

HOUSING STOCK IN THE CITY OF BARCELONA AND BARCELONA METROPOLITAN REGION 2024

Contents

- 1. Introduction 4
- 2. Methodology 4
 - 2.1. The housing stock of the Barcelona Metropolitan Region 6
 - 2.2. The metropolitan housing stock..... 6
 - 2.3. Public housing stock developers 7
 - 2.4. The social housing stock and the different tenure systems.....10
 - 2.5. Vacant housing units11
 - 2.6. Housing units for tourist use13
- 3. Characteristics of the housing stock of RMB 15
 - 3.1. Housing unit surface area.....15
 - 3.2. Number of persons living there.....16
 - 3.3. Surface area per occupant16
 - 3.4. Year of construction17
 - 3.5. Type of housing unit.....18
 - 3.6. The structure of households19
- 4. Demographic profile of the inhabitants of the RMB and the relationship with housing on an aggregate level 22
 - 4.1. Country of birth and housing unit surface area22
 - 4.2. Country of birth and surface area per occupant.....25
 - 4.3. Housing surface area by age group27
 - 4.4. Age groups and surface area per occupant.....29
 - 4.5. Disposable Household Income in the Metropolitan Region32
 - 4.6. Disposable household income in Barcelona.....32

5. Demographic profile and its relationship with housing by territorial areas	34
5.1. Foreign population and housing unit surface area	34
5.2. Foreign population and surface area per occupant	37
5.3. Housing surface area by age group	39
5.4. Age groups and surface area per occupant.....	41
6. Population movements	43
6.1. Change of residence in the period 2018-2027	43
6.2. Reasons for moving	44
6.3. The profile of people who change their place of residence.....	45
6.4. Satisfaction with one's home	51
6.5. Mobility flows	55
7. Analysis of supply and demand	59
7.1. Analysis of the supply	59
7.1.1. Rental market.....	59
7.1.2. Housing sales market	65
7.2. Analysis of demand	71
7.3. Housing turnover on the market.....	71
7.4. The relationship between population growth and housing.....	75
8. Conclusions / Discussion.....	79
9. References	81
10. Methodological annex	82

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1. Introduction

According to the third wave of 2024 of the Political Opinion Barometer by the Centre for Opinion Studies, **access to housing is the main concern of Catalans, surpassing dissatisfaction with politics and unemployment and job insecurity.** More than a third of Catalans highlight this issue as the most pressing, revealing the public relevance of the subject to be addressed in this report.

Like other large cities, Barcelona is particularly affected by issues regarding access to housing. The rise in rental prices in recent years, the use of housing for tourist purposes, the proliferation of the *expat* phenomenon and the expulsion of certain types of residents to the outskirts have been the subject of debate but there is a lack of a comprehensive perspective on the housing phenomenon in the Catalan capital.

Therefore, the aim of this study is to present an overview of the housing situation in the Barcelona Metropolitan Region (RMB), as well as of the residents and how they relate to their own homes.

This report is divided into seven sections, beginning with this introduction and a section detailing the methodology used in the study. This is followed by sections presenting the size of the housing stock together with its characteristics, followed by a profile of the residents of the RMB and how they relate to housing. Finally, population movements and the trend in the housing market will be analysed, both in terms of for-sale and rental housing.

2. Methodology

Addressing the issue of housing from such a broad perspective has been a challenge in terms of finding data sources that could be integrated into a single study in a fluid manner. Given the different areas of study, each section has been addressed individually with regard to obtaining data for the study.

Generally speaking, priority has been given to data sources with information available at the municipal level, so that the data can be grouped by territorial area. Unfortunately, this has not been possible for all sources. The following sources were analysed:

- Housing Studies and Documentation Service of

the Government of Catalonia

- Population and Housing Census of the National Institute of Statistics (INE)
- Urban Cohesion Survey by the Metropolis Institute
- Question by the Housing Observatory in the GESOP Omnibus survey
- Barcelona City Council Open Data
- Property market registers (Spanish Association of Land, Business and Moveable Property Registrars)
- Register of bonds deposited with INCASÒL
- Idescat

Regarding the first data source, this has been used for the first section (housing stock). The definition of social housing used by the Housing Studies and Documentation Service of the Government of Catalonia has been used, counting those housing units that enjoy the status of social housing under the current legislation. This body works on the basis of the definitive classifications of all developments, estimating the date of expiry of protection in accordance with the regulations under which the housing unit has been classified. This does not include unclassified housing units built by INCASÒL under public promotion schemes and neighbourhood redevelopment programmes. This information was last updated on 31 December 2023.

The INE Population and Housing Census is the most widely used source. Specifically, it has been used in the first, second, third and fourth sections. In terms of housing stock, it has been used to quantify the private housing stock. It includes all those listed as such in the Land Registry. In order to maintain statistical confidentiality, data from the Housing Census could not be obtained for some municipalities. These are sixteen municipalities with small populations. These municipalities do not have social housing units and have therefore been excluded from the analysis. These figures are from 2021, as the census is conducted every 10 years. There is therefore a two-year discrepancy between the census and the data provided by the Government of Catalonia.

When quantifying private housing, both primary housing units, i.e. those used as the usual residence of their members, and non-primary housing units (e.g. second homes and empty housing units) are taken into account. Although social housing units must be the main type of housing, non-main units are also included, as they are also part of the Region's housing

stock. However, for non-principal housing units, no information is collected on the tenure systems. Therefore, only the main housing units are counted in the calculations made on the total number of housing units in each of the systems.

This Census has also been used to obtain data on energy consumption in vacant housing units. The INE considers vacant housing units to be those without an electricity supply contract or with total consumption recorded during the previous year lower than the average housing unit in the municipality divided by 24.

When analysing the characteristics of housing units, the Census collects data on the main characteristics of housing units (surface area, number of occupants, year of construction, etc.). Some of these characteristics, however, only apply to the main housing units, i.e. those that are the usual residence of the people who live there. Buildings where there are no residents are not taken into account under any circumstances. The source of the data for the families living there is the same, although the unit of analysis changes from the housing unit to household.

For those variables with a very high number of categories, these have been grouped together to facilitate visualisation.

Unfortunately, the microdata from the Census of Population and Housing Units only contains data for municipalities with more than 10,000 inhabitants, therefore we have opted to use the interactive tool provided by the INE to create customised tables.

This tool provides results for the vast majority of municipalities, except for those that are very small, where it would not be possible to maintain statistical confidentiality (between ten and fifty municipalities in the present study, according to the analysis variable). This is a trade-off between the representativeness of the data and the possibilities of cross-referencing different variables.

For sections three and four, the demographic profile of the inhabitants of the Barcelona Metropolitan Region was drawn up by analysing their country of birth and the composition of the demographic pyramid into age groups. These two variables have been combined with two fundamental housing characteristics: the surface area of the housing unit and the surface area per occupant. By combining these variables, the aim is to study the relationship between the various

demographic profiles living in the metropolitan area and housing.

In the case of country of birth, in order to make the study feasible, the various nationalities have been grouped into nine regions: North America, Latin America and the Caribbean, North Africa and the Middle East, Sub-Saharan Africa, Central and South Asia, East Asia and Southeast Asia, European Union and Switzerland, non-EU Europe and Oceania. In order to cross-reference demographic profile variables, housing characteristics and territorial areas in the Barcelona Metropolitan Region, the five regions with the highest presence in the territory were selected: Latin America and the Caribbean (48% of the total foreign population), the European Union and Switzerland (15.6%), North Africa and the Middle East (13.8%), Central and South Asia (6.8%) and East Asia and Southeast Asia (6.2%).

The Urban Cohesion Survey (ECURB), published in 2022 by the Metropolis Institute, has been used to analyse population movements. Thanks are due to this institution, as they have provided the microdata that have made it possible to carry out the analysis of population movements.

Unfortunately, these microdata did not contain information on the municipality or the scope of the persons surveyed, a fact that limits them to the following three territorial scopes: Barcelona, Rest of the Metropolitan Area and Rest of the Metropolitan Region.

In addition, in those questions with a scale of 0 - 10, where 0 means not at all and 10 means very much, the answers have been re-categorised as follows:

- 0 – 3: Little or no agreement/satisfaction
- 4 – 6: Neither agree/satisfied nor disagree/dissatisfied
- 7 – 10: Quite agree or very much agree/satisfied

Finally, the answers "Does not know" and "No answer" have not been taken into account, as they have been computed as missing values. All the calculations have been carried out by means of the weight of each of the observations.

Due to the low sample in some categories when cross-referencing many categories, it has been decided to aggregate the results for all areas in some figures, always bearing in mind that there are no major differences between areas and that the sample is low.

The supply and demand data shown in the study are taken from the construction and property market statistics portal of the Government of Catalonia, part of the Housing Studies and

Documentation Service of the Government of Catalonia. In order to measure changes in supply, in the case of the housing sales market, the data used come from the property market registers held by the Spanish Association of Land, Business and Moveable Property Registrars, whereas in the case of the rental market, the data used come from the registry of rental bonds deposited with the Catalan Land Institute (Incasòl). Finally, data from the Population and Housing Census for 2021 have been used to calculate the percentage of housing turnover on the market.

Among the main limitations identified in the analysis are the difficulty of accessing data on housing demand, which usually depends on private platforms and is not available in open formats. For this reason, the analysis of demand contained in this section is based on two elements: firstly, the number of rental and sales contracts signed; and secondly, the results of the question "Are you currently actively looking for housing in Catalonia? To rent or to buy?" included in the Omnibus survey conducted by GESOP in autumn 2023 and published by the Barcelona Metropolitan Housing Observatory, which includes a breakdown of the results according to the population residing in the Barcelona Metropolitan Region (RMB), compared to other areas such as the Barcelona Metropolitan Area (AMB), Barcelona city and the rest of Catalonia.

Where disaggregated data for the different districts of the city of Barcelona could be obtained, the data was obtained from the Barcelona Data Portal.

In terms of spatial analysis, the municipalities of the RMB have been grouped into nine territorial areas. These areas are the result of municipalities coming together to create zones that mainly cover their workplaces with people who live in the areas themselves. The territorial areas resulting from this are Baix Llobregat Nord, Baix Llobregat Sud, Barcelonès (Badalona, Sant Adrià de Besòs and Santa Coloma de Gramenet), Barcelona city, Garraf-Penedès, Maresme, Vallès Occidental Est, Vallès Occidental Oest and Vallès Oriental. For further details on the classification, see the methodological appendix.

2.1. The housing stock of the Barcelona Metropolitan Region

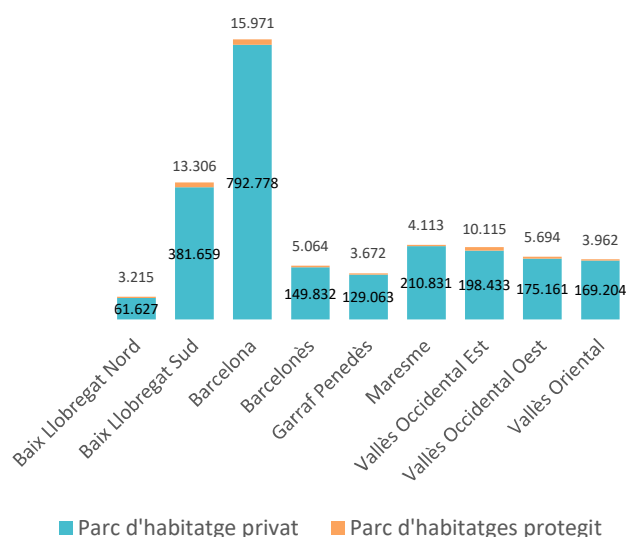
The aim of this first section is to quantify the number of social and private housing units in the Barcelona Metropolitan Region. These two housing stocks will be assessed and their main characteristics as public housing stocks will be observed in terms of type of developer and tenure system.

2.2. The metropolitan housing stock

The housing stock in the Metropolitan Region stands at 2,257,435 housing units. Of these, 1,994,550 are main primary housing units (85% of the total), i.e., they are used as the usual residence of the members who live there, whereas the remaining 339,150 are secondary housing units (15% of the total).

A large proportion of the housing units in the metropolitan region are concentrated in Barcelona, with more than 800,000 public and private housing units. This is followed by the Baix Llobregat Sud, with around 400,000 housing units. Trailing behind are Maresme, with 215,000 housing units, the two areas of Vallès Occidental Oest, with around 200,000 each, and Vallès Oriental, with less than 170,000 housing units. The remaining areas have fewer than 150,000 housing units.

Figure 1. Barcelona Metropolitan Region housing stock by territorial area



Source: Original using data from the INE Population and Housing Census and the Housing Studies and Documentation Service of the Government of Catalonia.

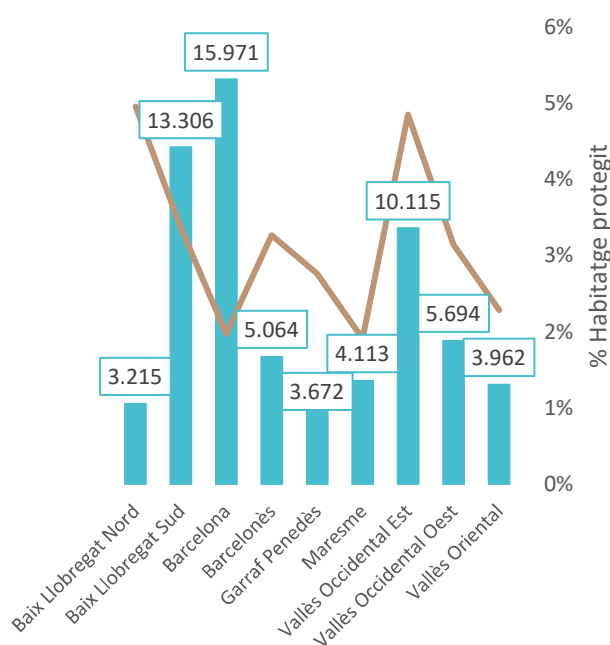
The housing stock in the Barcelona Metropolitan Region is mostly privately owned. **Social housing represents a minimal percentage, only 65,112 housing units, accounting for 2.79% of the total housing stock.** In absolute terms, Barcelona is again in first place, with nearly 16,000 housing

2024 Housing Report

units. The southern part of Baix Llobregat is close behind thanks to its more than 13,000 public housing units, while the eastern part of Vallès Occidental has just over 10,000.

However, when focusing on the relative weight of social housing, the picture changes. **Baix Llobregat Nord, with 4.96%, and Vallès Occidental Est, with 4.85%, are the areas with the highest percentages of social housing.** Around 3% can also be found in Baix Llobregat Sud (3.37%), Barcelonès (3.27%) and Vallès Occidental Oest (3.15%). Other areas with low rates include the **Maresme region, with a mere 1.91% of social housing, and the city of Barcelona, with 1.97%.**

Figure 2. Social housing stock in the RMB by area



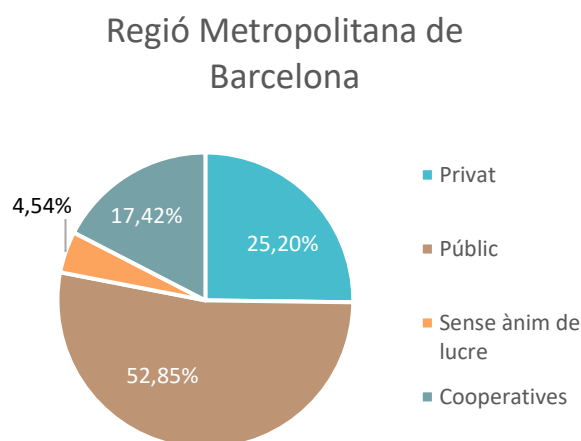
Source: Original using data from the INE Population and Housing Census and the Housing Studies and Documentation Service of the Government of Catalonia.

2.3. Public housing stock developers

The Housing Studies and Documentation Service identifies four possible developers of social housing: private, public, non-profit developers and cooperatives. **In the RMB as a whole, most social housing units are publicly developed (52.85%),** while the remaining

percentage is divided among the other agents. The private sector stands out, with 25.2%, followed by cooperatives, with 17.42%. Non-profit developers are the smallest group, accounting for only 4.54% of social housing units.

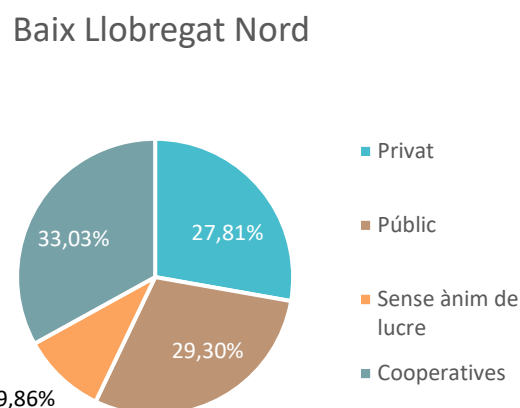
Figure 3. Distribution of public housing units by developer type. Total RMB



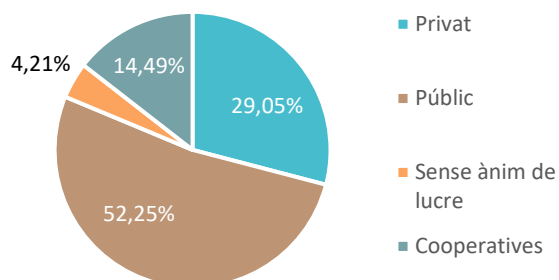
Source: Original using data from the Housing Studies and Documentation Service of the Government of Catalonia.

In terms of different areas, **Barcelona city and the Barcelonès region stand out for the strong presence of the public sector (68.72% and 62.76%, respectively),** to the detriment of cooperatives in both cases and especially of the private sector in the case of the Catalan capital. In turn, **the private sector has a greater presence in Maresme, with 34.69%. Non-profit developers play an important role in Garraf-Penedès, with 10.89%, Baix Llobregat Nord, with 9.86%, and Vallès Occidental Oest, with 9.52%. Cooperatives, meanwhile, have a strong presence in Vallès Oriental, with 48.23%, and in the northern part of Baix Llobregat, with 33.03%.**

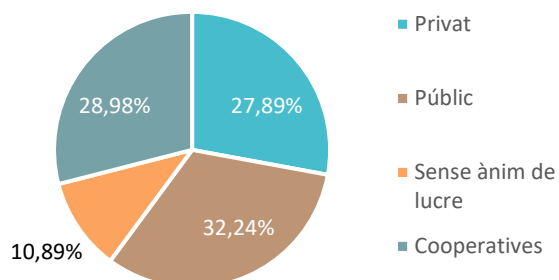
Figure 4. Distribution of public housing stock by type of developer by area



