5 housing units.

- Most taxpayers in the city are natural persons: 97,1%, who hold 84,6% of the stock.
- The legal entities are 2.6% of the taxpayers and hold 10.7% of the stock.
- Public administrations are taxpayers of 12,018 units, 1.6% of the stock.

Type of taxpayer and number of housing units in Barcelona. 2018

	Taxpayers		Housing units		Avg. housing units / taxpayer
	Nº	% total	Nº	% total	
Public administrations	87	0,0%	12.018	1,6%	138,1
Natural person	497.345	97,1%	655.300	84,6%	1,3
Legal entities	13.507	2,6%	82.838	10,7%	6,1
Non-profit organizations	414	0,1%	2.652	0,3%	6,4
Religious institutions	159	0,0%	1.192	0,2%	7,5
Communities of property / owners	602	0,1%	3.140	0,4%	5,2
Other	64	0,0%	468	0,1%	7,3
No data			16.582	2,1%	
<b>Total</b>	<b>512.178</b>	<b>100,0%</b>	<b>774.190</b>	<b>100,0%</b>	<b>1,5</b>

Percentage of housing units according to taxpayer type. 2018



Source: Elaboració pròpia a partir de les dades de l'Ajuntament de Barcelona i la Direcció General del Cadastre

## Main taxpayers: predominance of legal entities

The analysis of the last decile shows the following results:

- Legal entities configure 50.3% and have 53,6 % of the 75.767 housing units of this decile

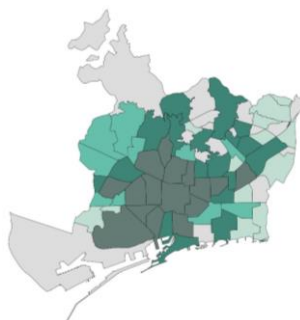
- Natural person are 43,9% and they have 27% of the housing units in this decile

- Public administrations are 1% of the total and have 15,7% of the housing units in this decile

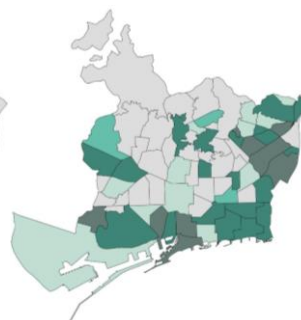
Taxpayer type and number housing units from the main taxpayers (decile 90). 2018

	Contribuents		Habitatges		Mitjana d'habitatges per contribuent
	Nombre	%total	Nombre	%total	
Administracions públiques	11	1,0%	11.868	15,7%	1.078,9
Persones físiques	477	43,9%	20.142	26,6%	42,2
Persones jurídiques	547	50,3%	40.618	53,6%	74,3
Entitats sense ànim de lucre	16	1,5%	1.391	1,8%	86,9
Institucions religioses	9	0,8%	672	0,9%	74,7
Comunitats de béns/propietaris	25	2,3%	922	1,2%	36,9
Altres	2	0,2%	154	0,2%	77,0
<b>TOTAL</b>	<b>1.087</b>	<b>100,0%</b>	<b>75.767</b>	<b>100,0%</b>	<b>69,7</b>
Sobre total d'habitatges de Barcelona		0,2%		9,8%	

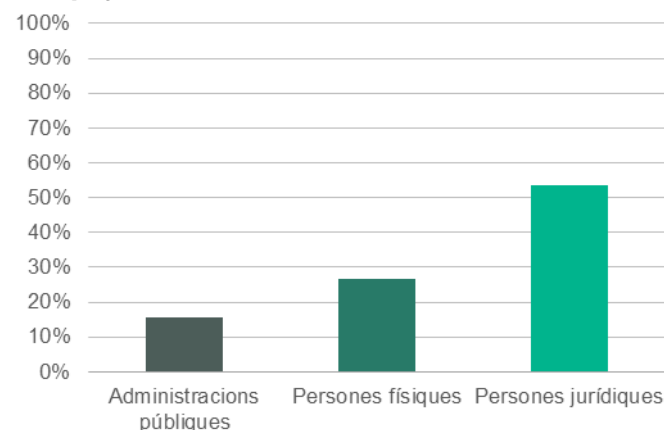
No public administrations. 2018



Public administrations. 2018



Pe% of housing units by the main taxpayers. 2018



Font: Elaboració pròpia a partir de les dades de l'Ajuntament de Barcelona i la Direcció General del Cadastre

