The housing problem in
Barcelona

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2nd Expert Group Meeting on Indicators under SDG monitoring
October, 16th 2019
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?

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Communication at O-HB
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

2016
Design

2017
Launching

2018
1st delivery

2019
Consolidation

April
- Foundation
  With the support of:
  Barcelona City Council, Metropolitan Area of
  Barcelona, Provincial Council of
  Barcelona and the Social Housing Managers

January
- New membership
  Government of Catalonia

March
- Rent debate
  CCCB

July
- Public presentation of the
  I’O-HB
  CCCB Sala Mirador
  With: Carme Trilla, President of O-HB

February
- First Annual Report 2017
  AMB
  Presentation of the first results

October
- Conference on Access and permanence in
  housing
  CCCB
  With the collaboration of: CUIMP

July
- Second Annual Report 2018
  Presentation of the second edition

May
- Digital launching
  New website and new data display viewer

- Press conference
  Presentation of the Lab “The offer and demand for rentals”.
  With Habitacion& Fotocasa
Strategy 2020-2030

2020-2023

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

Geographical scope

- Province of Barcelona
- Metropolitan Area of Barcelona
- Barcelona

Data gaps
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.
O-HB laboratories developed in 2019

Supply and demand for rents in Barcelona and its metropolitan area

Comparative study on rent regulation in Paris and Berlin

Housing cost overburden rate

Home ownership structure and concentration

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
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.
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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%

Source: INE, padró continu de població

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

Source: Idescat, Estadística de población, 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.


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 2011 census figures are overestimated.

MAB:
- Census: 1,501,756 housing units

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)

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

<table>
<thead>
<tr>
<th>Taxpayers</th>
<th>Nº</th>
<th>% total</th>
<th>Housing units</th>
<th>Nº</th>
<th>% total</th>
<th>Avg. housing units / taxpayer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public administrations</td>
<td>87</td>
<td>0.0%</td>
<td>12,018</td>
<td>1,6%</td>
<td></td>
<td>138.1</td>
</tr>
<tr>
<td>Natural person</td>
<td>497,345</td>
<td>97.1%</td>
<td>655,300</td>
<td>84.6%</td>
<td></td>
<td>1.3</td>
</tr>
<tr>
<td>Legal entities</td>
<td>13,507</td>
<td>2.6%</td>
<td>82,838</td>
<td>10.7%</td>
<td></td>
<td>6.1</td>
</tr>
<tr>
<td>Non-profit organizations</td>
<td>414</td>
<td>0.1%</td>
<td>2,652</td>
<td>0.3%</td>
<td></td>
<td>6.4</td>
</tr>
<tr>
<td>Religious institutions</td>
<td>159</td>
<td>0.0%</td>
<td>1,192</td>
<td>0.2%</td>
<td></td>
<td>7.5</td>
</tr>
<tr>
<td>Communities of property / owners</td>
<td>602</td>
<td>0.1%</td>
<td>3,140</td>
<td>0.4%</td>
<td></td>
<td>5.2</td>
</tr>
<tr>
<td>Other</td>
<td>64</td>
<td>0.0%</td>
<td>468</td>
<td>0.1%</td>
<td></td>
<td>7.3</td>
</tr>
<tr>
<td>No data</td>
<td></td>
<td></td>
<td>16,582</td>
<td>2.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>512,178</td>
<td>100.0%</td>
<td>774,190</td>
<td>100.0%</td>
<td></td>
<td>1.5</td>
</tr>
</tbody>
</table>

### 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
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
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%
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

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**
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%

Source: Secretaría d’Hàbitat Urbà i Territori, a partir de les fianzas dipositades a l’Incàsòl
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.

Source: Secretaria d'Hàbitat Urbà i Territori, a partir de les fiances positades 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

Source: Elaboració pròpia a partir de les dades cedides per Habitaclia. 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.

Average Price comparison. 2nd trimester 2018

<table>
<thead>
<tr>
<th></th>
<th>Rental offer (real estate portal)</th>
<th>Rental demand (real estate portal)</th>
<th>Rental contract (INCASÒL deposit register)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcelona</td>
<td>1.443 €/month</td>
<td>908 €/month</td>
<td>916 €/month</td>
</tr>
<tr>
<td>MAB without Barcelona</td>
<td>1.019 €/month</td>
<td>725 €/month</td>
<td>723 €/month</td>
</tr>
</tbody>
</table>

Source: Elaboració pròpia a partir de les dades cedides per Habitaclia. Laboratori “Oferta i demanda de lloguers a l’AMB”.
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.

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www.ohb.cat/visor
Specific cartographies
Thank you!