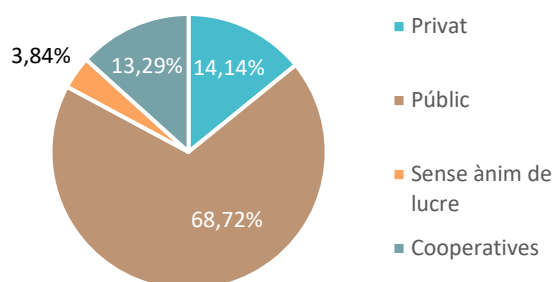
Baix Llobregat Sud



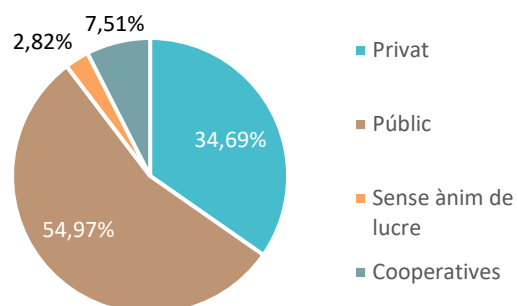
Garraf-Penedès



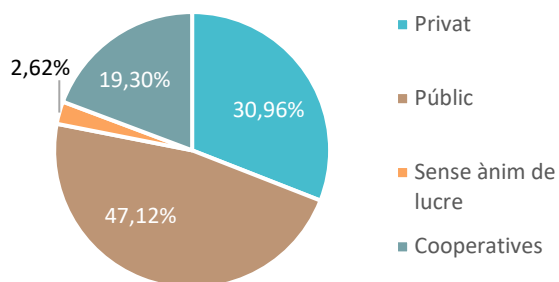
Barcelona



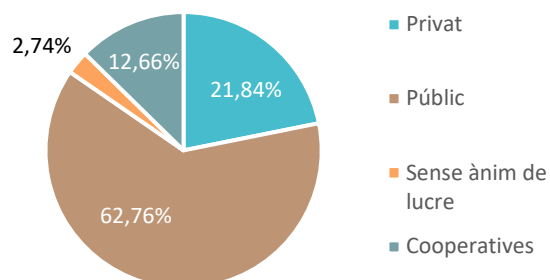
Maresme



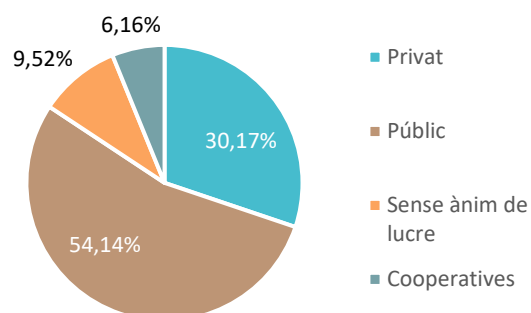
Vallès Occidental Est



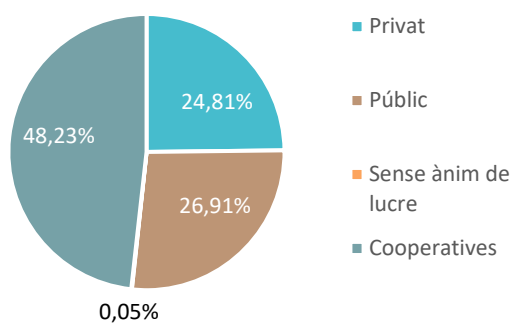
Barcelonès



Vallès Occidental Oest

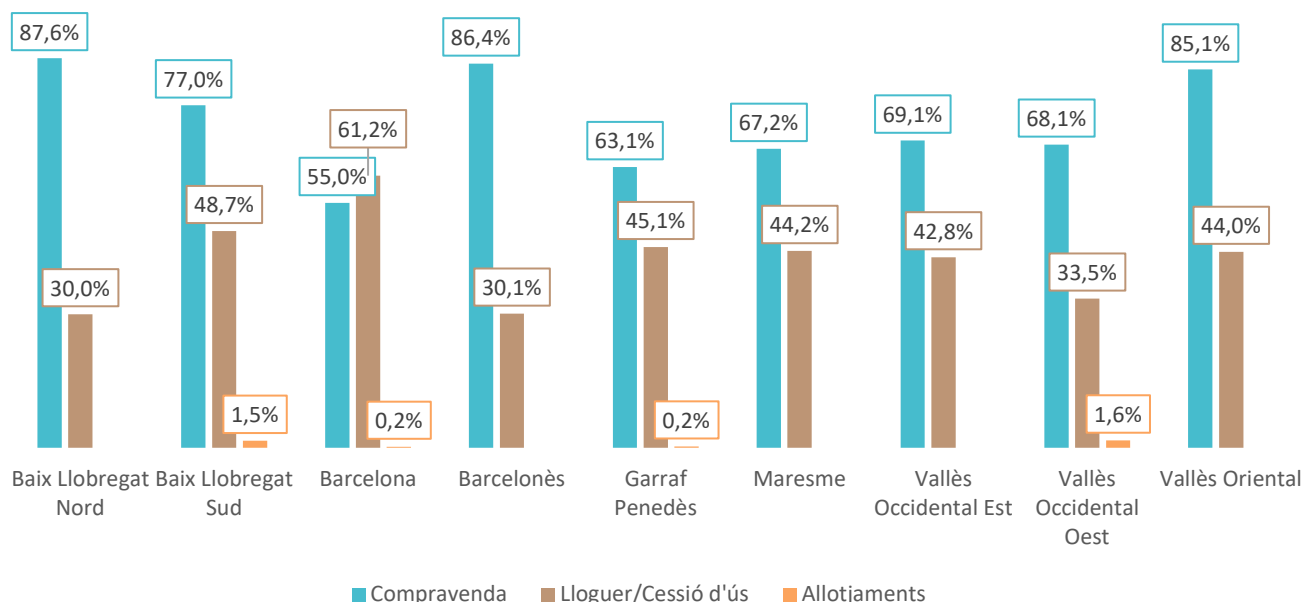


Vallès Oriental



Source: Original using data from the Housing Studies and Documentation Service of the Government of Catalonia.

Figure 5. Weight of social housing units relative to the total available housing under the same tenure system



Source: Original using data from the Housing Studies and Documentation Service of the Government of Catalonia.

If each developer is compared with the total housing stock, it can be seen that none of them has a significant weight in the overall stock. **There are only two cases where a social housing developer exceeds the 2% threshold of total housing in the area. These are publicly promoted housing units in the Barcelonès and Vallès Occidental Est areas.** The largest share of the private sector is found in the eastern part of Vallès Occidental, with 1.5% of the total stock, while non-profit developers account for less than 0.5% in all cases. Cooperatives, meanwhile, have a certain presence in Baix Llobregat Nord, where they account for 1.64% of the total housing stock, and in Vallès Oriental, where they have developed 1.1% of the housing units, in what appears to be a localised phenomenon.

2.4. The social housing stock and the different tenure systems

With regard to the tenure system, social housing units are divided into those that are sold, rented (including transfer of use), accommodation, and both owned and rented. Housing units in this last category have been included in both the purchase and sale and rental

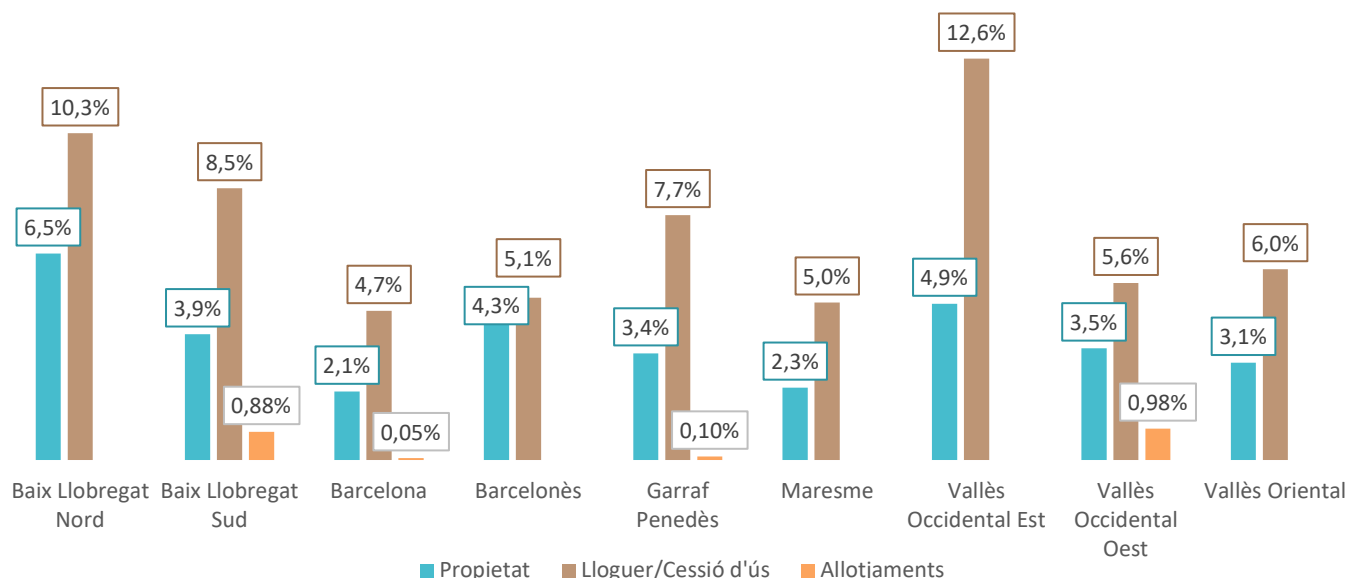
categories in order to obtain the total number of housing units available for each type of tenure. Accommodation, meanwhile, has been compared to the category “Other tenure systems” in the INE Housing Census.

In general terms, social housing units account for a higher percentage of the rental market than the sales market, approximately double. In the RMB as a whole, social housing units account for only 6.3% of the rental stock. The figures for the stock of properties for sale are even bleaker, as social housing units account for only 3.33% of the total.

Focusing on the different territorial areas, **social housing units account for between 5% and 13% of the rental market and between 2% and 7% of the sales stock, depending on the area.** In Barcelonès, there are fewer differences between the two types of tenure, but there are more in the eastern part of Vallès Occidental. Accommodation, on the other hand, accounts for a tiny percentage of housing units under other tenure systems, accounting for less than 1% in all areas.

2024 Housing Report

Figure 7. Distribution of social housing units according to their tenure system



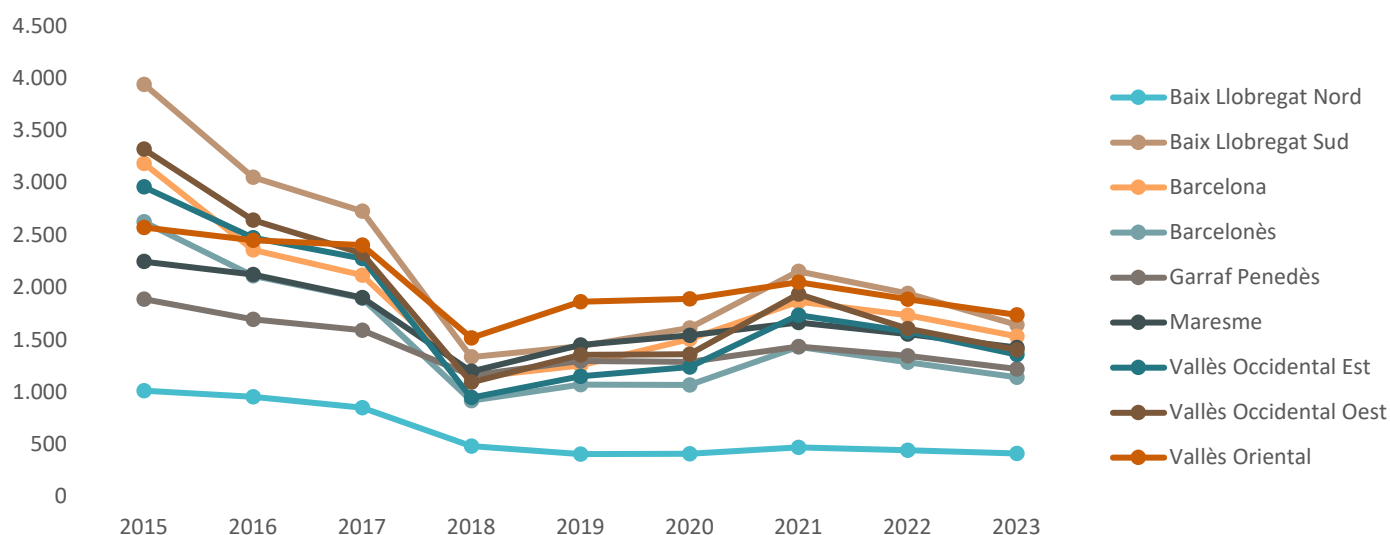
Source: Original using data from the Housing Studies and Documentation Service of the Government of Catalonia.

With regard to the different tenure systems within the social housing stock, it was found that the vast majority are intended for sale, accounting for over 85% of total social housing in the northern part of Baix Llobregat, Barcelonès and Vallès Oriental. The city of Barcelona stands out in this regard, as it is the only area where there are more social housing units available for rent than for sale. In other areas, social housing units intended for rent do not exceed 50%. Baix Llobregat Sud does not reach 30% (29.98%), while Barcelonès exceed it, albeit slightly (30.11%).

The existence and relevance of vacant housing units in the Metropolitan Region has been the subject of study and debate in recent years. Currently, there are two main sources to consult when researching this issue, and they present very different views. Firstly, in 2015, the Catalan Government announced the creation of a register of vacant housing units and illegally occupied housing units. In total, according to the Government of Catalonia's registry, in the Barcelona Metropolitan Region, 11,868 vacant housing units were registered in 2023, less than half as many as in 2015. This decrease, however, only continued until 2019, since when the number of vacant housing units registered has remained fairly stable.

2.5. Vacant housing units

Figure 6. Trend in the number of vacant housing units (2015–2023)



Source: Original using data from the Housing Studies and Documentation Service of the Government of Catalonia (2023).

2024 Housing Report

In absolute figures, the northern area of Baix Llobregat stands out for its low number of vacant housing units, while the other areas share similar results, switching positions throughout the period analysed.

According to these figures, only 0.6% of the housing stock in the RMB is vacant. By area, Barcelona stands out for its low percentage of registered vacant housing units, at 0.2%, followed by the two areas of Baix Llobregat and Maresme. Conversely, the Garraf-Penedès, Vallès Occidental Oest and Vallès Oriental regions are over 1%.

Figure 8. Percentage of vacant housing units according to the RHBO [Register of Vacant and Illegally Occupied Housing Units] by area (2021)



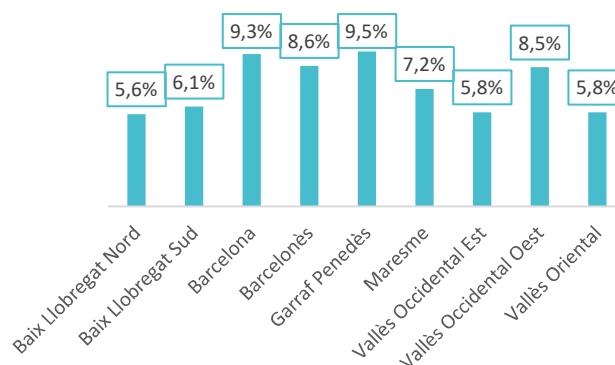
Source: Original using data from the Housing Studies and Documentation Service of the Government of Catalonia and the INE Population and Housing Census (2021)

When observing the territorial aspect of registered vacant housing units, it can be seen that in areas with high demand, such as Barcelona and Baix Llobregat Sud, the percentage of registered vacant housing units is much lower than in areas further away from the capital, such as Garraf-Penedès or Vallès Oriental. However, there are exceptions to this rule, such as the Barcelonès area, which has a higher percentage of registered empty housing units than Baix Llobregat Nord. The city of Barcelona, where the housing problem is most acute, has a negligible percentage of registered vacant housing units.

Since its latest edition, the INE Housing Census has included a variable for classifying housing units based on their electricity consumption. This variable classifies housing units as vacant if their consumption

is less than a 24th part of the municipal average, which is equivalent to less than 15 days per year. **When comparing the data recorded with that of the INE Housing Census, two very different realities can be observed.** In this case, **vacant housing units in the RMB would represent 7.8% of the total housing stock**, a figure much higher than that obtained from the Generalitat's register.

Figure 9. Percentage of vacant housing units according to the INE by area (2021)



Source: Original using data from the INE Population and Housing Census (2021)

The results by area would also be very different, **with 9.3% of housing units in Barcelona vacant**, the second highest area after Garraf-Penedès. In any case, all areas are above the 5% threshold.

These figures paint a very different picture from that of the Government of Catalonia's Register of Vacant Housing Units. Approximately 9% of the total metropolitan area covered by these figures would represent around 200,000 empty housing units throughout the region. In addition, the situation is particularly serious in Barcelona, where more than 75,000 housing units are estimated to be vacant. When related to the high demand for housing concentrated in Barcelona, these 75,000 empty housing units in the Catalan capital could contribute to alleviating, albeit slightly, the problem of access to housing.

However, **caution is needed when interpreting these figures.** The latest Housing Census available at the time of writing this report is the one for 2021, which **was compiled using electricity consumption data from the year prior to**

the census, i.e. 2020¹. 2020 was an exceptional year in many ways, due to the emergence and rapid spread of coronavirus during the first quarter of the year and the measures that were put in place as a result. It is to be expected that three parallel phenomena would occur that year with regard to electricity consumption: firstly, **mass lockdowns would increase the average electricity consumption of housing units** (raising the consumption threshold required to be considered vacant); secondly, **mobility restrictions prevented the normal use of housing units intended for second homes or tourist use**; and thirdly, the exodus, albeit limited, of **part of the population to second homes outside the metropolitan region**, which could distort the usual consumption patterns of occupied households.

Although the impact of these phenomena has not been quantified, **the extraordinary circumstances under which these measures were taken and the lack of historical data with which to compare them mean that caution should be exercised when considering them as definitive.** In any case, the combination of the two sources provides us with a reference point for the range within which the figures for this phenomenon fluctuate.

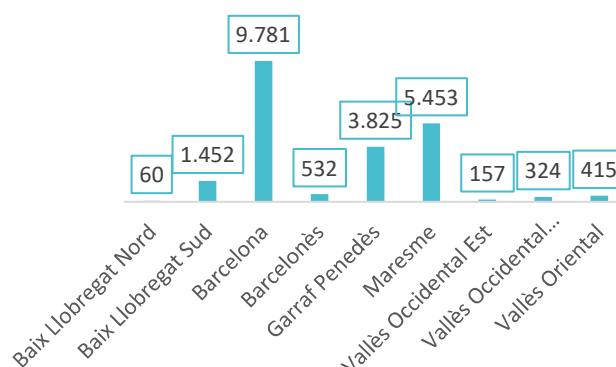
2.6. Housing units for tourist use

In recent years, there has been a growing debate surrounding housing units for tourist use, especially in large cities and other high-pressure areas. Barcelona is no exception. Unfortunately, the data only collects information on legal housing units for tourist use, it does not include all those that are not registered but are used for this purpose.

As can be seen in Figure 10, Barcelona is the area with the highest number of registered housing units for tourist use, with nearly 10,000. It is followed by Maresme, with more than 5,000, and Garraf Penedès, with nearly 4,000. In this case, proximity to Barcelona does not seem to be a determining factor in the number of tourist accommodations, but it is possible that this phenomenon is more prevalent in coastal

areas.

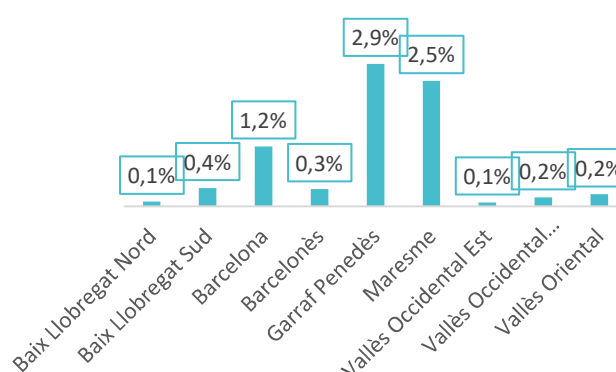
Figure 10. Number of housing units for tourist use by area (2024)



Source: Original using data from Idescat (2024).

The same phenomenon can be observed in relative terms (Figure 11), with Garraf-Penedès and Maresme being the two areas with the highest concentration of housing units for tourist use, both above 2.5%. Barcelona is above 1%, whereas the rest do not reach 0.5%. Therefore, these figures seem to indicate that the phenomenon of housing units for tourist use is something that is localised in certain specific areas, mainly coastal areas and the Catalan capital. In most areas, however, registered housing units for tourist use account for a minimal proportion of the total housing stock.

Figure 11. Percentage of housing units for tourist use by area (2021; 2024)



Source: Original using data from Idescat (2024).

If the focus is placed on the city of Barcelona (Figure 12), the Eixample district stands out above the rest, with almost 5,000 registered housing units for tourist use. Gràcia, Sant Martí

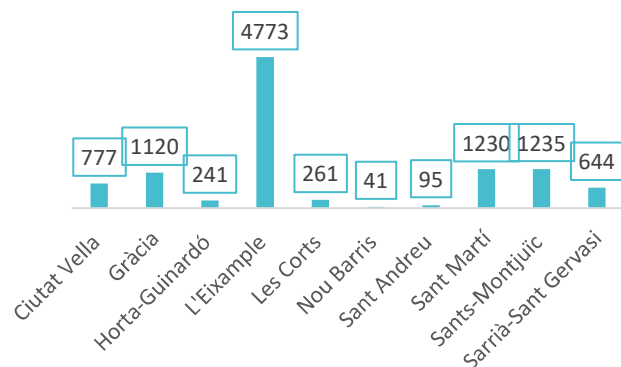
¹ See methodology of the INE Population and Housing Census 2021:

https://www.ine.es/censos2021/censos2021_meto.pdf

2024 Housing Report

and Sants Montjuïc have slightly more than 1,000 housing units of this type, while Ciutat Vella and Sarrià-Sant Gervasi have fewer. In the rest of the districts, housing units for tourist use account for a smaller proportion.

Figure 12. Number of housing units for tourist use by area (2024)



Source: Original, using data from the Barcelona Data Portal (2024)

In general, both in Barcelona and in the RMB as a whole, the housing units for tourist use recorded are located in areas with the greatest tourist appeal, both in coastal areas and in the most central areas of Barcelona. However, this analysis does not take into account housing units for tourist use that are not registered as such and are therefore in an irregular situation. Nevertheless, the lack of alternatives makes this register the best possible approximation to this issue.