## The increase of households that live in a rental property

### MAB:

- 1991: 28,1%
- 2001: 20,9%
- 2011: 23,5%
- 2016-17: 27,8%

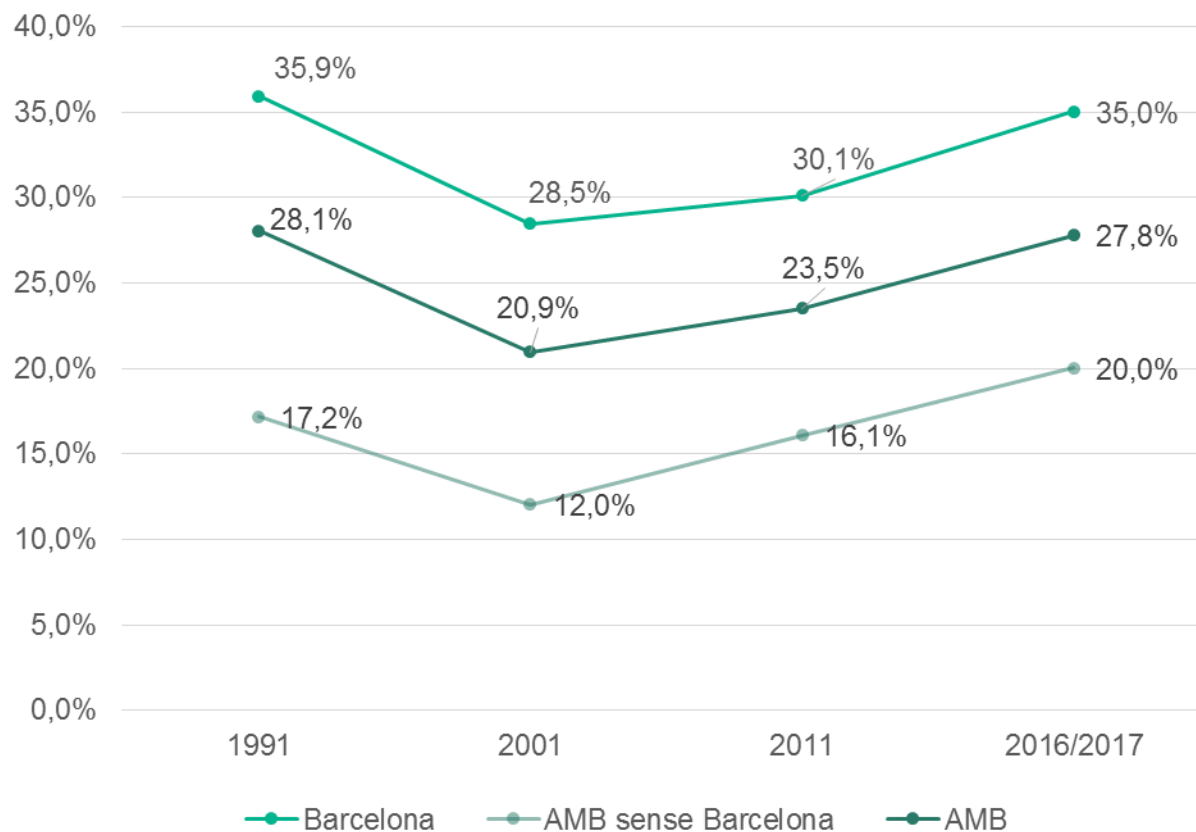
### Barcelona:

- 1991: 35,9%
- 2001: 28,5%
- 2011: 30,1%
- 2016-17: 35,0%

### MAB without Barcelona:

- 1991: 17,2%
- 2001: 12,0%
- 2011: 16,1%
- 2016-17: 20,0%

Households in a rental property (%). 1991 - 2016/2017. MAB.



Source: Idescat, Cens de població i habitatges 1991, 2001, 2011; IERMB, Estadístiques metropolitanes sobre condicions de vida, 2016/2017.

## Reestablishment of residential building construction, especially in the metropolitan area

### Barcelona:

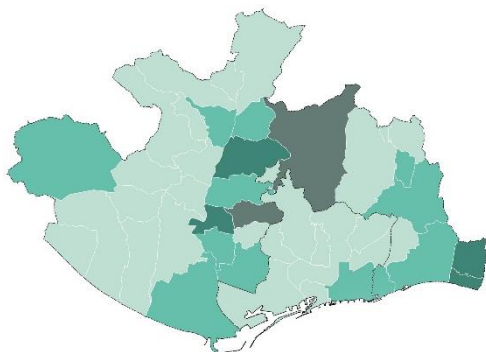
- 2.203 new housing units begun in 2018
- + 60,5% compared to 2017
- + 216,1% compared to 2013

### MAB:

- 7.119 new housing units begun in 2018
- 13,6 % compared to 2017
- 482,1% compared to 2013

### MAB without Barcelona:

- 4.916 new housing units begun in 2018
- + 0,5% compared to 2017
- + 834,6% compared to 2013



Construction of housing units commenced. 2004-2018



Source: Secretaria d'Hàbitat Urbà i Territori, a partir dels visats dels col·legis d'aparelladors, arquitectes tècnics i enginyers d'edificació de Catalunya

## The slight fall in sales and the intense increase in rental contracts in the metropolitan area of Barcelona

### MAB without Barcelona

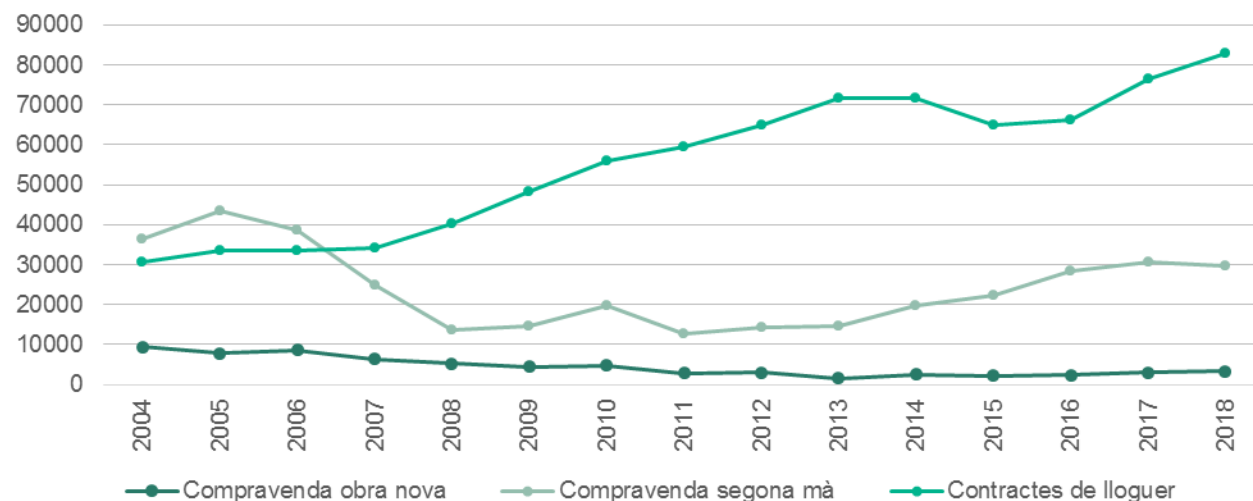
- 2006: 27,3% rent - 72,7% sales
- 2018: 62,3% rent - 37,7% sales