Key points

The social housing stock accounts for a negligible proportion of the total housing stock in the Barcelona metropolitan area. Of the more than two million homes in the Barcelona Metropolitan Region, only 65,112 are listed as social housing. That represents only 2.79% of the total number of housing units in the region.

This situation repeats itself across all territorial areas, with social housing ranging between 1% and 5%.

The public sector plays a major role in promoting social housing. The private sector and cooperatives also play a leading role in this area, being particularly relevant in some fields.

More than two-thirds of social housing units are for sale, while less than half are for rent. The exception is the city of Barcelona, where there are more properties for rent than for sale. Looking at the total number of housing units in each tenure system, social housing units account for a larger share of rented housing than owner-occupied units.

The percentage of vacant housing units varies depending on the data source, with just over 0.5% according to the RHBO of the Government of Catalonia and close to 9% according to electricity consumption.

The phenomenon of housing units for tourist use is found in very specific areas and seems to be related to proximity to the coast and the centre of Barcelona.

3. Characteristics of the housing stock of RMB

The characteristics of the housing units have a direct impact on the lives of the people living in them. The space, the type of building, or its age affect the comfort of its members and facilitate (or hinder) the forming of families. The Barcelona Metropolitan Region has all kinds of housing, reflecting the diversity of resources available and ways of living together in the area. This section will explore where and how people residing in the RMB live.

Firstly, the main characteristics of the housing units will be analysed: surface area, number of residents, year of construction and type of building. Secondly, the composition of the people living there will be analysed, including their age, type of household and their relationship with the available space.

3.1. Housing unit surface area

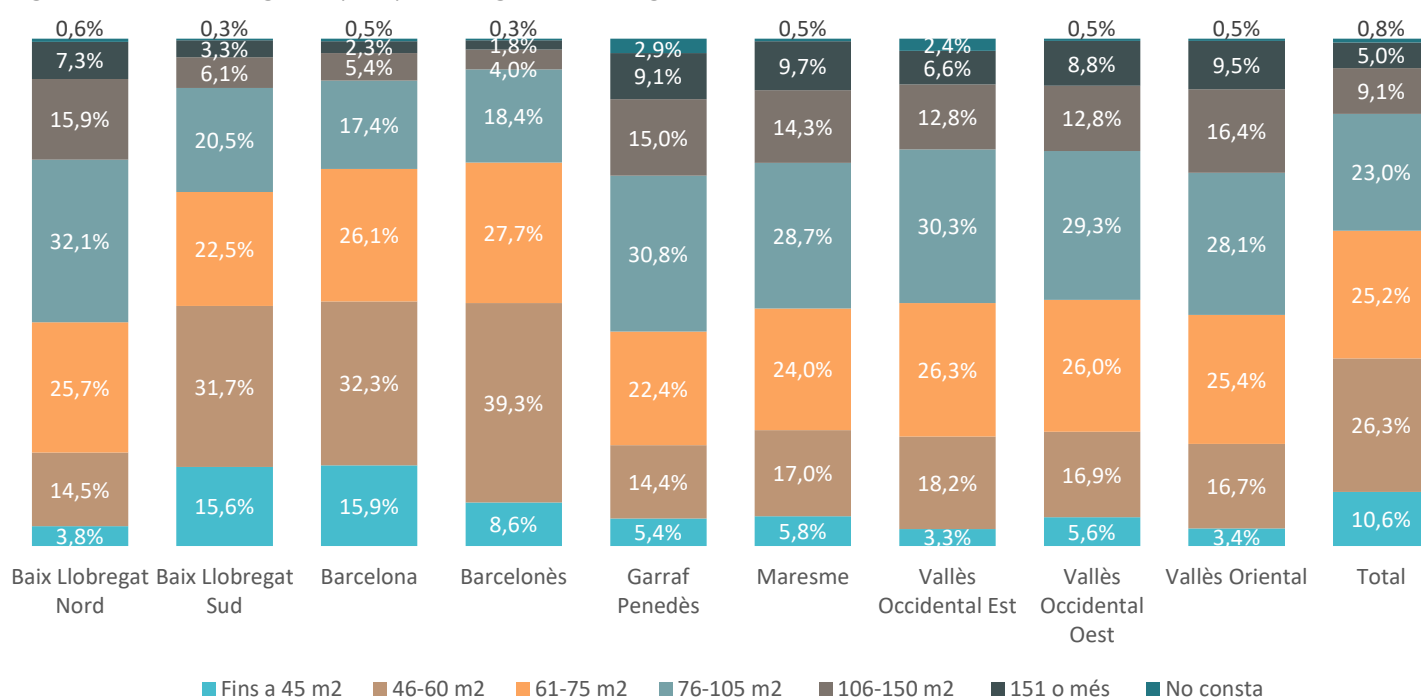
The surface area of housing units is one of their most important characteristics, affecting many other elements such as price, the type of families that can live there and the comfort they can enjoy. The first

appears to be one of the most important when it comes to studying the metropolitan housing stock in depth.

As can be seen in Figure 13, the surface area of the metropolitan housing stock (74.5% of the total) is between 46 m² and 105 m². The largest group is that of housing units with a surface area between 46 m² and 60 m², accounting for 26.3% of the total number of primary housing units, while the group between 61 m² and 75 m² accounts for 25.2%. Next are housing units between 76 m² and 105 m², accounting for 23%. The categories at the ends of the scale represent approximately 10% each, with housing units of up to 45 m² (10.6%) slightly outweighing those of 151 m² or more (9.1%). Although there are cases for which no surface area data is available, these only account for 0.8% of total housing units. Looking at the different territorial areas, differences can be observed between Barcelona city and the surrounding areas, and those areas further away from the Catalan capital.

Barcelona, together with Barcelonès and Baix Llobregat Sud, is characterised for having smaller housing units, particularly those with a surface area of between 46 m² and 60 m² (39.3% in Barcelonès, 32.3% in Barcelona and 31.7% in the south of Baix Llobregat) and the group of housing units of up to 45 m², with 15.9% of the total in Barcelona and 15.6% in the south of Baix Llobregat. Housing units larger than 106 m² account for less than 10% of the total in these areas. These

Figure 13. Persons residing in the principal housing units according to area



Source: Original using data from the INE Population and Housing Census (2021).

step, therefore, is to analyse this element, which

figures reflect the urban reality in which these areas coexist.

In contrast, larger housing units are more common in areas further away from Barcelona. Accordingly, housing units larger than 75 m² account for around 55% of the total housing stock in Baix Llobregat Nord, Garraf Penedès, Maresme and Vallès Oriental, and is close to 50% in the two areas of Vallès Occidental.

In these areas, the main category is housing units with a surface area of between 76 m² and 105 m², while housing units between 45 m² and 60 m² (the most numerous category in areas close to Barcelona) are relegated to third or fourth place.

Large housing units take centre stage, with notable figures such as 9.7% for housing units of 151 m² or more in Maresme and 9.5% for this group in Vallès Oriental. These figures reflect the reality in the rural part of these areas, far from the big city of Barcelona.

3.2. Number of persons living there

Turning to residents (Figure 14), more than 50% of the primary housing stock in the Barcelona Metropolitan Region is occupied by one or two people. Groups of 3 and 4 people also have a significant presence in the metropolitan stock, while those with 5 or more people account for a minimal percentage.

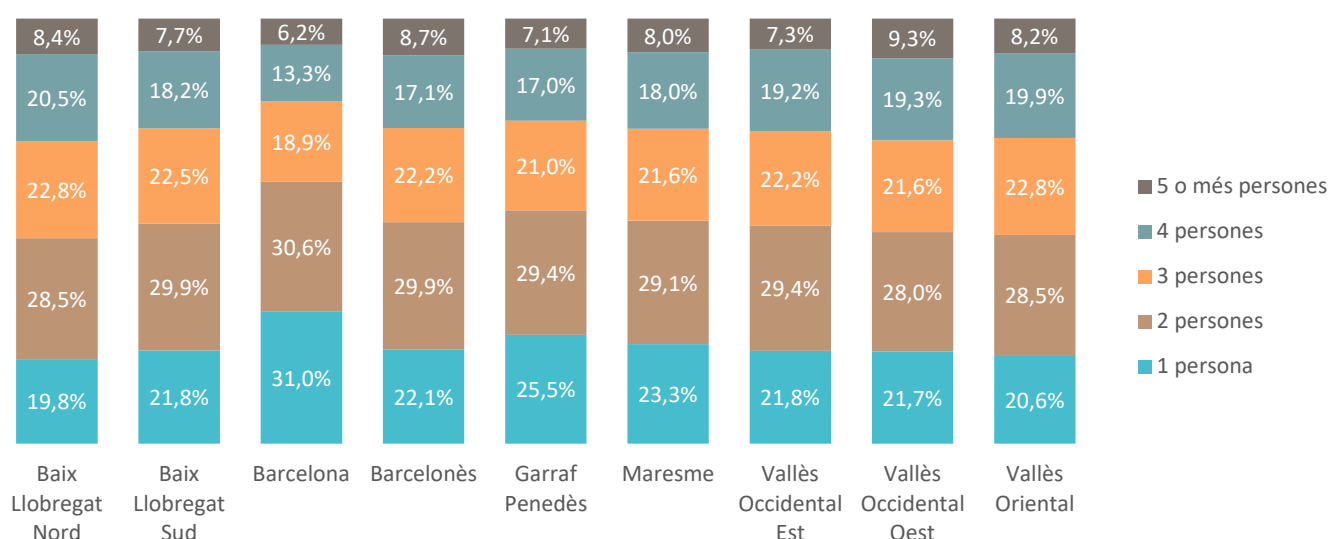
while those with three occupants account for only 18.9% (compared to 21% of the total housing stock). Housing units of four occupants account for 13.3% and, finally, 6.2% are housing units of five or more people. These figures are consistent with the surface area of the housing units observed previously, with smaller housing units but fewer people living in them, thus providing sufficient space for their inhabitants. However, this is not observed in areas surrounding the Catalan capital, where, despite the small size of housing units, a large number of people live together.

3.3. Surface area per occupant

The surface area per occupant provides a measure that relates the two characteristics observed above, while allowing for a deeper understanding of the living conditions of the people who live there. Overall, there is a strong distribution among the different categories, with housing units in which each occupant has between 20 m² and less than 30 m² being the main category, although this only accounts for 24.7% of housing units in the metropolitan area (Figure 15).

This is followed by housing units of between 40 m² and less than 60 m² per occupant, with 17.76%, and those of 30 m² and less than 40 m² per occupant, with 16.06%. Next, there are categories closer to the opposite extremes of the scale,

Figure 14. Distribution of housing units according to the number of people living there by area



Source: Original using data from the INE Population and Housing Census (2021).

Barcelona presents figures that differ from the rest of the areas. In the Catalan capital, 31% of housing units are occupied by a single person, compared to 23.9% of the total housing stock outside the city limits.

Housing units with two occupants account for 30.6%,

such as housing units with between 15 m² and less than 20 m² per occupant, representing 12.81%, and at the other extreme, those with between 60 m² and less than 80 m² per occupant, representing 10.05%. The remaining categories account for less than 10%. Similar to the trends observed so far, clear differences can be seen between areas close to and

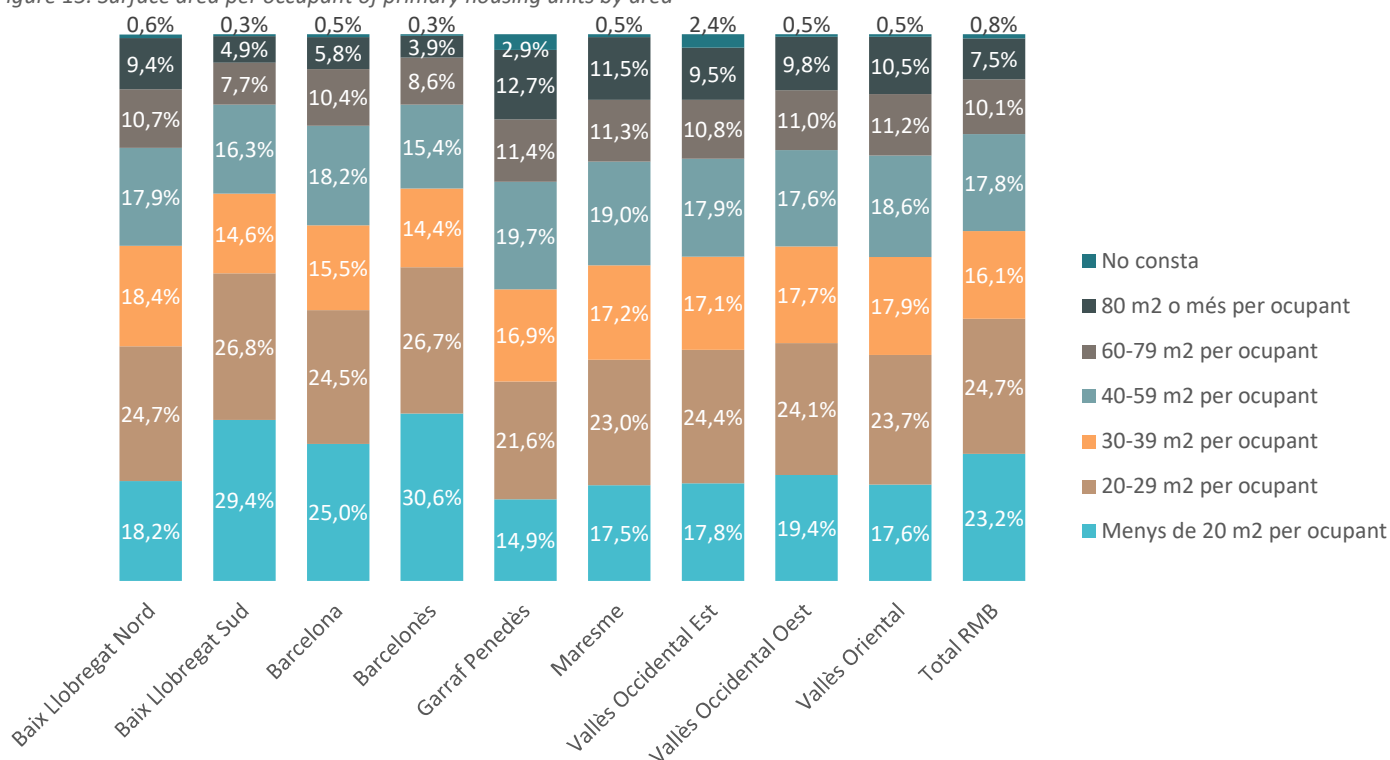
2024 Housing Report

far from Barcelona city. This means that remote areas such as Garraf Penedès stand out for having a large surface area per occupant in a significant part of the housing stock (43.81% of housing units have 40 m² or more per occupant), while in areas geographically close to the Catalan capital, the available space tends to be smaller (this group accounts for only 27.9% of housing units in the Barcelona area).

around 60%, a considerably lower figure than in the rest of the areas, with percentages ranging from 82% in the case of Garraf-Penedès to 90% in Barcelonès.

Within the intervals studied, the period that saw the most new housing construction was 1961-1980 (45% of the housing stock in the Barcelona Metropolitan Region), with figures ranging from 29% of the housing stock built in the case of Garraf-Penedès to 65% in the case of Barcelonès. Barcelonès is

Figure 15. Surface area per occupant of primary housing units by area



Source: Original using data from the INE Population and Housing Census (2021).

Barcelona city is once again proving itself to be a middle ground between these two realities. Compared to neighbouring areas, these have a greater weight in categories below 30 m² per occupant, while Barcelona ranks above this threshold.

precisely one of the areas that has grown the most in recent decades in terms of housing, together with Baix Llobregat Nord.

These areas only account for 11% and 8% of the current built-up area prior to 1961. The second period that saw the greatest expansion of the housing stock was between 1981 and 2000 (18.60%), followed closely by 2001-2020 (14.69%).

3.4. Year of construction

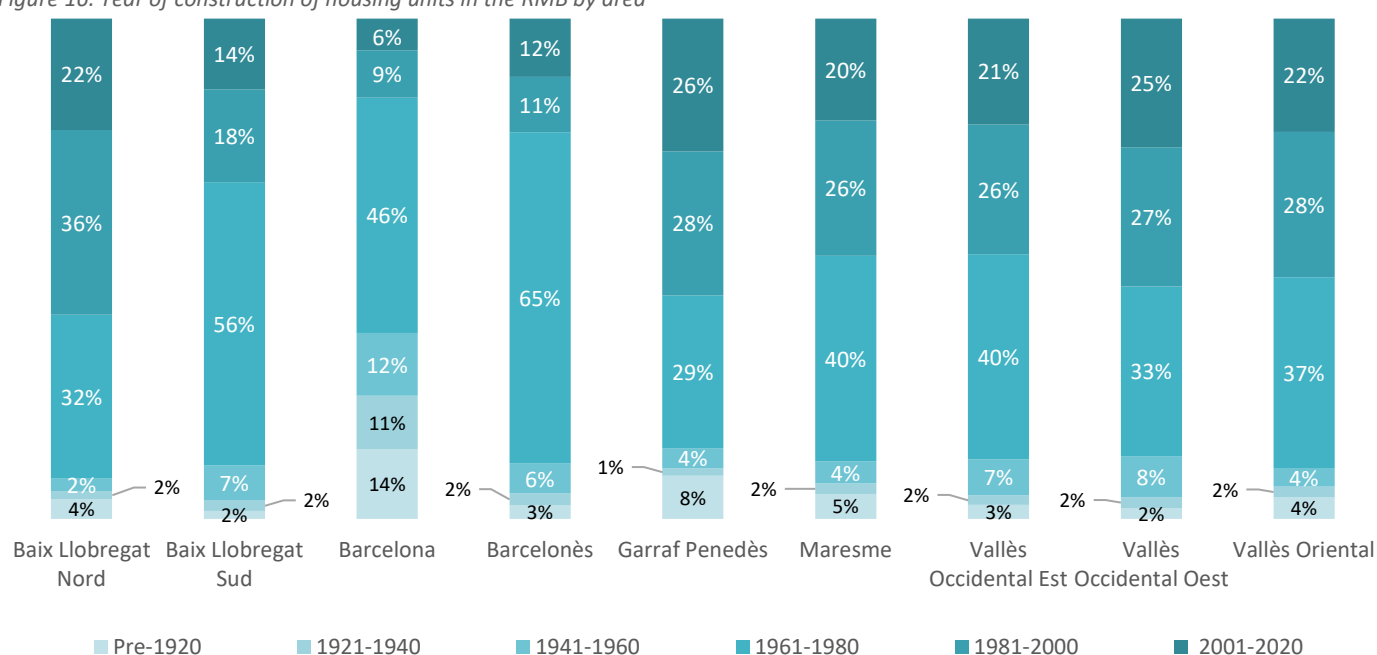
Most of the housing stock in the Barcelona Metropolitan Region was built between 1961 and 2020 (Figure 16). Although there are certain differences between regions, which will be discussed later, almost 80% of existing housing units were built during the period mentioned above. The only area that does not follow the aforementioned trend is the city of Barcelona, where housing units built between 1961 and 2020 account for

This means that Barcelona is now the only city with a significant housing stock built before 1961, accounting for around 36% of the current housing stock. Within this, the distribution among the selected intervals is relatively even, with the pre-1920 period being the most significant (14%), followed by the period 1941-1960 (12%) and finally the period 1921-1940 (11%). In the rest of the territory, the pre-1961 figure is significantly lower, stabilising at around 11%. The figures range from 8% in the case of the territory with the least housing built before 1961 (Barcelonès) to 12.29% (Vallès Occidental Oest).

territories observed, although there are considerable differences in the weight of this type of building in relation to the total number of buildings in the different areas (Figure 17). Therefore, a number of territories clearly dominate in terms of residential buildings with three or more housing units, with the city of Barcelona being the most paradigmatic example of this trend. 96% of the housing stock in the city falls into this category, the highest figure in the entire Metropolitan Region. In second place is the Barcelonès area, where 91% of the housing stock consists of more than three housing units per residential building.

Residential housing with a single housing unit follows far

Figure 16. Year of construction of housing units in the RMB by area



Source: Original using data from the INE Population and Housing Census (2021).

3.5. Type of housing unit

Type of housing unit refers to the configuration of the residential building unit; whether it is a building with only one housing unit, two or more than three. These categories are provided by the INE's Census of Population and Housing, which is a limitation of this source, but allows for an initial approximation of residential density. This is therefore an initial approximation of how the resident population is distributed across different territorial areas in terms of type of housing unit, and is a good indicator of density, as well as the type of housing stock that predominates in each territorial area.