### MAB

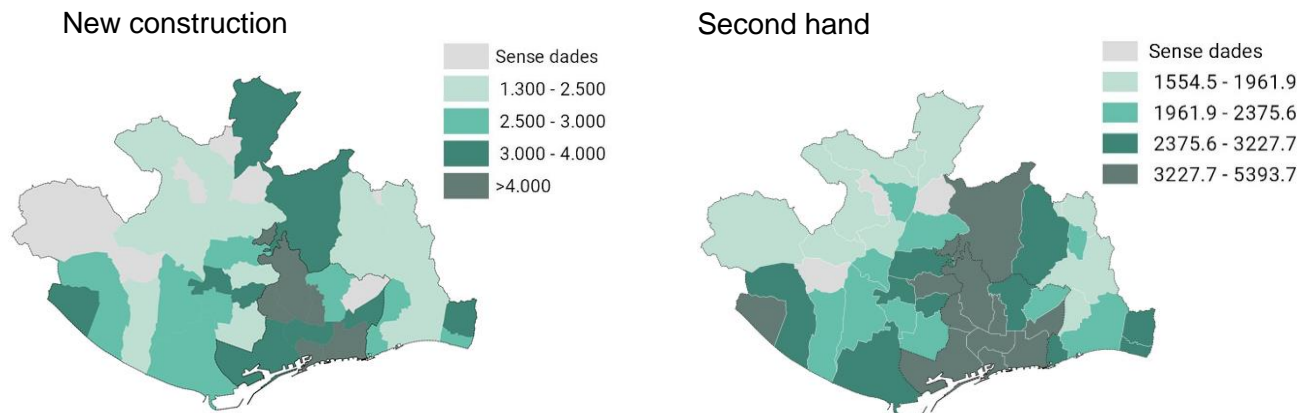
- 2006: 41,7% rent – 58,3% sales
- 2018: 71,6% rent – 28,4% sales

Parallel to this, a continuous increase in the average price of new construction and second hand housing purchase and sale

Evolution of the various segments of the market. MAB. 2004-2018



Avg. price of purchase and sale (€/m2). MAB and Barcelona districts. 2018



Source: Ministerio de Fomento, a partir del Consejo General del Notariado; Secretaria d'Hàbitat i Millora Urbana, a partir de les fiances dipositades a l'INCASÒL.

## The continued increase in the average price of rental housing

### Barcelona

- Avg. price: 929,6 €/month
- Increase 2017-18: + 6%
- Increase from the lowest point (2013): 36,4 %

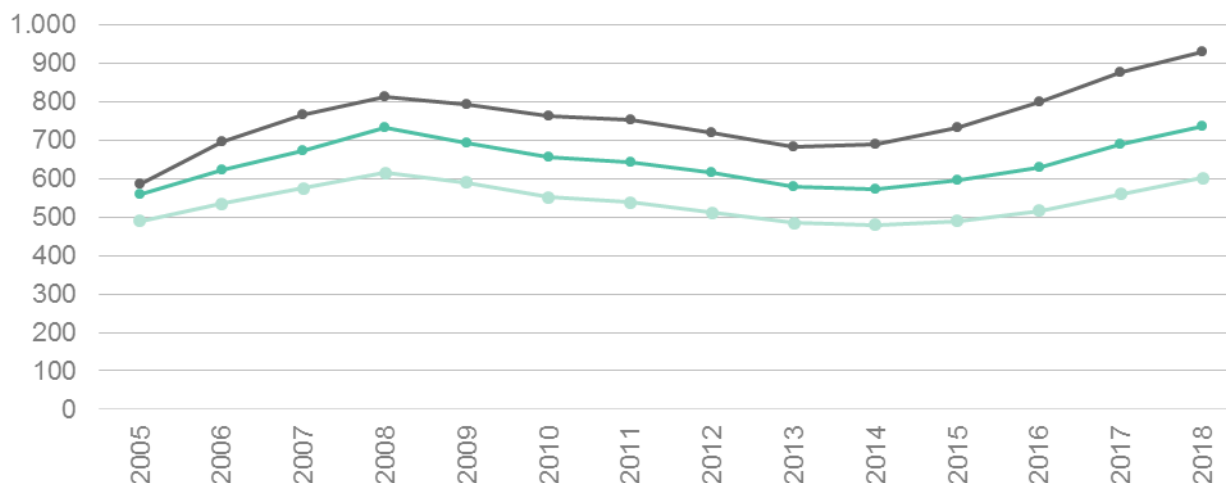
### MAB without Barcelona

- Avg. price: 735,1 €/ month
- Increase 2017-18: + 6,7%
- Increase from the lowest point (2014): 28,3%

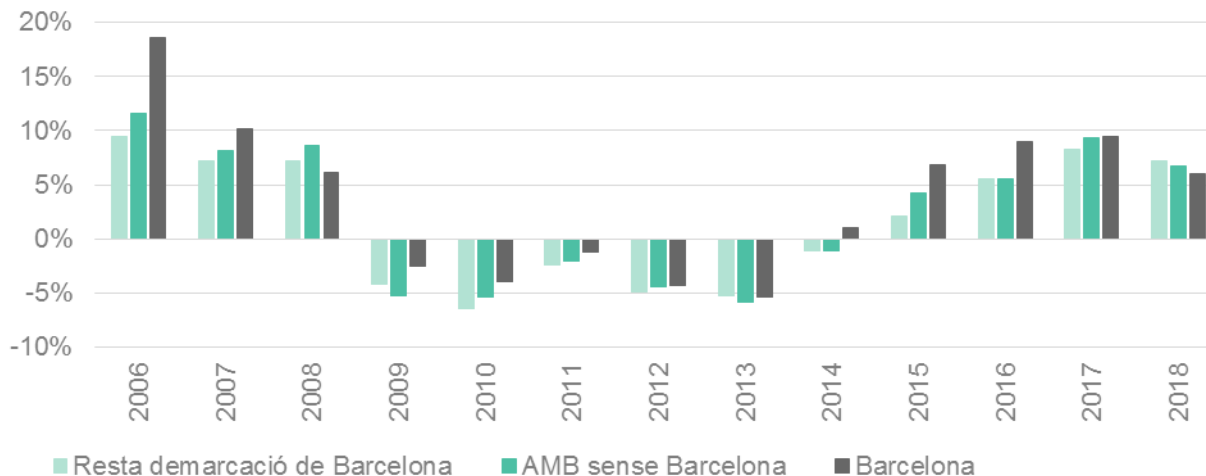
### MAB

- Avg. price : 860,5 €/ month
- Increase 2017-18: + 6%
- Increase from the lowest point (2013): 33,8%

Average rental price in housing units (€/month). 2005-2018.



Rental price variation in housing (€/month). 2006-2018.



Source: Secretaria d'Hàbitat Urbà i Territori, a partir de les fiances dipositades a l'Incasòl



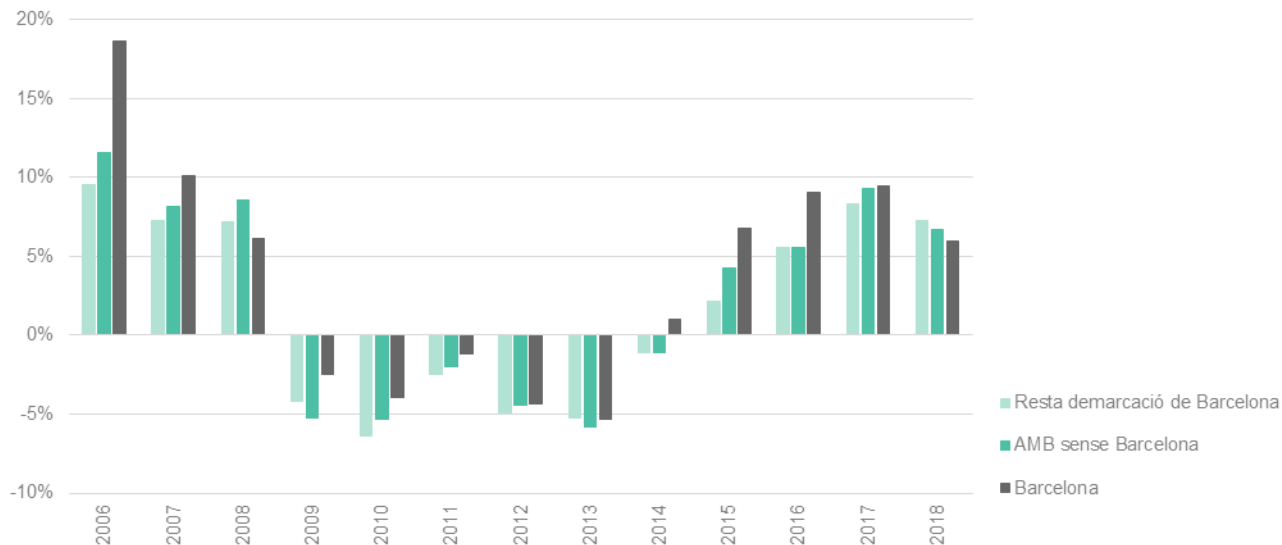
## General moderation of the increase in average rental prices

Year-on-year variation:

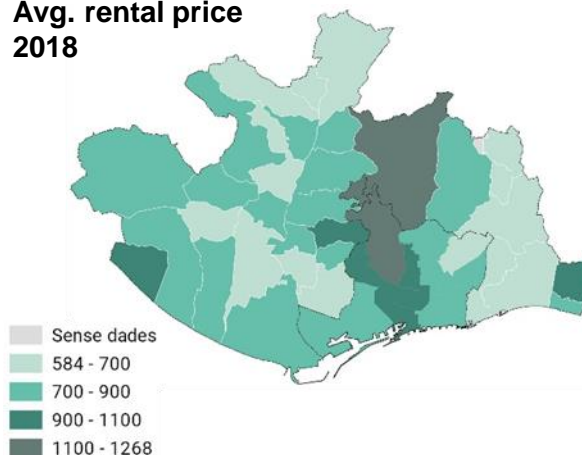
- Barcelona: 6% (lower than the one in 2017: 9,5%)
- MAB without Barcelona (lower than the one in 2017: 9,3%)

**The 2017 would have been the peak of the growth of average rental prices.**

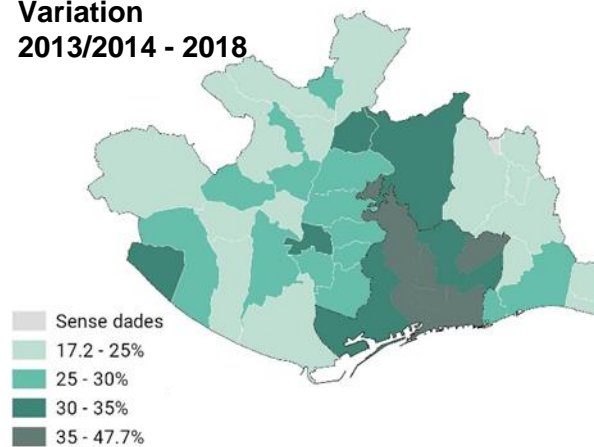
Year-on-year variation of average rental prices (%). 2006-2018