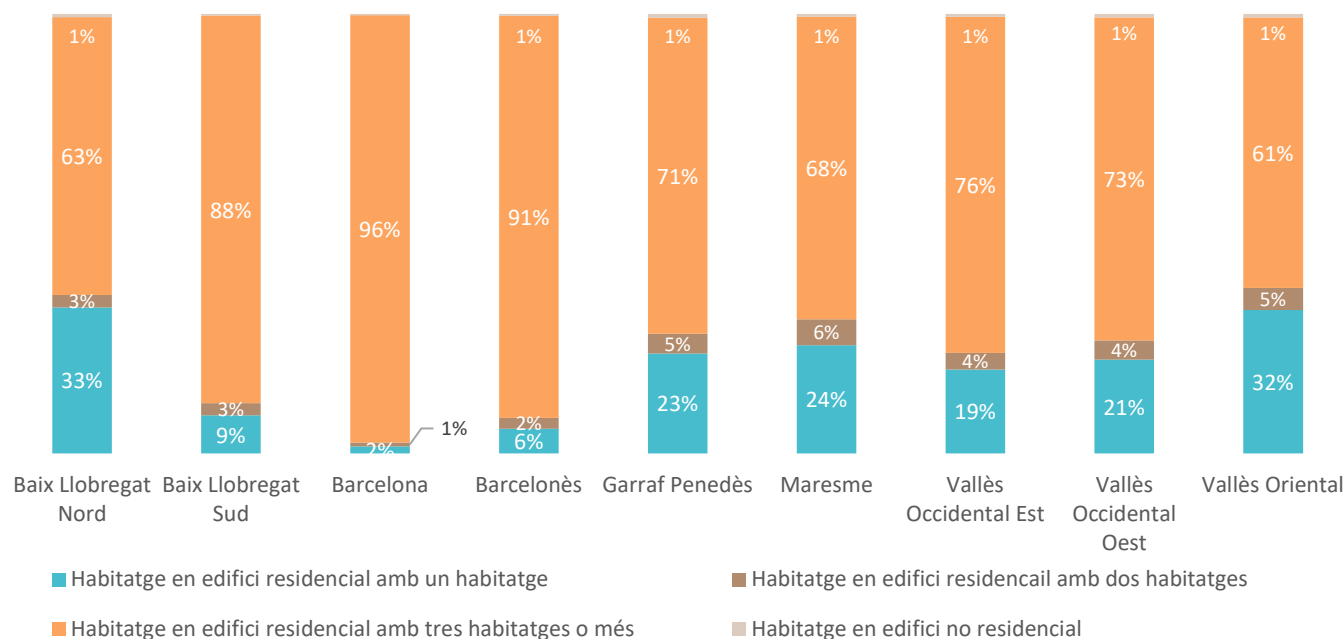
In general terms, residential buildings with three or more housing units play a leading role in all the

behind, with only 6%. Lastly, Baix Llobregat Nord also presents a similar picture, with 88% of the type mentioned, although residential buildings with a single housing unit account for 9%.

Although residential buildings with more than three housing units remain the dominant type in the six remaining territories, single-family housing units account for a significant percentage of the total. Thus, there is an upward trend from Vallès Occidental Est (19% of buildings with a single housing unit) to Baix Llobregat Nord (33%), which is the area with the highest percentage of this type of housing. However, residential housing with two housing units is a residual type throughout the Metropolitan Region, reaching its maximum level in Maresme with 6%.

2024 Housing Report

Figure 17: Types of housing unit by territorial area.



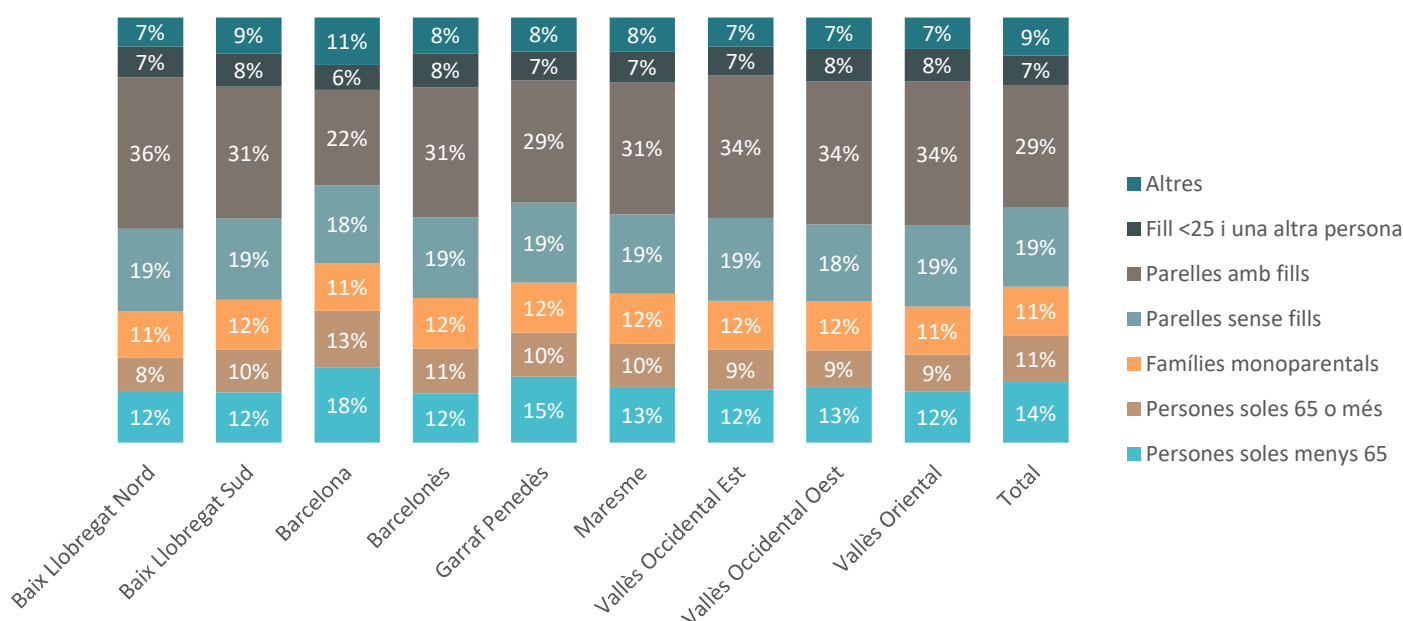
Source: Original using data from the INE Population and Housing Census (2021).

3.6. The structure of households

The structure of the households reflects the type of people who live there and their relationships with each other. In this section, the unit of analysis becomes the household, i.e. the group of people residing in the same family housing unit.

Figure 18 shows the distribution of the different types of house structures according to the people who live in them. It can be observed that all territorial areas except for the city of Barcelona have a very similar distribution. Couples with children are the most common group, accounting for around 30-35% of cases. The city of Barcelona is once again the exception, with only 22% of households in this group.

Figure 18: Structure of households by territorial area.



Source: Original using data from the INE Population and Housing Census (2021).

2024 Housing Report

In contrast, 31% of households in the Catalan capital are made up of a single person, a figure that contrasts with the rest of the areas, where none of them exceed 25%.

Couples without children account for around 18%, while single-parent families account for between 11% and 12%. Households with one parent, a child under 25 and another person account for between 6% and 8%, and those structures that fall into the "other" category account for between 7% and 9%, except in Barcelona city, where the figure rises to 11%.

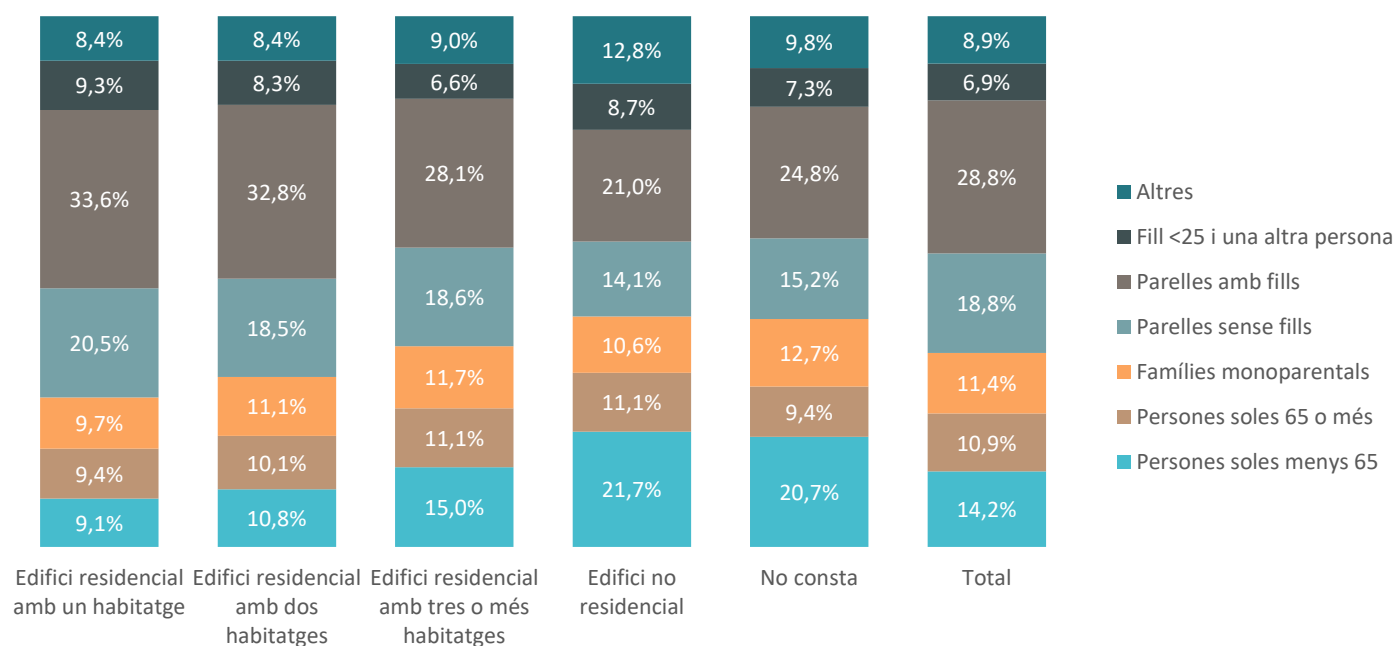
In fact, couples (both with and without children) are the most common form of cohabitation in seven of the nine areas, accounting for between 50% and 53% of households. The exceptions are the Garraf Penedès area (48%) and, some way behind, the city of Barcelona (40%).

with more housing units. These data seem to indicate that the number of people in the household, particularly the number of adults (who can therefore contribute financially to the household), has an effect on the type of housing chosen or accessible to the household.

When considering the different territorial areas (see figure available in the appendices) the trends appear to replicate those observed in the two previous figures.

When observing the same phenomenon from a different perspective, the results are even more extreme. Figure 20 shows an evident decrease in the number of single persons as the surface area increases, going from a significant proportion in smaller housing units, where they account for more than a third of the total in housing units up to 45 m², to a minimal proportion in large housing units, where they do not reach a fifth. In contrast, couples with children increase their weight in larger housing units, reaching 38% in housing units between

Figure 19: Structure of households by building type



Source: Original using data from the INE Population and Housing Census (2021).

In terms of the type of buildings in which people live (Figure 19), buildings with a single housing unit are the type of building with the most occupants, particularly notable in the case of couples with children, a category that becomes less prevalent as the number of housing units in buildings increases. Couples without children and households where parents live together, a child under 25 years of age and another person follow the same pattern.

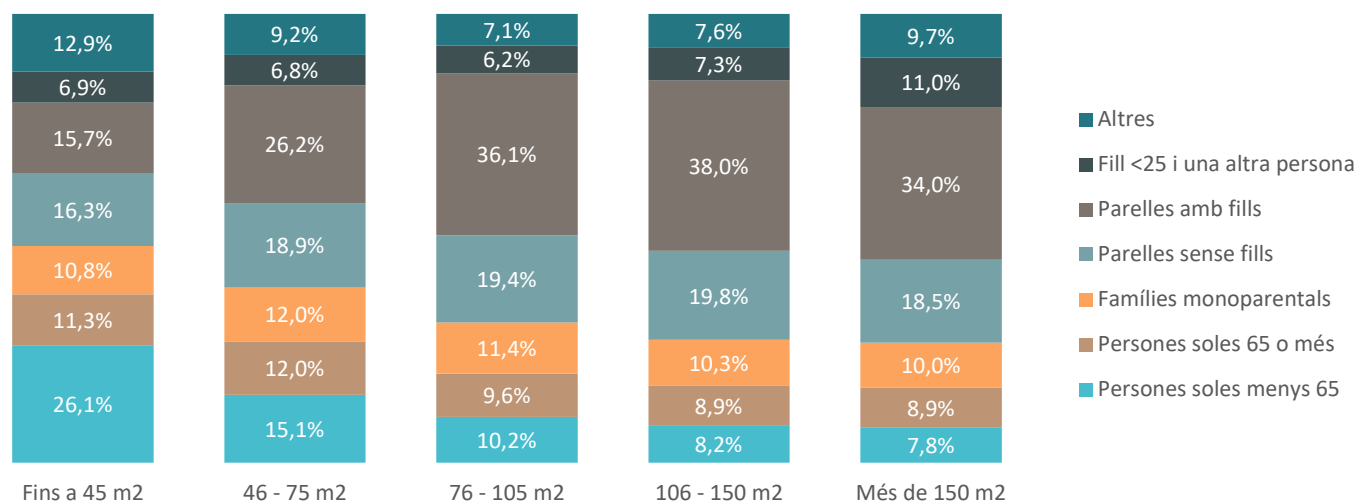
Structures with fewer members, such as single people or single-parent families, are more relevant in buildings

106 and 150 m².

The differences between the areas (as shown again in the appendices) are clearer in this case. In all areas except those bordering the Catalan capital (Barcelonès and Baix Llobregat Sud), buildings of up to 45 m² are dominated by people living alone, while in these two areas specifically there are all kinds of family structures, with families with children (20% in Baix Llobregat and 22% in Barcelona) outnumbering single people under 65 (17% and 19%, respectively) in both cases.

Report on the housing stock in the Barcelona Metropolitan Region,

Figure 20: Structure of households by housing unit surface area



Source: Original using data from the INE Population and Housing Census (2021).

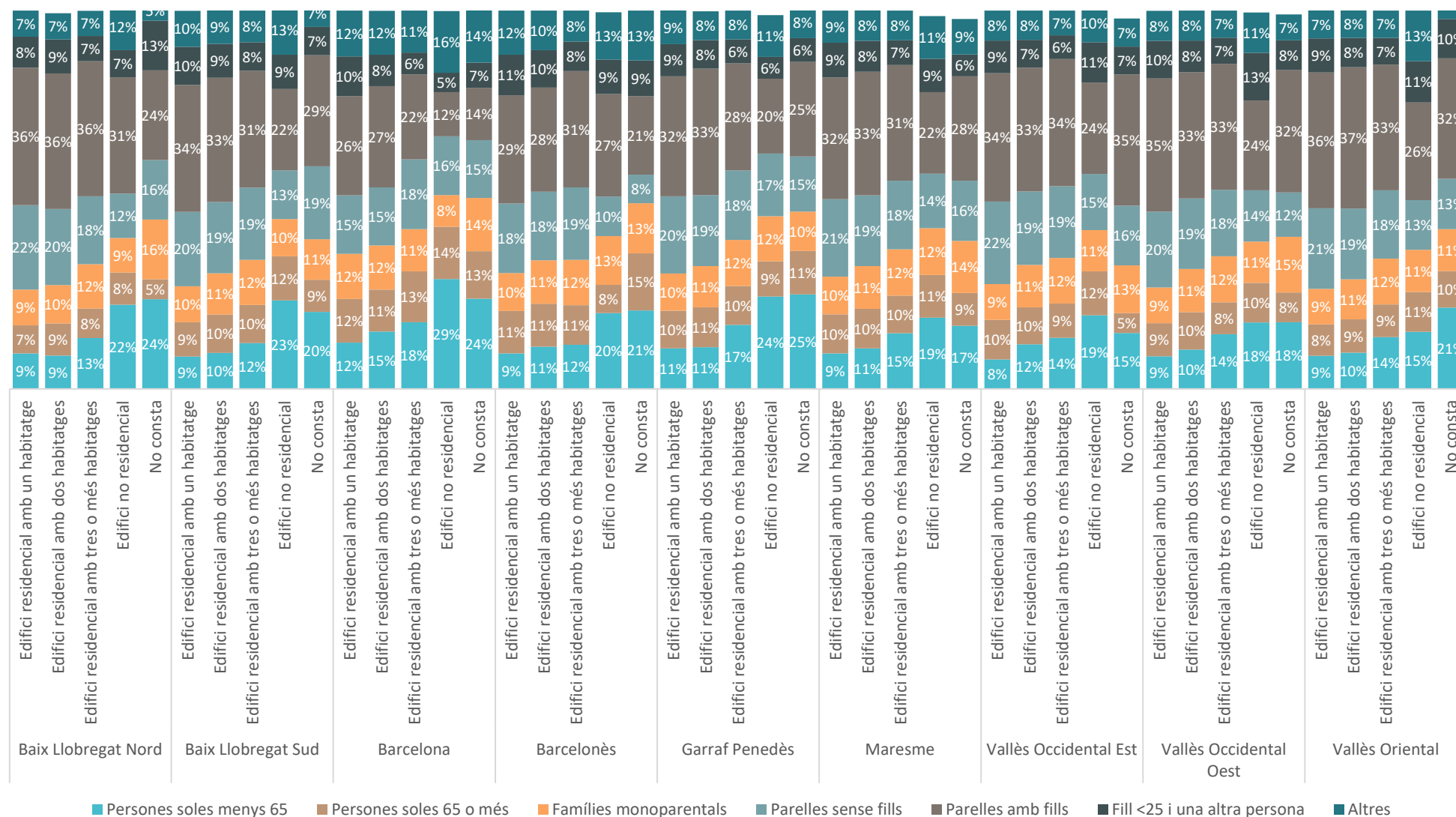
Key points

The housing stock in Barcelona and the surrounding areas (Barcelonès and Baix Llobregat Sud) differs greatly from that found in areas further away from the Catalan capital. The urban environment in Barcelona is characterised by small housing units, mostly built in the 1960s and 1970s, where a small number of people live in cramped conditions. In other areas, however, people are accustomed to enjoying more space, and single-family homes are gaining ground.

The types of families living there are quite similar, with the exception of the city of Barcelona, where single-person households are more common. The characteristics of housing units and household structures are related, with single people opting for smaller housing units and families for larger ones.

The districts of Barcelona city also have their own unique characteristics. In general, most areas show fairly similar figures, but Ciutat Vella and Sarrià-Sant Gervasi are exceptions.

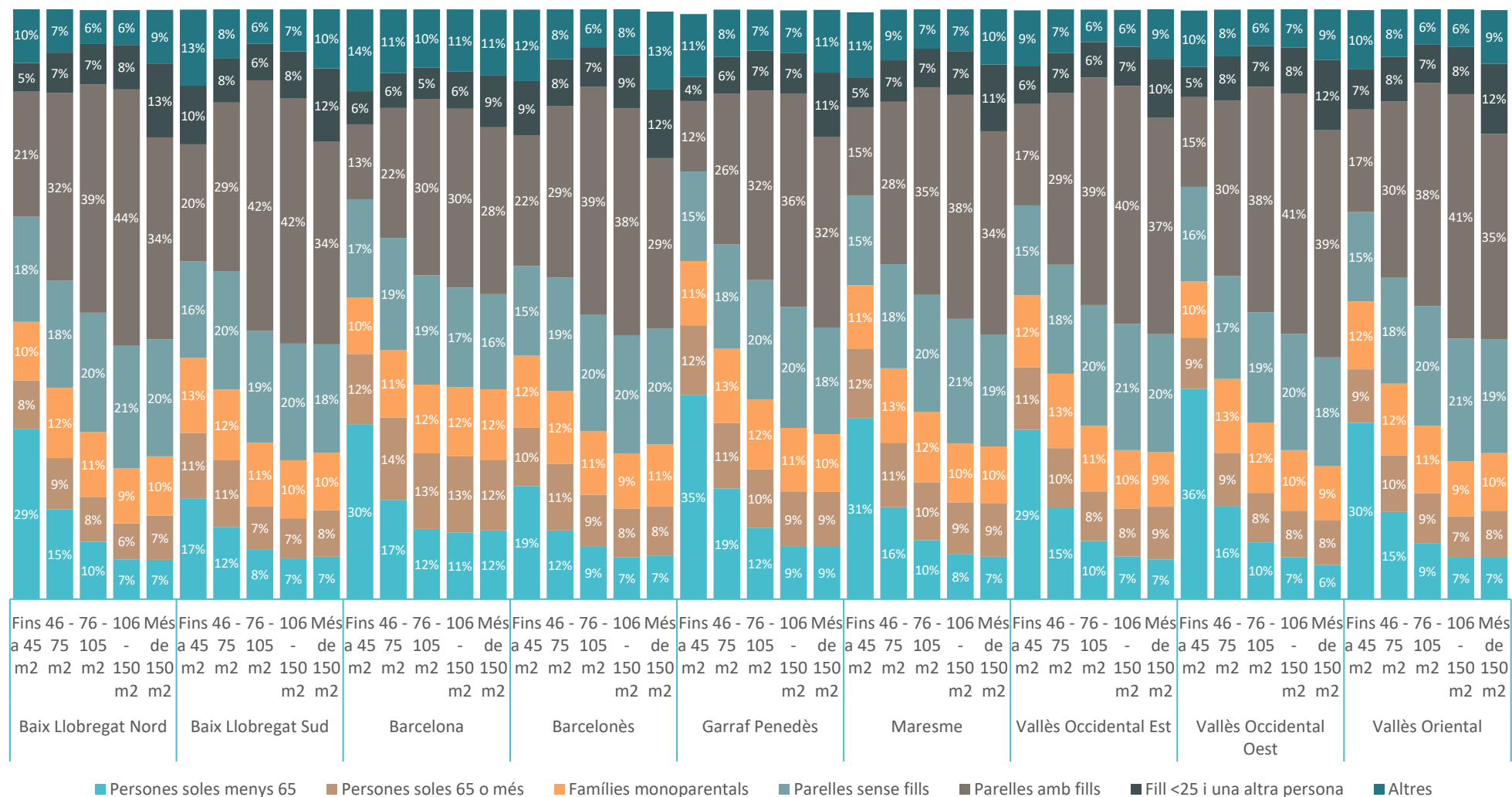
Figure 21: Structure of households by building type and area



Source: Original using data from the INE Population and Housing Census (2021).

Note: Rounding to preserve statistical confidentiality means that the total for some categories may not add up to exactly 100%.

Figure 22: Structure of households by surface area and geographic area



Source: Original using data from the INE Population and Housing Census (2021).

Note: Rounding to preserve statistical confidentiality means that the total for some categories may not add up to exactly 100%.

4. Demographic profile of the inhabitants of the RMB and the relationship with housing on an aggregate level

The demographic profile of a territory provides an understanding of its most basic population composition, and is therefore a basic object of study that can potentially aid in a more in-depth analysis of the population dynamics of an area. Factors such as the demographic pyramid, socio-economic level or place of birth have a direct impact on the composition of the housing stock, and are of great help in understanding population growth or transformation trends. This makes it possible to go beyond identifying current demands and anticipate or outline immediate future challenges.

This section and the following one will investigate the demographic profile of people living in the metropolitan area, analysing the most relevant aspects such as the age groups that make up the different territorial areas, income and place of birth.

4.1. Country of birth and housing unit surface area

The surface area of the housing unit is a key variable for understanding housing dynamics in the territory, as it provides an initial approximation of the population's quality of life. When cross-referencing the housing unit surface area by region of birth, some interesting characteristics can be observed. It should be noted that countries have been grouped based on the simplified regions of the United Nations, as specified in the methodology section.

The sample analysed shows that the vast majority of people (from all countries of birth, with some differences as will be seen later) live in housing units between 60m² and 90m² (68.3% of the total population of the RMB). The remaining population is distributed among flats larger than 100 m² (13.7%), those between 91 m² and 105 m² (8.2%) and those smaller than 45 m² (9.8%).

Firstly, flats larger than 95 m² are mainly concentrated among people born in North America (6.2%) and Oceania (5.6%), the only foreign communities that exceed the national average in this category, which ranks third

(4.8%). The two European regions are only a few tenths behind: the European Union and Switzerland (4.6%) and non-EU Europe (4.6%). At the bottom of the list is Central and South Asia, with only 1.1% of this community living in housing units with these characteristics, followed by Sub-Saharan Africa (1.9%) and North Africa and the Middle East (2.1%). The two remaining regions also fall within this range: Latin America and the Caribbean, with 2.2% of the population living in housing units larger than 95 m², and East Asia and Southeast Asia, with 2.7%.

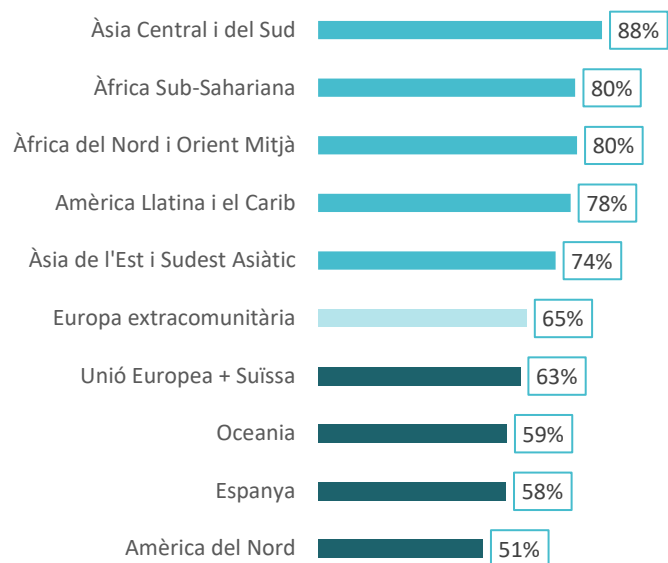
This is how the presence of two separate blocks begins to emerge: the first consists of those regions located entirely within what is known as the “Global North”, with averages ranging between 4% and 6%. Whereas regions located in the “Global South” do not reach 3%. These terms were coined in the mid-1990s and quickly became popular among academic circles. It is a concept that attempts to explain economic, social and political differences at a global level, based on the geopolitical dynamics that shape the current international system. It thus transcends the geographical meaning, reflecting an asymmetrical international system in which the Global North, rooted in historical context, controls most global institutions, as well as cultural hegemony, and hoards a large accumulation of material and resources.

As a general rule, it can be seen that people living in the RMB who were born in the Global South live in more precarious conditions, with less living space both in total and per person. In contrast, people born in countries in the Global North mostly live in larger homes and have more space per person.

For example, while only 51% of people born in North America and 58% of people born in Spain live in housing units smaller than 75 m², these percentages skyrocket to 80% or more for people born in Africa, the Middle East, or Central and South Asia (India, Pakistan, etc.). Between these two extremes are people from non-EU countries (65%).

Figure 23. Percentage of the population of the RMB living in housing

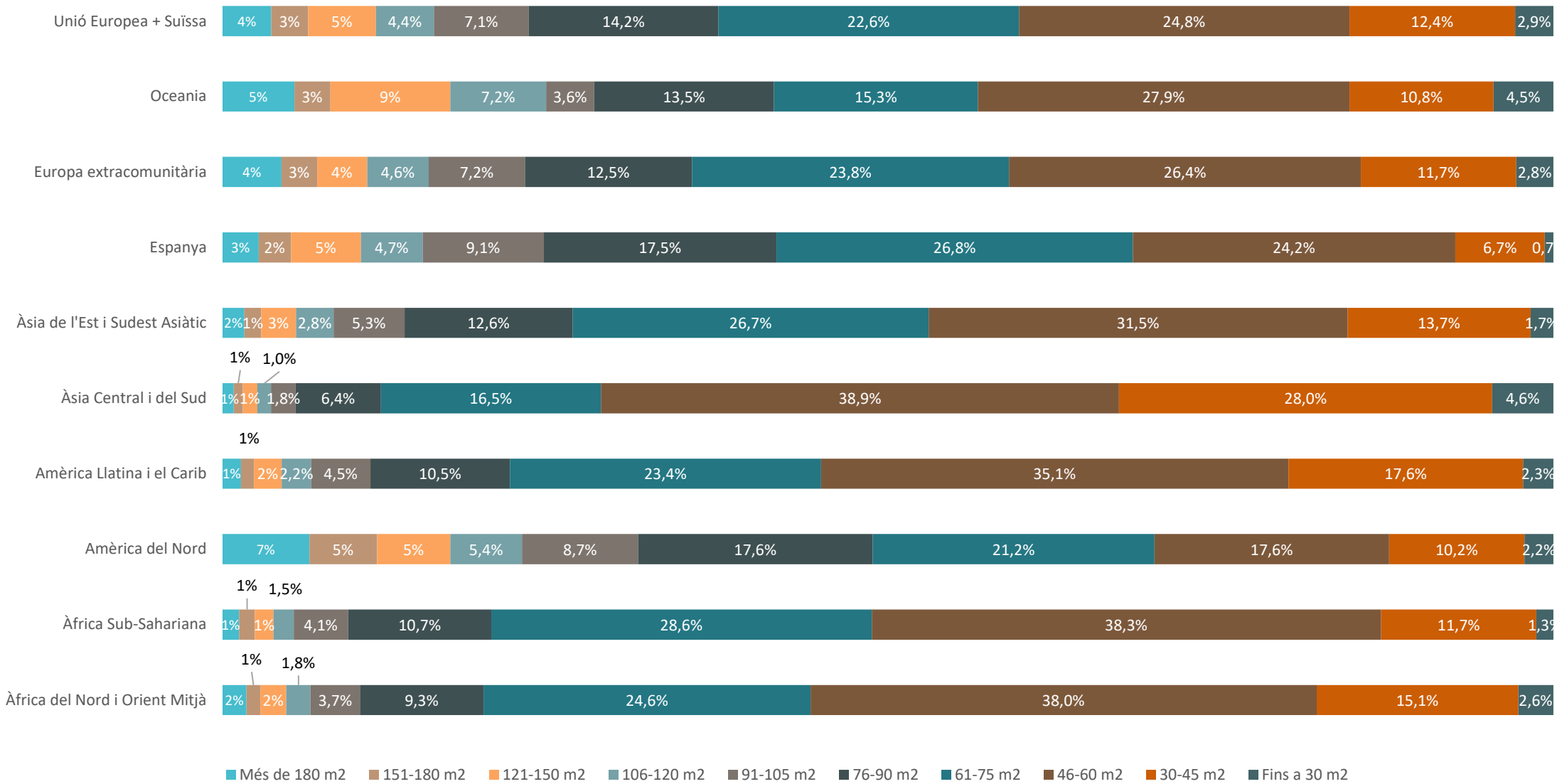
units of less than 75 m², by region of birth (2021).



Source: Original using data from the INE Population and Housing Census (2021).

In general, there is a difference explained by the national context of the regions of origin of the foreign population. The inequalities between the two hemispheres are also reflected in the population of these regions arriving in the RMB, which is also evident in the quality and size of the housing unit.

Figure 24: Distribution of the population born abroad according to housing unit surface area (2021).



Source: Original using data from the INE Population and Housing Census (2021).

4.2. Country of birth and surface area per occupant

The surface area per occupant is perhaps a better indicator for making a realistic approximation of how the population of a territory lives. Broadly speaking, in the RMB, most of the population has between 15m² and 30m² (60%), with significant percentages also living between 10 and 15m² (13.7%) and 40m² and 60m² (11.4%). Fourteen per cent of the sample is located at the ends of the curve (more than 60 m² and less than 10 m²).

As in the previous chapter, the differences between the Global North and the Global South are very significant and go a long way towards explaining the vast majority of differences in terms of surface area per occupant. The most paradigmatic example is that of people who live or coexist in spaces smaller than 10m² per occupant. Only 5.9% of the population in the entire metropolitan area lives in these conditions. In the case of people born in the Global South, this percentage rises to around 24%, with a considerable variation between regions. This means that 39.9% of those born in Central and South Asia live in these conditions, followed by people born in sub-Saharan Africa, 28% of whom live in households of this type. This percentage is lower in the other southern regions, reaching a low of 15.3% for Latin America and the Caribbean. Either way, these figures are significantly higher than those of their northern neighbours, which do not reach an average of 4%.

The differences continue to be very pronounced (although not as intense) in households with between 15m² and 10m² per person, with a difference of more than 10 percentage points between the averages of the different regions (27% in the Global South and 11% in the Global North). In general, the most significant differences are found at the ends of the scale.

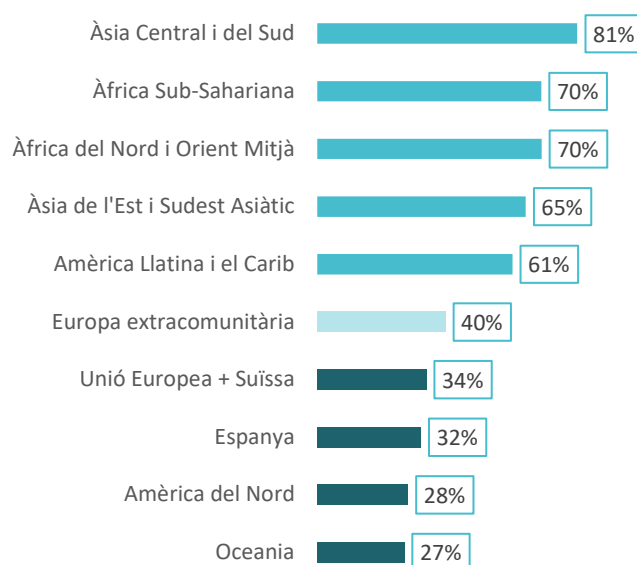
Of the 37% of people in the Metropolitan Region who live in spaces of less than 20m² per person, the vast majority were born in the Global South.

When analysing in detail the percentage of the population in each group with 20 m² or less per person, similar patterns to those in the previous chapter can be observed. Firstly, people born in the Global North rarely have less than 20 m² per person, which accounts for between 27% and 34% of cases. People born in non-EU countries (mainly Eastern European and Balkan countries) occupy an intermediate position, with 40%,

while people from the Global South who have less than 20 m² per person account for between 61% and 81% of cases.

This shows how differences between the “north” and “south” can still be used to explain some of the differences in access to and configuration of housing units. As this is a concept that divides something as complex as global geopolitical and socio-economic reality into two broad groups, it may indeed lead to generalisations that do not accurately reflect the reality. It is a fact that each of these groups consists of very diverse realities that differ greatly from one another, as is ultimately the case with any territorial or collective grouping. In fact, some different behaviours can be found in each of the two groups.

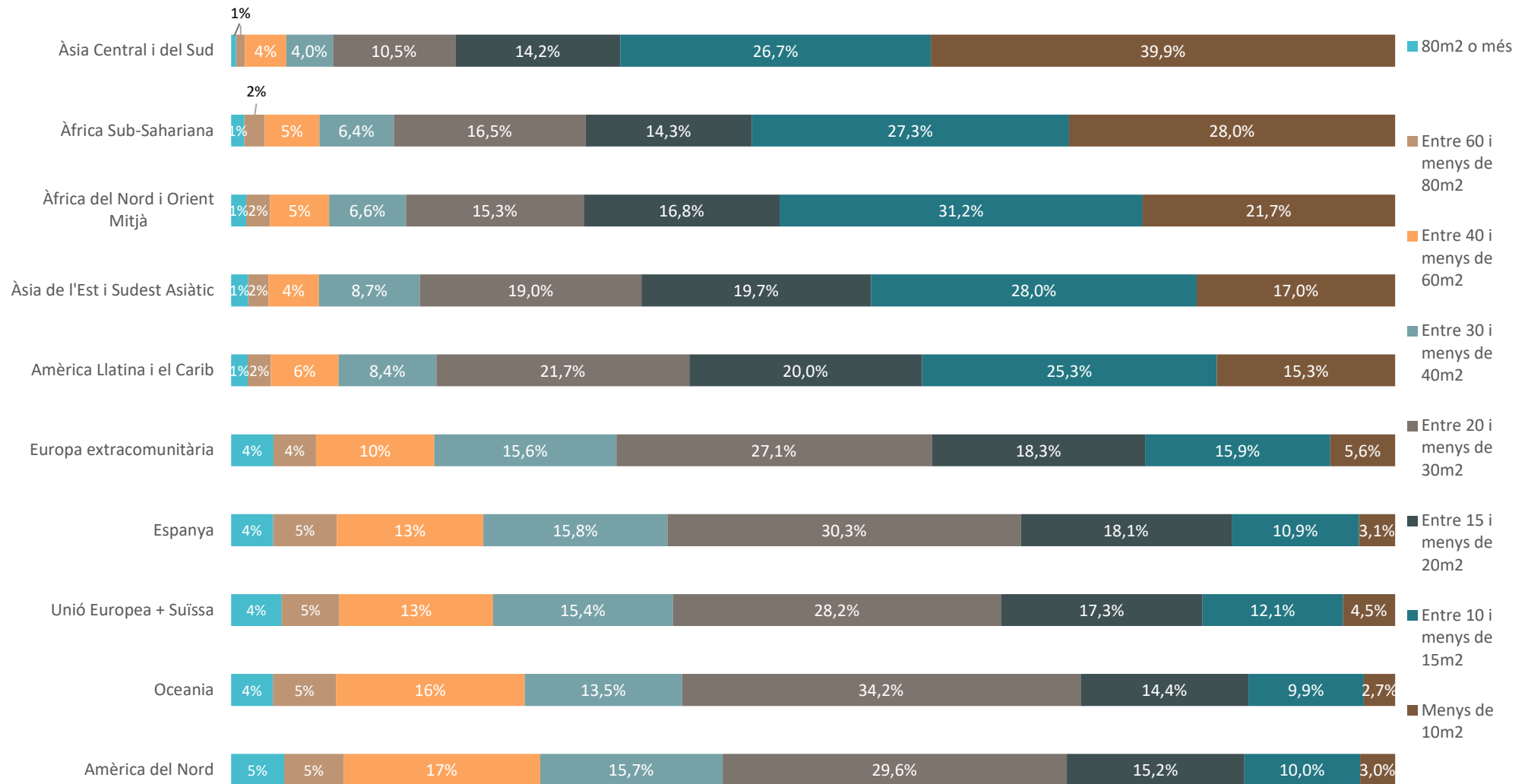
Figure 25. Percentage of the population of the RMB living in housing units of less than 20 m² per occupant, by region of birth (2021).



Source: Original using data from the INE Population and Housing Census (2021).

In terms of surface area per occupant in the metropolitan area, some of the clearest differences are found in the global south block. Specifically, Latin America and the Caribbean, as well as East Asia and Southeast Asia, show considerable disparities with the group comprising Central and South Asia and Sub-Saharan Africa, which appear to be the most disadvantaged in terms of surface area per occupant.

Figure 26. Distribution of the population born abroad according to m² per occupant of their home (2021).



Source: Original using data from the INE Population and Housing Census (2021).

4.3. Housing surface area by age group

Looking at the surface area of housing units by age group (at 10-year intervals), no notable pattern or trend can be discerned. The vast majority of age groups share similar characteristics in terms of surface area, apart from minor fluctuations.

As mentioned above, the vast majority of the population of the Barcelona Metropolitan Region lives in housing units ranging from 46 m² to 195 m² (76% of the total). The most common surface areas are between 46 m² and 60 m² (26% of the total). Internally, there are some differences between age groups, but these do not seem to correspond to any particular trend.

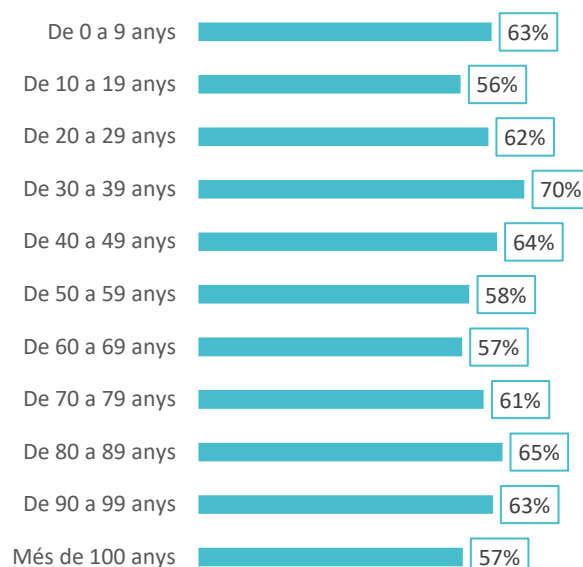
In general, the vast majority of age groups around 25% live in this type of housing, with the most representative group being those *over 100 years old* (35%) and the least represented being those *aged 10 to 19* (22.91%).

In the remaining categories of housing units, the same pattern can be observed, with no clear pattern of behaviour emerging for the differences between age brackets.

When analysing the proportion of each income bracket living in housing units of less than 75 m², no clear pattern emerges, with figures fluctuating between 56% and 70%, with an average of 62%.