Avg. rental price 2018



Variation 2013/2014 - 2018



Source: Secretaria d'Hàbitat Urbà i Territori, a partir de les fiancespositades a l'Incasòl

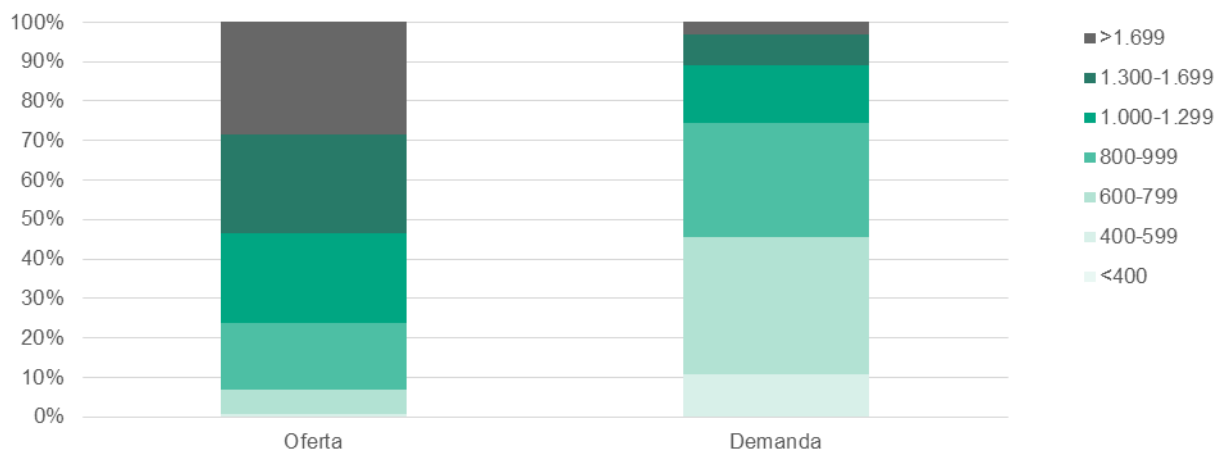
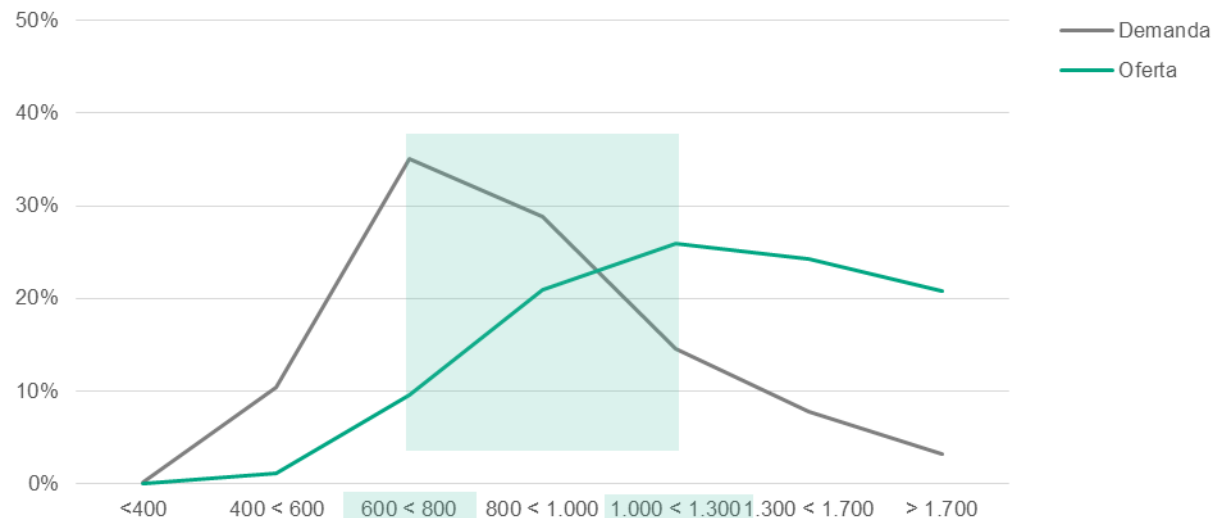
## Little correspondence between the prices of the rental offer and the demand

- Most popular rental demand: 600 - 800 €/month (35%)
- Most popular rental offer: >1.000 €/month (68%)

→ Both housing seekers and housing suppliers have to deal with great difficulties

→ Market price ceiling is confirmed

Price volume relation between supply and demand. Barcelona. 2T 2017 - 2T 2018



Source: Elaboració pròpia a partir de les dades cedides per Habitatcia. Laboratori "Oferta i demanda de lloguers a l'AMB".