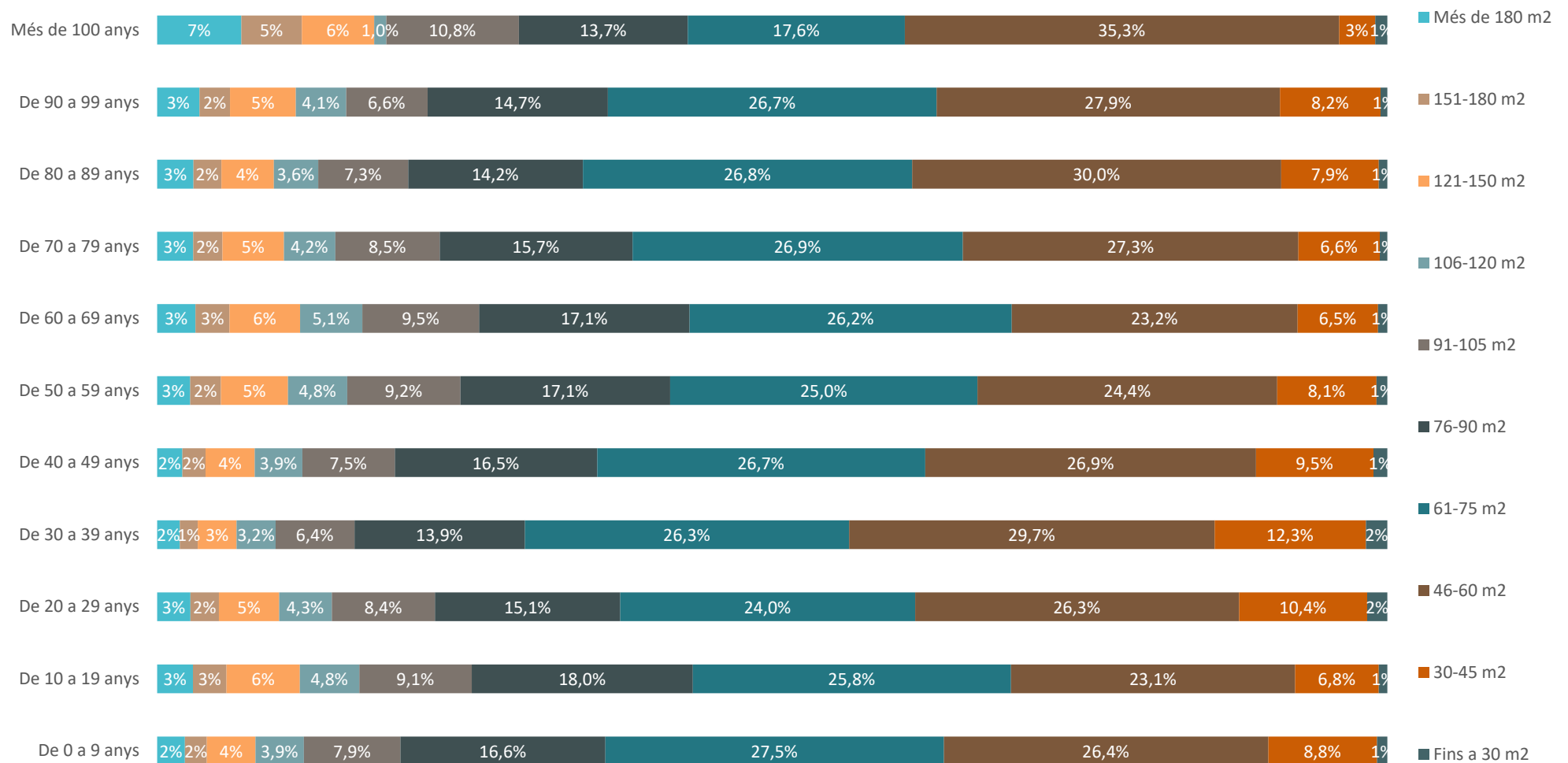
As can be seen in the following section, this absence of trends is due to the fact that the surface area per housing unit fails to reflect certain realities of the housing situation. The surface area of the housing unit only takes into account the space of the home, without counting the members who live there, which is a key element in understanding the dynamics of the housing unit and its quality.

Figure 27. Percentage of the population of the RMB living in housing units of less than 75 m², by age group (2021)



Source: Original using data from the INE Population and Housing Census (2021).

Figure 28. Distribution of age groups in the RMB population according to housing unit surface area (2021).



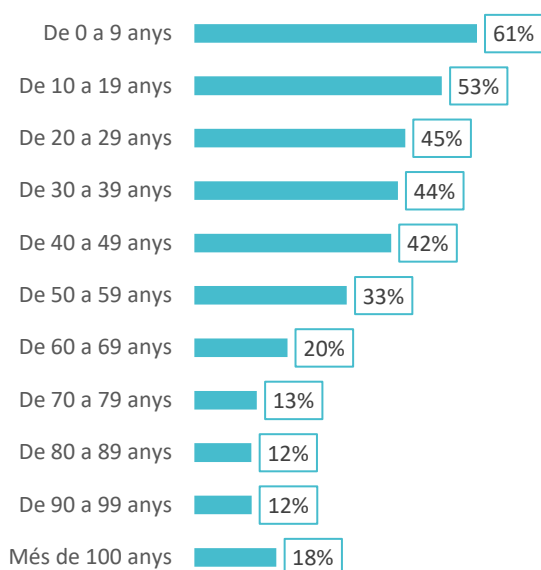
Source: Original using data from the INE Population and Housing Census (2021).

4.4. Age groups and surface area per occupant

Unlike the previous section, studying the surface area per occupant in the different age groups reveals some interesting trends. In general, it can be observed that the older the age group, the more space available per occupant. Conversely, when analysing younger age groups, these tend to have less weight in the larger categories, being overrepresented in those with smaller a surface area per occupant.

A prime example that perfectly illustrates this trend is the population living in spaces smaller than 20m² per occupant. Less than 20% of people over the age of 70 find themselves in this situation, whereas more than half of those under the age of 20 live in households with these characteristics.

Figure 29. Percentage of the population of the RMB with less than 20 m² per occupant, by age group (2021)



Source: Original using data from the INE Population and Housing Census (2021).

Referring to Figure 30, another illustrative case can be seen among people with 80 m² or more per occupant, where an upward trend can be observed as the age intervals increase. The group with the highest representation in the category of surface area per occupant is the *Over 100 years old* bracket (15.7%).

The further one moves away from the ends of the scale,

the more this trend fades, with some variations in the aggregate trend. However, these are residual deviations and do not alter the scenario described above.

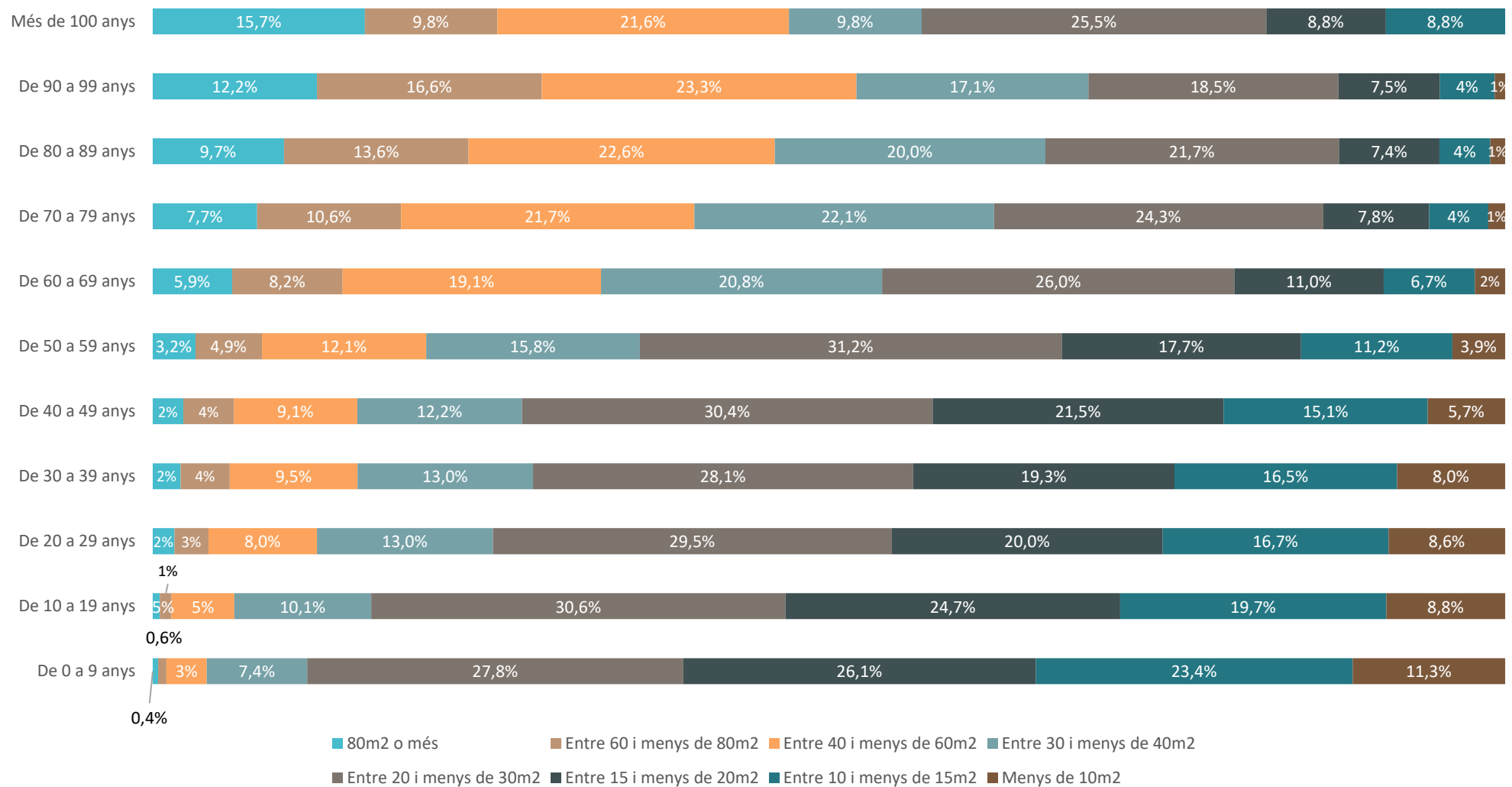
In short, as can be seen, the trend shows that older age groups live in housing units with larger surface areas per occupant, whereas this surface area gradually decreases among younger age groups.

This phenomenon may have several explanations. A first hypothesis could be a "generational opportunity" where the older segments of the population were able to access housing under more favourable conditions than younger generations and therefore currently have larger homes. Unfortunately, this hypothesis can be rejected based on the data in the previous section, where it was seen that age does not have a clear relationship with the surface area of the housing unit.

Another possible explanation is that of the life moment, known in literature as the Life Cycle Theory (Lansing et al., 1964), whereby when young people leave home, they tend to do so with more people sharing the same household (and therefore have fewer square metres per occupant). Subsequently, having children would increase the number of people in the same space (further reducing the square metres per occupant). As children grow up, families tend to move to larger housing units, which leads to an increase in surface area with the same number of occupants. When young people leave the family home, the number of occupants decreases but not the surface area, leading to a substantial increase in surface area per occupant. Finally, many elderly people who have been widowed find themselves living alone in what was once the family home, further increasing the surface area per occupant.

This hypothesis seems to explain the results observed, although it is important to bear in mind that this is a generalisation and does not cover the multitude of forms of cohabitation that exist.

Figure 30. Distribution of the population of the RMB according to square metres per occupant of their home, by age group (2021)



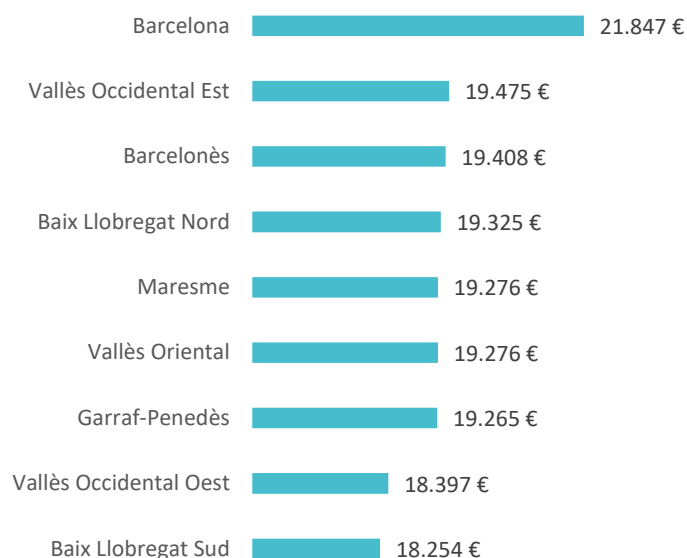
Source: Original using data from the INE Population and Housing Census (2021).

4.5. Disposable Household Income in the Metropolitan Region

Disposable household income is an indicator that measures the income available to the population of a specific territory. This income not only takes into account the income of households linked to remuneration for their work activities, but also includes taxes and social security contributions in the equation. This provides a good indicator for estimating the savings capacity and consumption of households throughout the territory.

The territory with the highest disposable income per household is Barcelona (€21,847) by a considerable margin, with a difference of more than €2,000 from Vallès Occidental Est, which is second by a very narrow margin over third place. The areas of Vallès Occidental Est (€19,474), Barcelonès (€19,408.47), Baix Llobregat Nord (€19,325), Maresme (€19,276), Vallès Oriental (€19,275) and Garraf-Penedès (€19,264), fluctuate between similar figures, with very little difference between areas. On the other hand, Vallès Occidental Oest and Baix Llobregat Sud are areas that fall slightly below the ranges discussed, at around €18,300.

Figure 31. Available household income by area in the Barcelona Metropolitan Region (2021)



Source: Original using data from IDESCAT (2021).

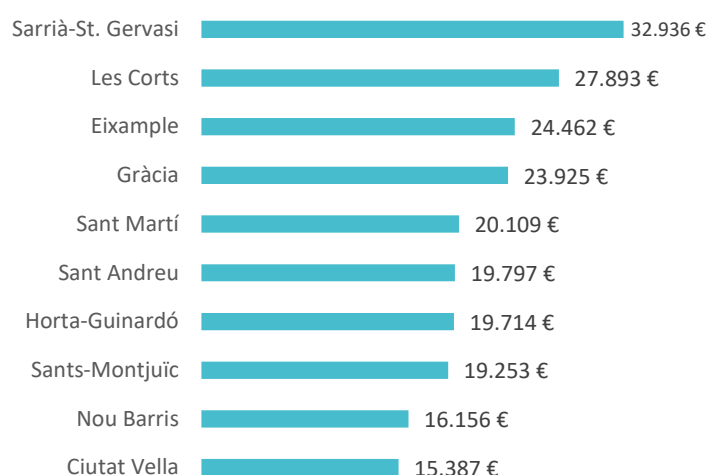
4.6. Disposable household income in

Barcelona

The Catalan capital, due to its population and because it is the backbone of economic activity in Catalonia, is highly complex and presents very different housing dynamics depending on the neighbourhood or district. This means that Barcelona, despite having one of the highest disposable incomes in Catalonia, shows considerable disparities when broken down by district. The variable selected is derived from disposable household income per person, extracted from Barcelona Data Portal.

As a result, the district with the highest income (Sarrià-Sant Gervasi) has twice as much as the district with the lowest income (Ciutat Vella), a significant difference that translates into radically different lifestyles and housing dynamics. In comparison with the RMB, Ciutat Vella and Nou Barris (the two districts with the lowest income in Barcelona) are considerably below the most vulnerable territorial areas (around €2,000). At the other end of the scale, Sarrià-Sant Gervasi (€32,936), Les Corts (€27,893), L'Eixample (€24,462) and Gràcia (€23,925) are areas with significantly higher purchasing power than the rest of the metropolitan region. The districts of Sant Martí (€20,109), Sant Andreu (€19,797), Horta-Guinardó (€19,174) and Sants-Montjuïc (€19,253) are close to the metropolitan average, with very similar figures.

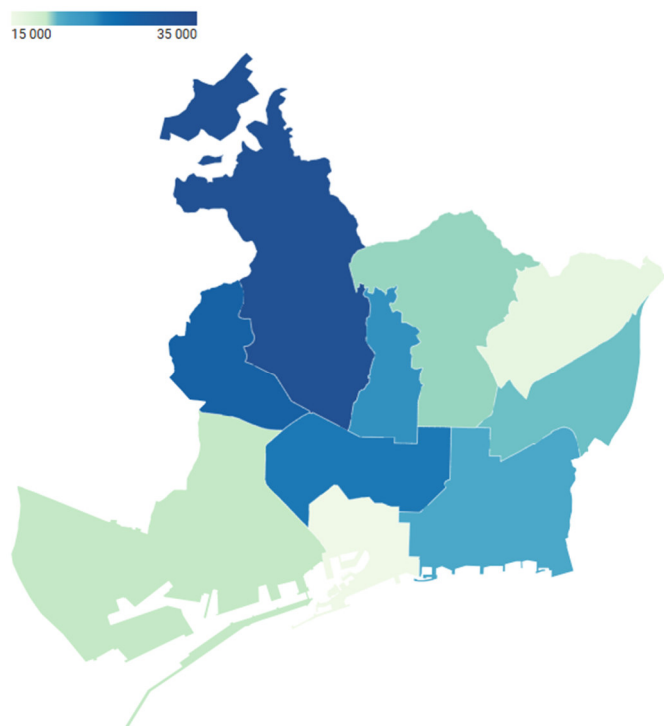
Figure 32. Disposable income per household per person in Barcelona, by district (2021).



Source: Original, using data from the Barcelona Data Portal (2021).

Figure 33. Map of disposable income per household per person in

Barcelona, by district (2021).



Source: Original, using data from the Barcelona Data Portal (2021).

Key points

People born in Asia, Africa and Latin America live in smaller housing units, both in absolute terms and in relation to the number of people living there. In contrast, European regions, Oceania and North America do not show significant differences from the national population.

The age of the people does not have an effect per se on the total surface area of housing units but it does on the surface area per occupant. As people get older, they tend to have more space per person.

The city of Barcelona is the area with the highest disposable income, with a difference of more than €2,000 compared to the rest. Baix Llobregat Sud and Vallès Occidental Oest stand out at the bottom of the scale.

Within the city of Barcelona, Sarrià-St. Gervasi and Les Corts stand out in terms of disposable income, while Nou Barris and Ciutat Vella are at the bottom of the list.

5. Demographic profile and its relationship with housing by territorial areas

5.1. Foreign population and housing unit surface area

In order to analyse the intersection of housing unit variables with demographic profile variables for each metropolitan area, a limit of 75 m² has been established, this being the approximate value found around the central value of the distribution. This allows the differences between areas and demographic profiles in terms of housing unit characteristics to be visualised.

There are considerable differences when comparing the situation of each group in different territorial areas. The first aspect to highlight is that the highest levels of people living in housing units smaller than 75 m² are concentrated in the urban areas of Baix Llobregat Sud – Barcelona – Barcelonès, while the percentage of people born abroad living in these conditions decreases as the distance from the capital increases. It is for this reason that both the Catalan capital and the surrounding areas (Barcelonès and Baix Llobregat Sud) tend to be areas where there is a higher percentage of people living in smaller housing units than in other neighbouring areas, such as Garraf-Penedès or Vallès Oriental.

The average population living in homes smaller than 75 m² in Barcelona and Barcelonès is 81%, although there are differences between groups born abroad, reflecting economic disparities between the Global North and the Global South.

These trends are quite widespread, albeit with particular characteristics for each group of foreign origin. For example, people born in the European Union and Switzerland consistently have the lowest percentages of housing units smaller than 75 m², but these percentages increase in the three areas mentioned above. Conversely, people from Central and South Asia tend to have a high percentage of housing units smaller than 75 m², reaching around 90% of the population in some areas such as Baix Llobregat Sud, Barcelona and Barcelonès. In a way, this pattern is true for all regions of origin, where **the highest levels are found in the 'central' areas, while they decrease in the rest of the RMB.**

Even so, not all behaviours are the same as in the rest of the Metropolitan Region. Some regions of origin account for up to 40-50% of housing units of less than 75 m² in the areas of Garraf-Penedès, Maresme, Vallès Occidental Est and Oest, and Vallès Oriental, while others remain at levels of between 70-80%. It is interesting to explore precisely these differences, even though, as a general rule, regions comparable to the Global North tend to be better off than those in the Global South.

Nevertheless, the Global North category includes some countries from the Asian community, specifically Japan and South Korea, which may explain the better results in East Asia and Southeast Asia.

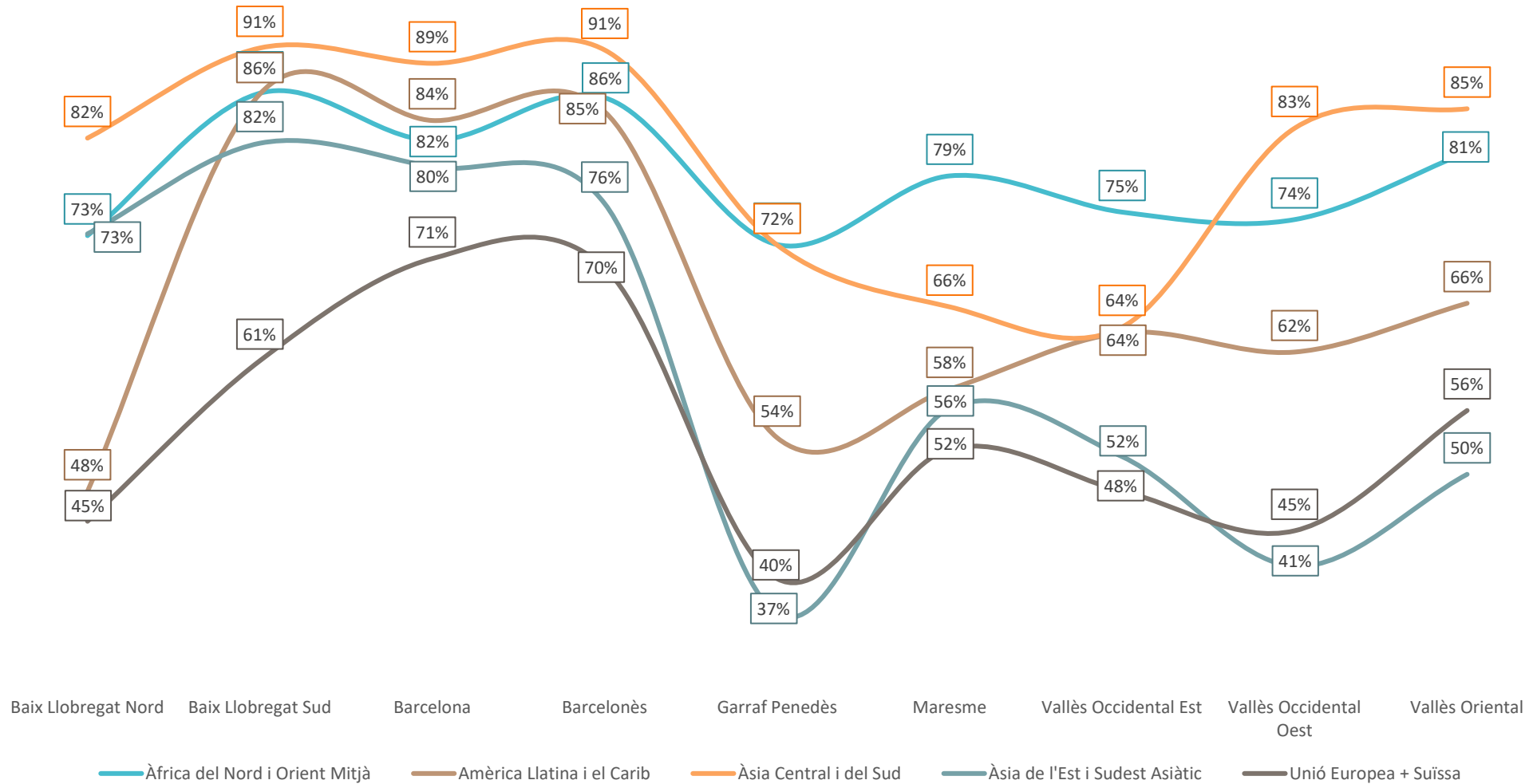
A particularly interesting case is that of the Latin American community, which is situated at an intermediate point between migration from the Global North and the Global South. In the most central areas of the RMB, there are high levels of concentration in housing units of 75 m² or less, around 85% (similar to regions such as Central and South Asia, North Africa and the Middle East), while the rest have intermediate levels and even levels similar to those of more developed regions. This is due to the fact that migration from Latin America and the Caribbean has a longer history in Catalonia than migration from other regions of the world, and there are fewer linguistic and cultural barriers, which would allow for a more favourable situation in terms of access to housing.

From a territorial point of view, areas outside the urban continuum tend to have a larger surface area per occupant. Garraf-Penedès is the region with the highest percentage of people living in housing units larger than 75 m², with only 55% of residents living in housing units smaller than this size.

In the remaining areas (Baix Llobregat Nord, Maresme, Vallès Occidental Oest, Vallès Occidental Est, Vallès Oriental), the average number of people living in housing units smaller than 75 m² ranges between 61% and 68%, repeating the distribution pattern mentioned above. The community with the fewest people living in these conditions is the European Community, followed by the East Asian community. Even with an even higher percentage, there are people born in the Global South who also follow the same pattern in most cases. Latin America typically ranks third, followed by North Africa and finally Central Asia, which in virtually all areas is the group with the highest number of people living below the poverty line (an average of 80%).

As mentioned above, a **pattern is replicated whereby people born in the European Community tend to live in housing units with a larger surface area**. Communities in the Global South, particularly in Central and South Asia, North Africa and the Middle East, have the smallest living spaces. Based on this cross-cutting dynamic, the distribution changes depending on the area studied, with Barcelona and Barcelonès being the regions with the smallest housing unit surface area due to their higher population density. Precisely due to this density, the differences between regions of birth are less pronounced in these areas. However, in areas where there is a lower percentage of people living in homes smaller than 75 m², the disparities increase considerably.

Figure 34. Foreign population living in housing units smaller than 75 m², by territorial area.



Source: Original using data from the INE Population and Housing Census (2021).

5.2. Foreign population and surface area per occupant

If in the previous section there were already considerable disparities between those born in foreign countries, these become more pronounced when analysed per occupant, a variable that presents a more accurate picture of the reality of housing situation. This is how the two dynamics mentioned in the previous section intersect. Firstly, there is a territorial pattern which consists broadly of a higher concentration of population in the city of Barcelona and its surrounding areas, characterised by relatively small spaces with difficulties for growth due to the geographical limitations. Outside the metropolitan area, the population is more dispersed across the physical space. As can be seen in Figure 35, this means that the population is concentrated in smaller housing units in the Baix Llobregat Sud, Barcelona and Barcelonès areas. It is important to note, however, that in terms of surface area per occupant, there is on average less available space in Barcelonès (67%) and Baix Llobregat Sud (69%) than in the capital itself (61%). In contrast, this pressure is lower in other areas.

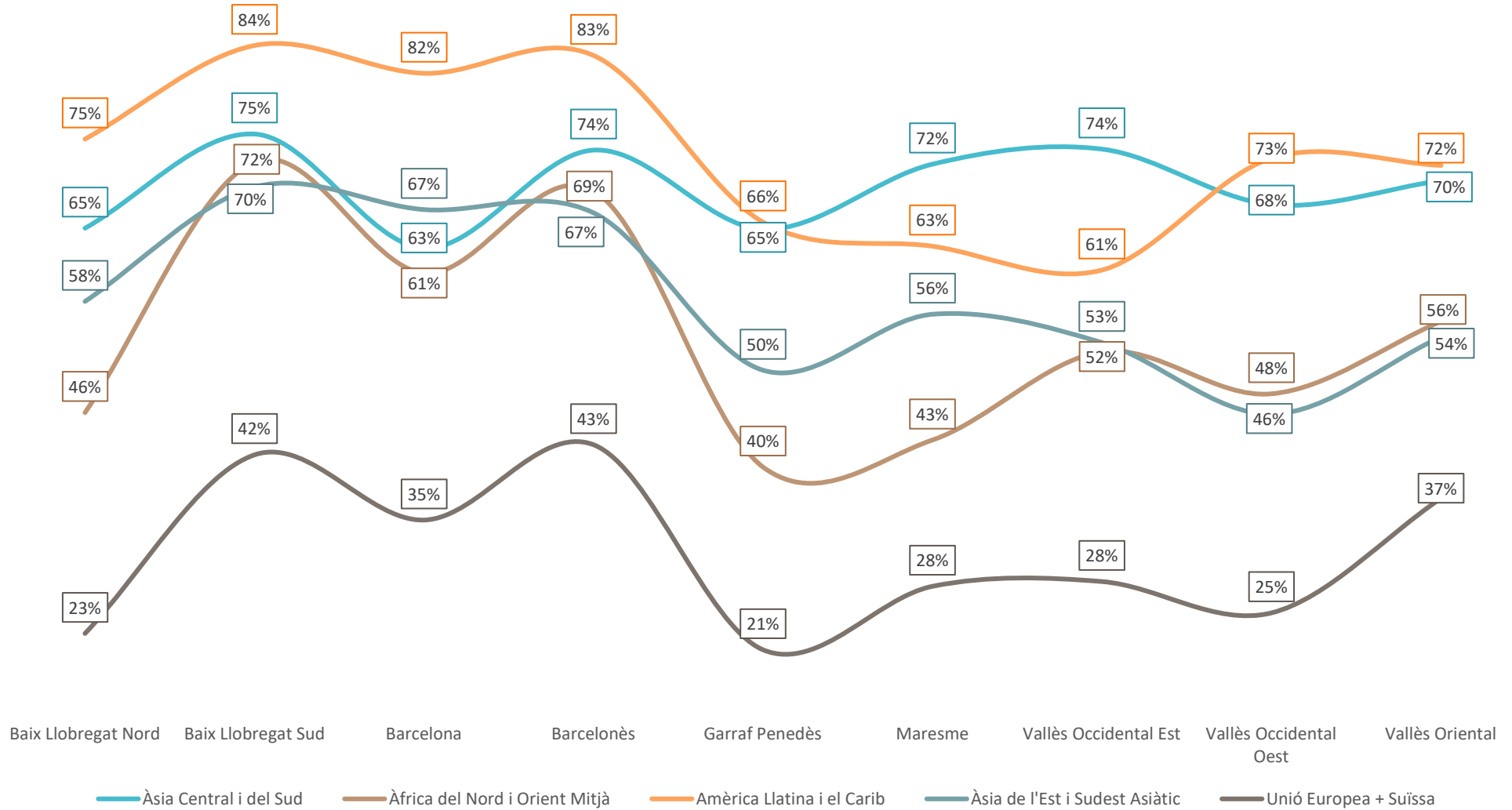
This trend coexists with international socio-economic dynamics between “north” and “south”, which means that the profile of people born in foreign countries is vastly different within the social structure, which largely determines the type of housing they have access to. In this case, this variable produces more significant differences than territorial dynamics, which, although still present, are not as pronounced as in the previous section.

The surface area per occupant provides a more accurate picture of the situation and quality of the housing unit, at least in terms of space. It is also possible to discover certain realities that remain hidden when only the housing unit surface area is studied. One of the elements that does not change (and in any case is only reinforced) is the percentage of people born in the European Community living in relatively small surface areas, in this case in housing units of less than 20m² per occupant. The percentage in this community is remarkably low, especially when considering sparsely populated areas such as Garraf-Penedès (21%). In other areas such as Vallès Occidental Est, Vallès Occidental Oest, Maresme and Baix Llobregat Nord, the figure is around 26%. In the case of Barcelona, Barcelonès and Baix Llobregat Sud, the percentage ranges between 35% and 43% depending on

the context mentioned above. Meanwhile, in the southern communities of the Catalan capital and its surroundings, the percentage rises to 84% in most cases (Latin America and the Caribbean), stabilising between 67% and 70% in the remaining southern communities.

The only community that does not seem to be affected by territorial dynamics is Central and South Asia, which remains relatively stable across all territories, with around 70% of the population born in this region living in flats smaller than 20m². It is in Barcelona (63%), where the lowest percentage of this population lives below the poverty line, which actually contradicts the territorial trend outlined above.

Figure 35. Foreign population and surface area per occupant, by territorial area (2021)



Source: Original using data from the INE Population and Housing Census (2021).

5.3. Housing surface area by age group

By cross-referencing the surface area of housing units with the age of their occupants and breaking this down by metropolitan area, certain differences can be observed in terms of both territory and age.

Firstly, Barcelona and its immediate surroundings (Baix Llobregat Sud, Barcelona and Barcelonès) stand out in the metropolitan area for the high percentage of people living in housing units of 75 m² or less, with no significant differences between the different age groups, with the possible exception of older people (aged 80 or over) in the Barcelonès area, who are in a better situation in comparison with the other areas of the territory. This is consistent with the higher population density in the municipalities in these areas, which inevitably limits the availability of larger housing units.

Outside these three areas, the situation changes radically, with the number of people living in housing units of less than 75 m² falling by a third or more. In other areas, there are some differences between age groups, with a greater tendency for people between the ages of 20 and 39 to live in smaller housing units overall.

The opposite of this trend is a lower frequency of people aged 60 to 79 living in housing units of less than 75 m², although it should be noted that the differences between these two age groups are not very pronounced, ranging from 7 to 12 points depending on the area.

To a certain extent, these data show the same pattern observed in the surface areas per occupant, where the life cycle would determine the characteristics of the housing unit.

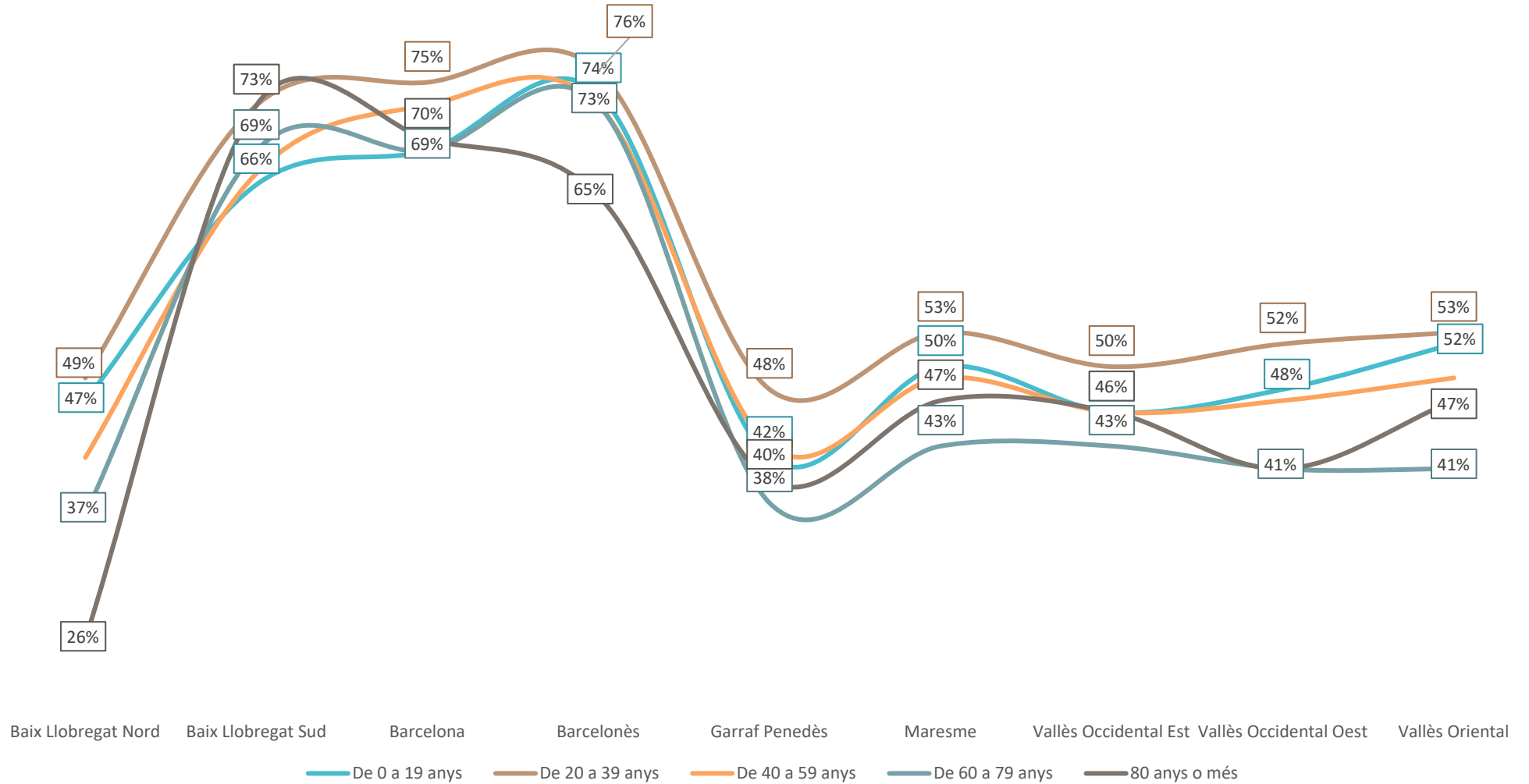
However, in this case, the “generational opportunity” hypothesis gains strength when the remainder of the RMB is isolated from the areas of Baix Llobregat Sud, Barcelona and Barcelonès. If analysing the aggregated data allowed this hypothesis to be ruled out, it must be reconsidered when disaggregating the data by area.

A very striking example is that of Baix Llobregat Nord, where the difference between people aged 20 to 39 and those aged 80 or over is 23 percentage points. The proportion of young people living in housing units of 75 m² or less is twice that of older people.

In short, an analysis of this data disaggregated by area

and age group leads to two conclusions. Firstly, the demographic weight and characteristics of the Baix Llobregat Sud, Barcelona and Barcelonès areas conceal a more diverse reality when the data is aggregated. Secondly, outside these three areas, there does seem to be a certain stratification by age in terms of living space, with younger people more frequently living in smaller housing units than older people.

Figure 36. Age groups and surface area per housing unit, by territorial area (2021)



Source: Original using data from the INE Population and Housing Census (2021).

5.4. Age groups and surface area per occupant

As expected, the differences between age groups that emerged when analysing the surface area by age and area are even more pronounced when analysing the surface area by occupant. This analysis reveals broad trends, such as the fact that older age groups tend to have more surface area per occupant. Possible explanations for this phenomenon have already been discussed in section 5.4. *Age groups and surface area per occupant*; as the youngest members of the family leave home and the oldest reach the end of their lives, the remaining members have more space. This is in contrast to the younger segments of the population, who live in family homes in almost all cases, resulting in less space per occupant. This would explain the enormous difference between the 0 to 59 age group and the 60 to over 100 age group. In the case of the 20-29 age group, difficulties in accessing housing mean that emancipation is slow and often marked by years of sharing a home with other people (both family members and non-family members).

With regard to the territorial areas discussed, the same housing dynamics continue to prevail: the highest population concentration and density in Barcelona, Baix Llobregat Sud and, above all, in Barcelonès, leads to higher housing density, whereas a lower population and density in the rest of the areas leads to lower levels of population in housing units with 20 m² or less per occupant.

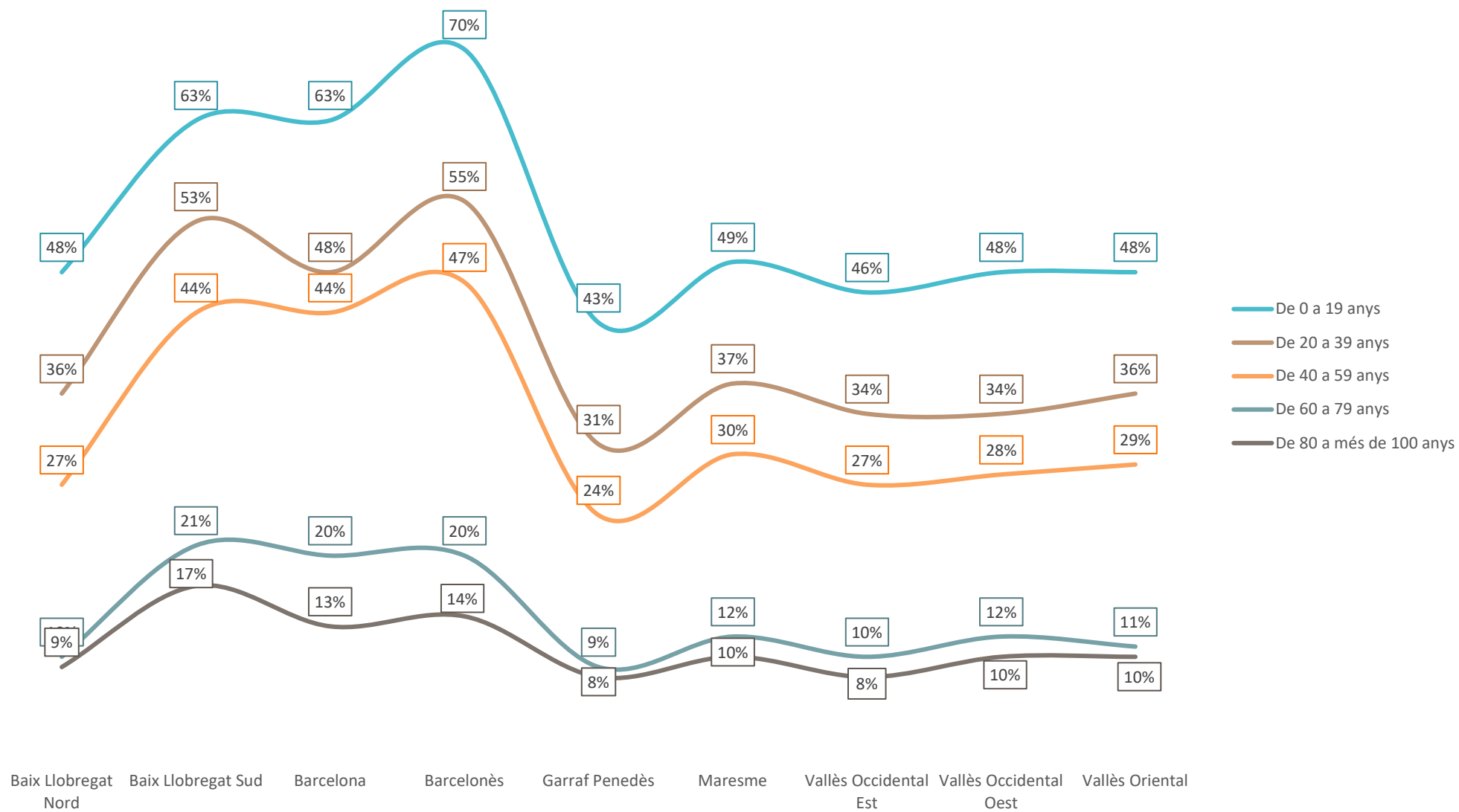
Key points

People from communities in the Global South tend to live in smaller housing units than those born in the European Union, although areas with higher population densities blur these differences.