## The offers with higher prices, advertised longer

**2-7 days advertised:**  
avg. 772 €/month

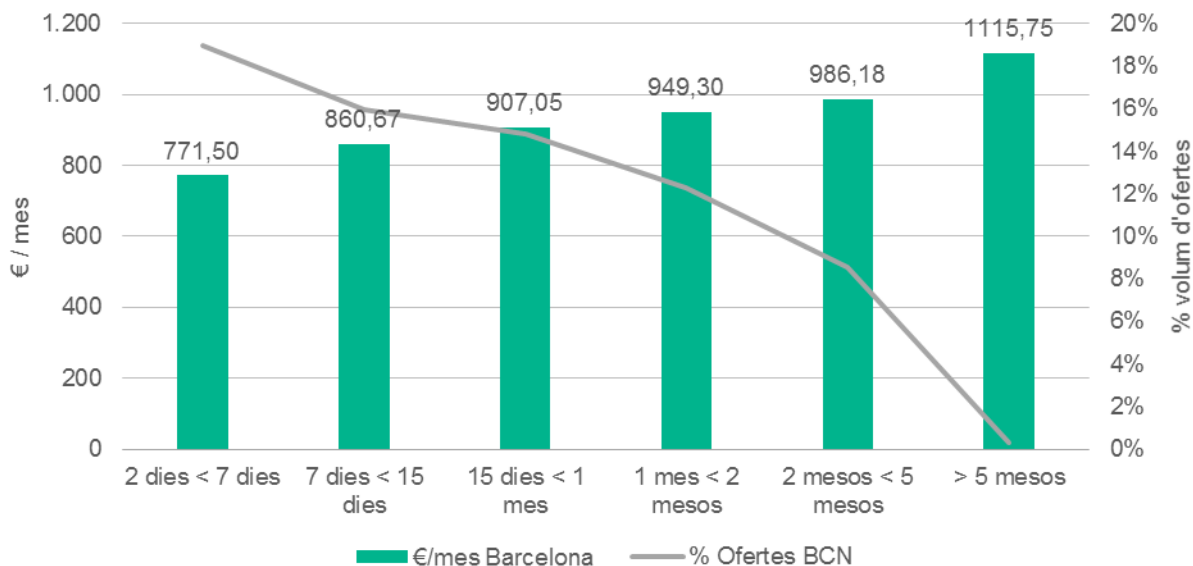
**>1 month advertised:**  
avg. 950 €/ month

**> 5 months advertised:**  
avg. 1116 €/ month

**The most demanded prices are similar to those in rental contracts**

There is a strong similarity between the prices that indicate the preferences of the demand with those of the contracts registered in the Catalan Land Institute.

**Ad volume according to number of days advertised and associated average price (€/month). Barcelona. 2T 2017 - 2T 2018**



**Average Price comparison. 2nd trimester 2018**

	Rental offer (real estate portal)	Rental demand (real estate portal)	Rental contract (INCASÒL deposit register)
Barcelona	1.443 €/month	908 €/month	916 €/month
MAB without Barcelona	1.019 €/month	725 €/month	723 €/month

## The growing separation of income and housing prices

### Barcelona, between 2000 and 2018:

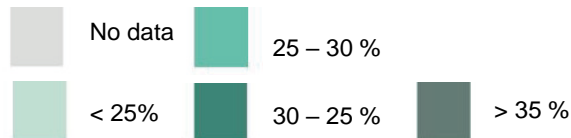
- RFDB\* per inhabitant has increased by 63,4%.
- Avg. rental price has increased by 128%.
- Avg. price of purchase and sale of second hand housing 145%.
- Avg. price of purchase and sale of new construction 148%.

### A household with 2,5 SMI (€ 2,146 monthly income):

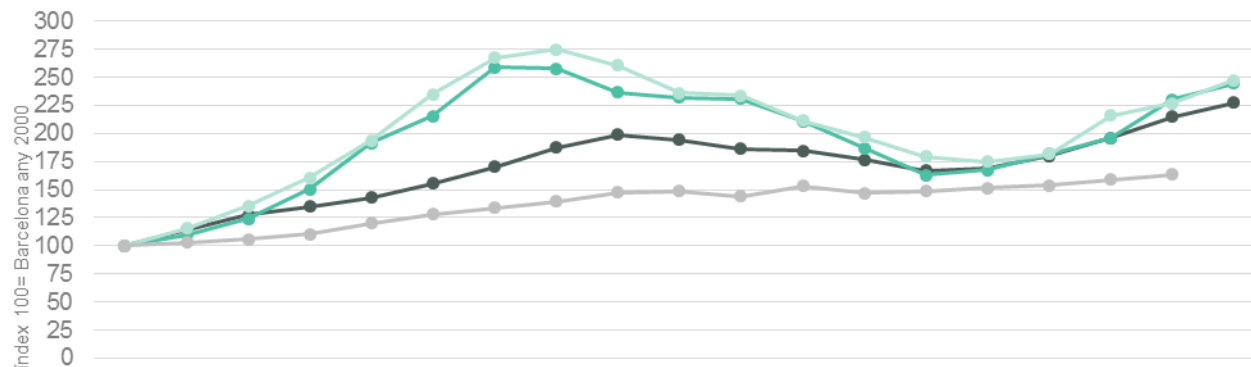
Could only access 5 (of 33) municipalities in the metropolitan area and no district of Barcelona.

### A household with 3.5 SMI (€ 3,000 net monthly):

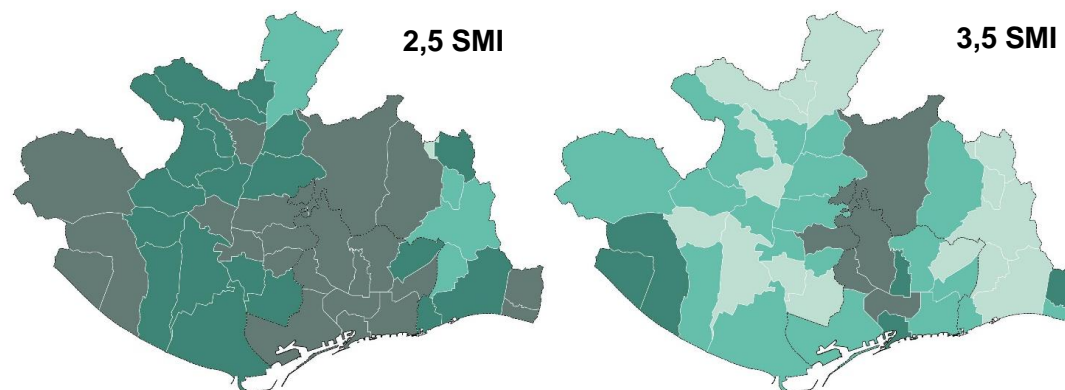
Could access 30 (out of 33) municipalities in the metropolitan area and 4 districts of Barcelona.



Evolution of gross disposable household income per inhabitant and average housing prices. 2000-2018. (index 100 = year 2000)



Housing access for long rental with income of 2.5 and 3.5 SMIs. Municipalities of the metropolitan area and districts of Barcelona. 3<sup>rd</sup> trimester 2018



Source: Elaboració pròpia a partir de Renda Familiar Disponible Bruta 2000-2015 de l'Idescat; Estimació RFDB 2016: a partir dels Salari estimats del Gabinet Tècnic de Programació. Ajuntament de Barcelona; Preu mitjà de lloguer: Secretaria d'Hàbitat i Millora Urbana, a partir de fiances dipositades a l'Incasòl; Preu mitjà de compravenda 2000-2013: Secretaria d'Hàbitat i Millora Urbana; Preu mitjà de compravenda 2013-2017: Secretaria d'Hàbitat i Millora Urbana, a partir del Col·legi de Registradors.

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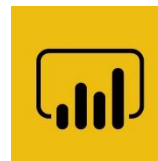
**Communication at O-HB**

# Data reports

## Paper reports



## Dynamic reports



**Filtres**

Període: 1t2018

Desti: All

Operador: All

Estat: All

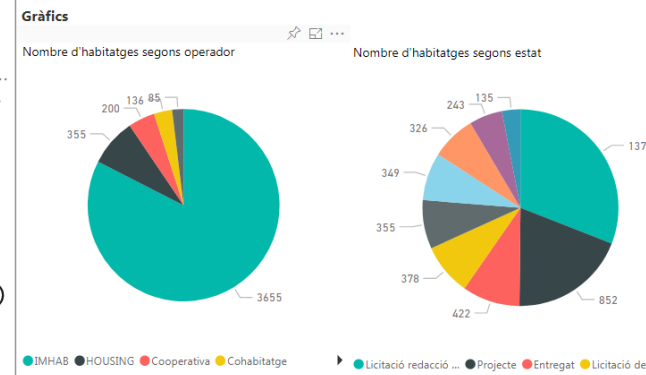
Districte: All

Final d'obres: 12/1/2014 - 6/2/2022

Licitació d'obra: 7/1/2010 - 10/1/2020

**Taula de dades**

Promoció	Adreça	Nhabitages	Nal·lotjaments	Aparcament
Illa Glòries	Gran Via de les Corts Catalanes 830-846	225	0	280
Marina Prat Vermell S8 D1+D2	Carrer Acer s/n	240	0	60
Trinitat Nova UA3 Bloc I	Carrer Palamós 88	76	0	19
Bon Pastor F1 (III fase)	Carrer Biosca 17	61	0	113
Gardunya - Fem ciutat	Plaça de la Gardunya 1	39	0	BSM
Roquetes AA3	Via Favència 271-275	122	0	35
Trinitat Nova Bloc H	Carrer S'Agaró s/n	83	0	83
Marina Prat Vermell S10 D24	Carrer Ulldecona 12-14	108	0	00
<b>Total</b>		<b>4431</b>	<b>201</b>	



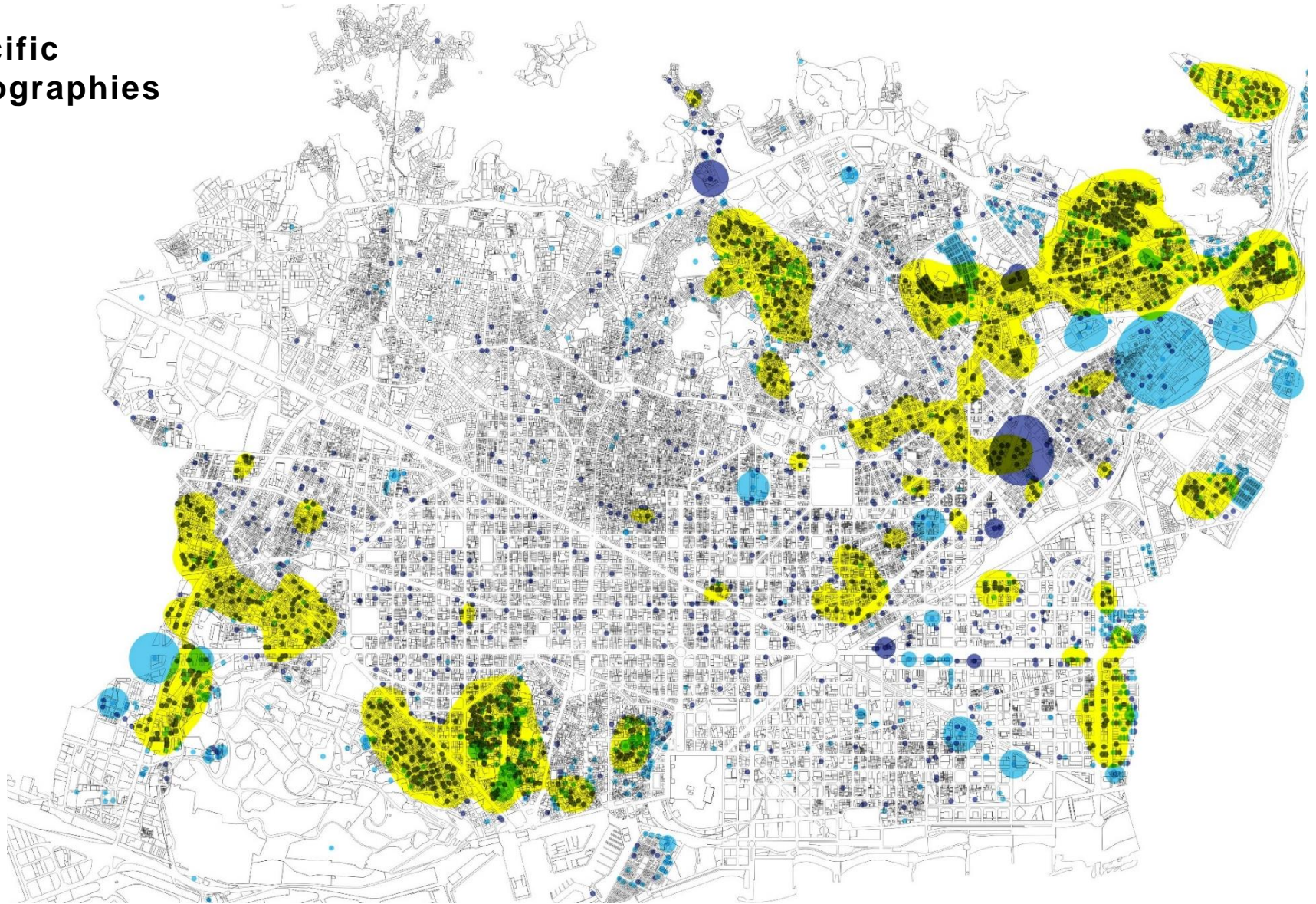


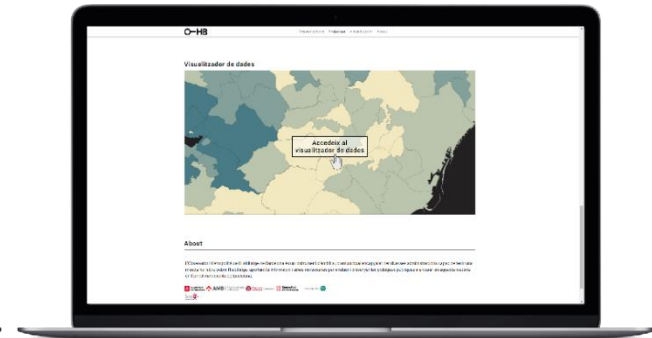
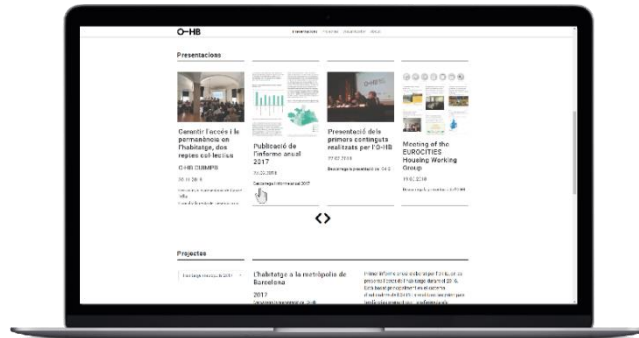
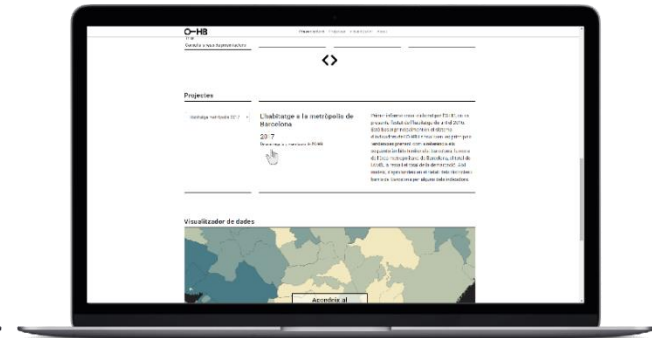
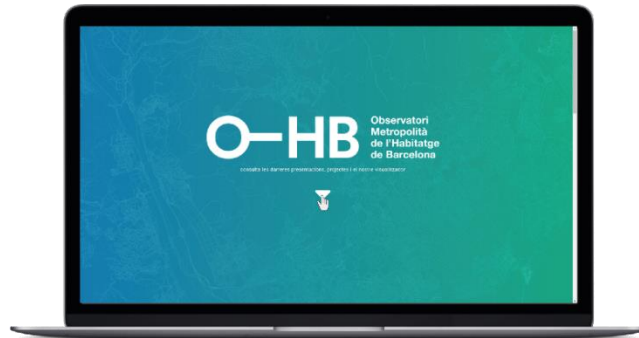


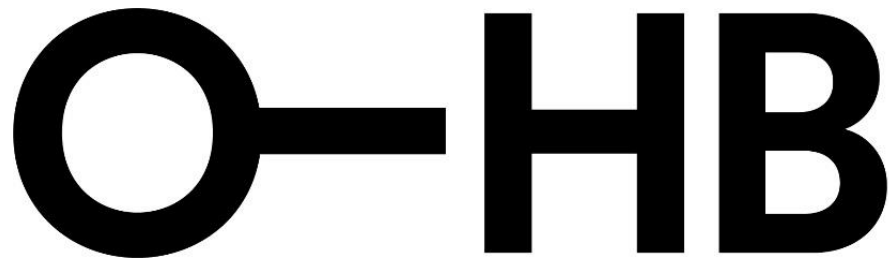




## Specific cartographies







**Observatori  
Metropolità  
de l'Habitatge  
de Barcelona**

**Thank you!**



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