If the surface area per inhabitant is analysed in all areas, even the most densely populated ones, there are noticeable differences between the European Union and the Global South.

No significant differences in total surface area were observed in Barcelona or in the surrounding areas according to age, although differences do exist when analysing surface area per occupant, which increases with age.

Figure 37. Age groups living in housing units smaller than 20 m² per occupant, by territorial area (2021).



Source: Original using data from the INE Population and Housing Census (2021).

6. Population movements

People move house throughout their lives for different reasons, often in search of better living conditions, but sometimes forced to do so by external factors. This section looks at why people in the RMB decide to move, their profile, the consequences of moving, and the direction of the move.

6.1. Change of residence in the period 2018-2027

The Urban Cohesion Survey (conducted in 2022) provides information on the percentage of people who plan to change their place of residence in the next five years, as well as the year they moved into their current home. In order to maintain temporal consistency, it has been decided to use a period of five years prior to the survey and five years after, to cover the period 2018-2027.

By extrapolating the sample to the population of the three areas (Barcelona city, the rest of the AMB and the rest of the RMB), it can be seen that, broadly speaking, a significant proportion of the population expects to change their place of residence in the five years following the survey (Figure 38). However, the percentage does vary depending on the area, with Barcelona having the highest percentage at 35.5%. According to data from the Metropolis Institute, this represents an increase of 12.6% compared to figures from 2017. The results for the rest of the AMB are slightly lower, at 29%, representing an increase of 5.8% compared to 2017. Meanwhile, the rest of the RMB stands at 25.8%, 2.8% up on five years earlier.

Figure 38. Percentage of the population of the RMB that plans to change their place of residence in the next five years (2022).



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

With regard to the five years prior to the survey (Figure 39), slightly lower figures than the previous ones can be observed for two of the areas. 30.4% of the population of the Catalan capital has moved in the last five years, while in the rest of the metropolitan area only 23.1% have done so. While the outer ring of the RMB (the part that does not belong to the AMB) is expected to show some continuity with previous periods, the survey points to an increase in residential mobility in both Barcelona and the AMB.

Figure 39. Percentage of the population of the RMB that has changed their place of residence in the last five years (2022).



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

If we combine the changes in the last five years and the forecast for the next five years (Figure 40), we can see that around half of the population in each area has moved or plans to move between 2018 and 2027. The city of Barcelona is particularly affected by significant changes in housing, being the only area where **more than half of the population (50.7%) is expected to change their place of residence during this period.**

The main difference between the Catalan capital and the other two areas is the weight given to people who have recently moved and plan to do so again. These represent 14.9% of the population of the Catalan capital but only account for 9.1% and 8.5% of the rest of the AMB and the RMB, respectively.

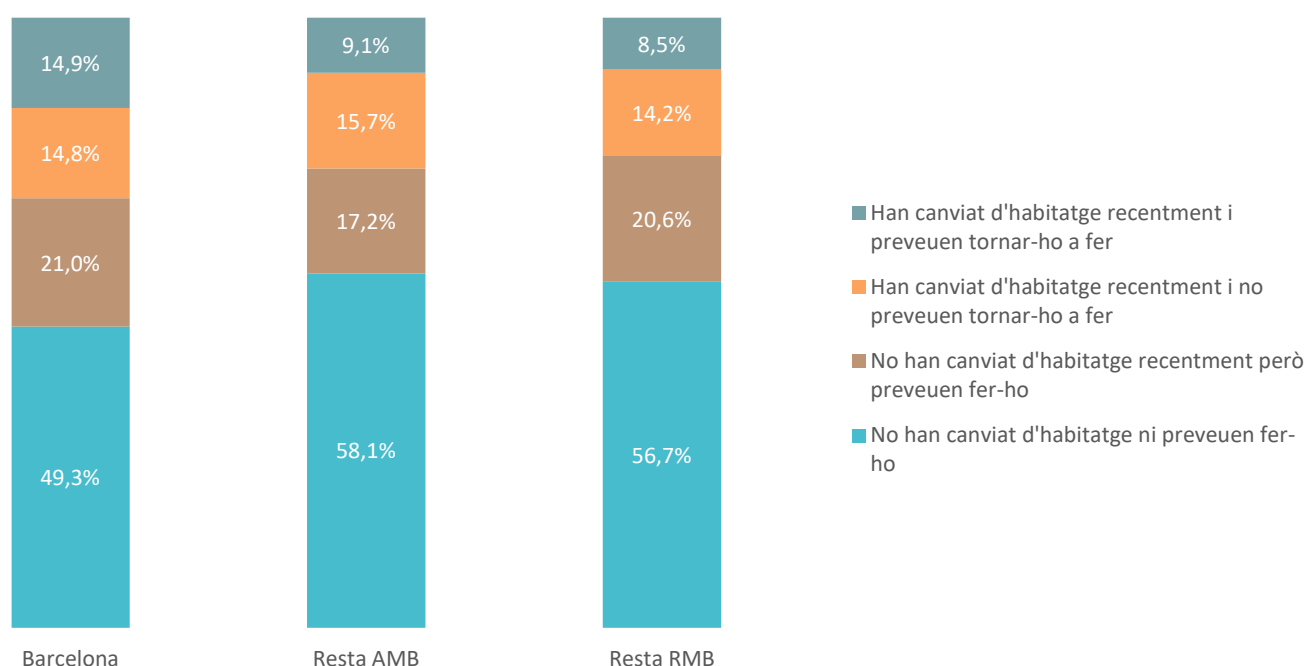
People who have moved in the last five years and do not plan to do so again account for around 15% in all areas. That said, the number people who have lived in their current home for more than five years but plan to move within the next five years is higher in Barcelona (21%) and the rest of the metropolitan area (20.6%).

In conclusion, the figures show a high rate of change of residence throughout the Metropolitan Region, with particularly high figures in Barcelona, where it is expected that during the period analysed more than half of the population will change their place of residence. The situation is particularly difficult for the 15% of Barcelona residents who plan to move home twice in just ten years, with the difficulties that this can entail in terms of stability and settling in the area.

residence, the most frequent being the desire to improve one's own home or surroundings. This reason accounts for 34.7% of changes in residence in Barcelona and approximately 40% in the rest of the AMB and RMB.

The second most common reason is to start a family or other family-related circumstances, accounting for 28.2% of changes of residence in the Catalan capital and 27% in the rest of the metropolitan area (Figure 41). In

Figure 40. Distribution of the population according to possible scenarios of change of residence



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

The situation is very similar in the rest of the metropolitan area. Although the percentage of people who do not plan to change their place of residence during the period analysed is lower than in the Catalan capital, almost half of its inhabitants will change their place of residence during the period studied – figures that remain very high.

The following sections explore the possible reasons why residents of the three rings might want to change their place of residence and whether the profile of these people differs from that of people who remain in the same home and plan to do so in the future.

6.2. Reasons for moving

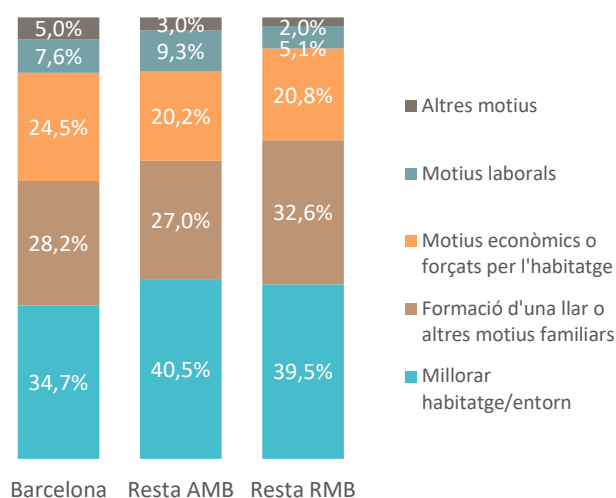
The reasons for moving house (or planning to do so) have been grouped into five categories, in line with the classification of the Metropolis Institute. In general, there are three main reasons for changing one's place of

the rest of the RMB, however, the percentage rises to 32.6%, a significant difference compared to the other two areas. This fact suggests that it is more difficult for people in the AMB to change their place of residence when starting a family.

Economic reasons or being forced to move (due to housing-related issues, e.g., demolition, eviction or non-renewal of the lease) account for 24.5% of the changes in the city, while in other areas the figure is just over 20%.

Changes in residence for work-related reasons account for between 5% and 10% depending on the area, and do not occupy a predominant position, as is the case with other reasons, which remain at 5% or below.

Figure 41. Reason for changing residence in the last five years (2022).



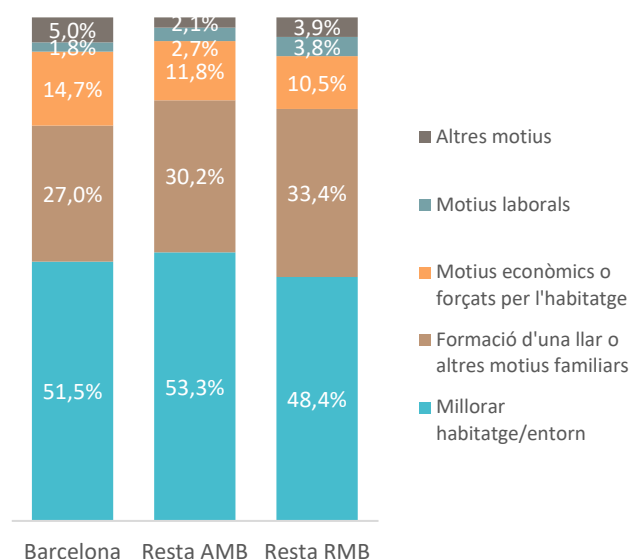
Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

With regard to plans to change residence in the next five years (Figure 42), significant differences can be observed compared to the previous graph. Firstly, around half of those planning to move house do so in order to improve their own housing situation or their surroundings. This represents a 16.8% increase among people who have recently moved to the capital, 12.8% more in the rest of the AMB and 8.9% in the rest of the RMB.

Moving house to start a family or for other family reasons remains at similar levels to those seen over the last five years, standing at 27% in Barcelona, 30.2% in the Metropolitan Area and 33.4% in the Barcelona Metropolitan Region.

The other major difference lies in the economic reasons or the fact of being forced to move, which carries less weight in the forecasts than in the last five years. In Barcelona, where the trend was more pronounced in previous years, only 14.7% of the total population plans to move (compared to 24.5% who have already done so). The same effect is seen in the rest of the AMB (11.8% forecast compared to 20.2% in the last five years), which is also true for the rest of the RMB (10.5% compared to 20.8%).

years (2022).



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

In conclusion, there are various reasons for changing residence in the Barcelona Metropolitan Region, with the main reason for both the forecasts for the next five years and the reality of the last five years being to improve housing or the surrounding area. Starting a family or other family reasons ranks second, while economic reasons is third.

There are **considerable differences between past reality and future forecasts**. A large part of the population plans to move home to improve their living conditions, although those who plan to do so for economic reasons are not as numerous as those who have actually done so in the last five years. This could indicate a change in the reasons behind the changes, or that **part of the population, especially in the Catalan capital, is being forced to relocate for reasons other than those planned or desired**, such as economic or work-related reasons.

6.3. The profile of people who

Figure 42. Reason for planning to change residence in the next five

change their place of residence

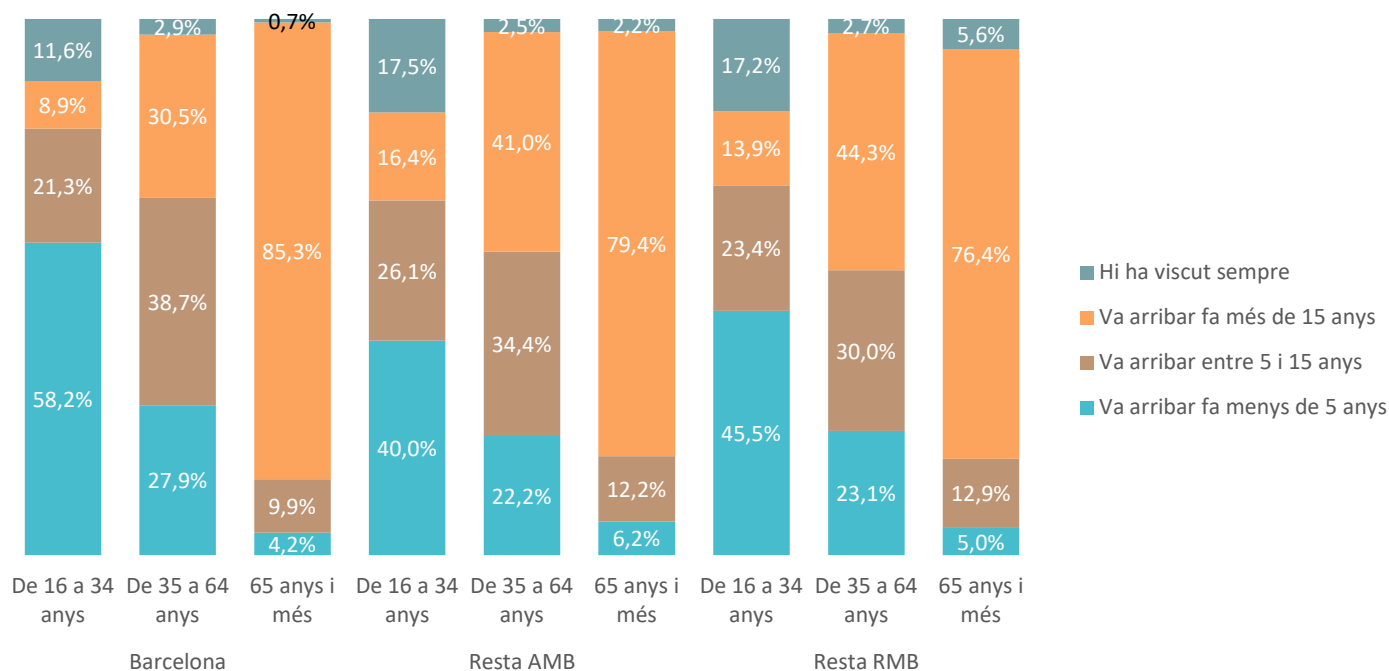
The year of arrival at the home is strongly linked to age (Figure 43). Within the younger people group, the largest group is those who arrived at their current home less than five years ago. The percentage is particularly high in Barcelona, where 58.2% of young people have moved home in the last five years, although this category also features prominently in other areas. In the middle-aged group (35-64 years old), we find a fairly even distribution among the categories (except for those who have always lived there), which is normal considering the wide age range within the group, whereas the vast majority of older people arrived more than 15 years ago, with a particularly high percentage in Barcelona, at 85.3%.

Generally speaking, Barcelona stands out once again for

groups, bearing in mind that people over 65 rarely move for work-related reasons. The percentages are therefore quite similar to those seen previously with all age groups combined. The group with the most unique characteristics is the elderly, such as the high percentage who moved to improve their housing or surroundings in Barcelona or for family reasons to the rest of the RMB. However, these phenomena may be explained by the low sample size, given that, as shown above, the mobility of this group over the last five years has been very low.

Young people, on the other hand, are the group in which family reasons are most numerous, exceeding 30% in all areas, with the rest of the AMB and the RMB standing out in this regard. They are also the group with the highest level of mobility for work-related reasons, a fact that could be related to the precarious nature and

Figure 43. Distribution of the population by year of arrival at their home and area (2022)



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

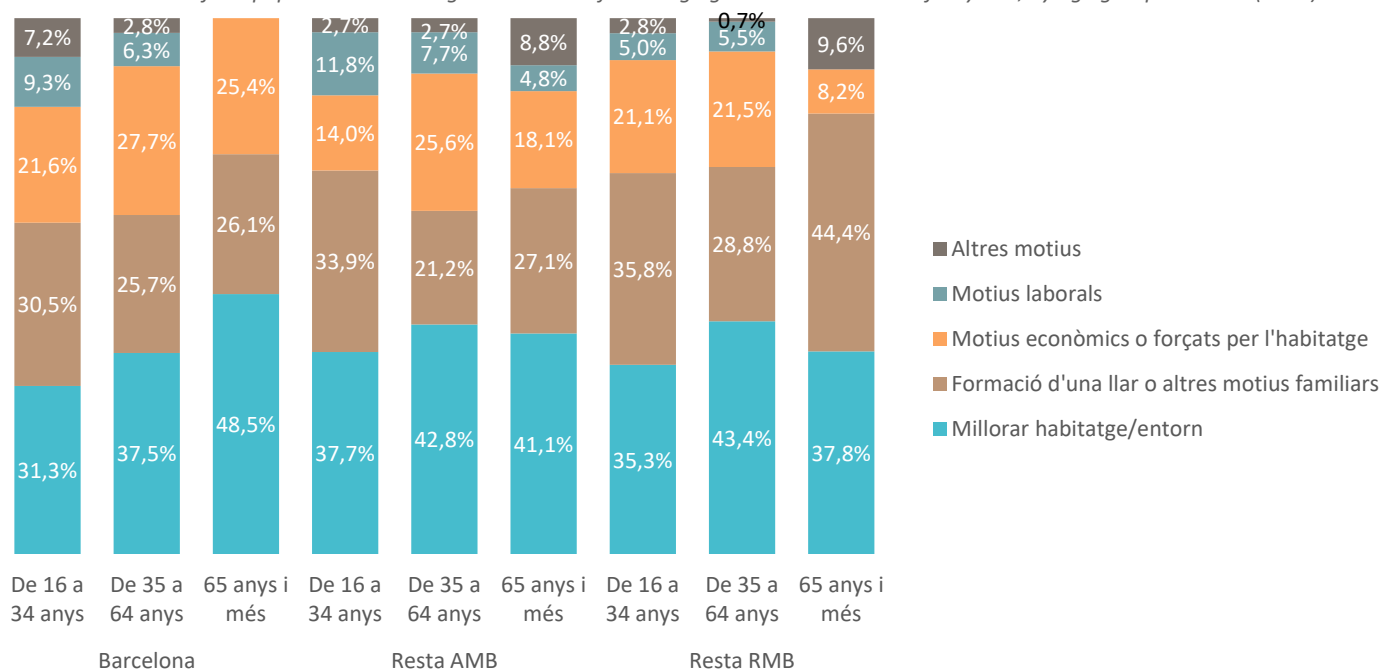
its high residential mobility among young people and middle-aged people, as already pointed out in the previous sections for all age groups. However, the opposite occurs with older people, who change their place of residence less in the Catalan capital compared to other areas. This dual behaviour could have its origins in the growing difficulty in accessing housing, which is pushing young and middle-aged people to move house more frequently, while discouraging older people from changing residence.

With regard to the reasons for changing residence (Figure 44), there are many similarities between the age

shorter duration of contracts in the younger age segments (see Department of Social Rights, 2021). Moreover, compared to the middle-aged group, young people are less likely to be displaced due to economic reasons or forced to move due in the three areas.

It is middle-aged people who are most often forced to move for economic reasons, followed by older people in two of the three areas.

Figure 45. Distribution of the population according to the reason for changing residence in the last five years, by age group and area (2022)



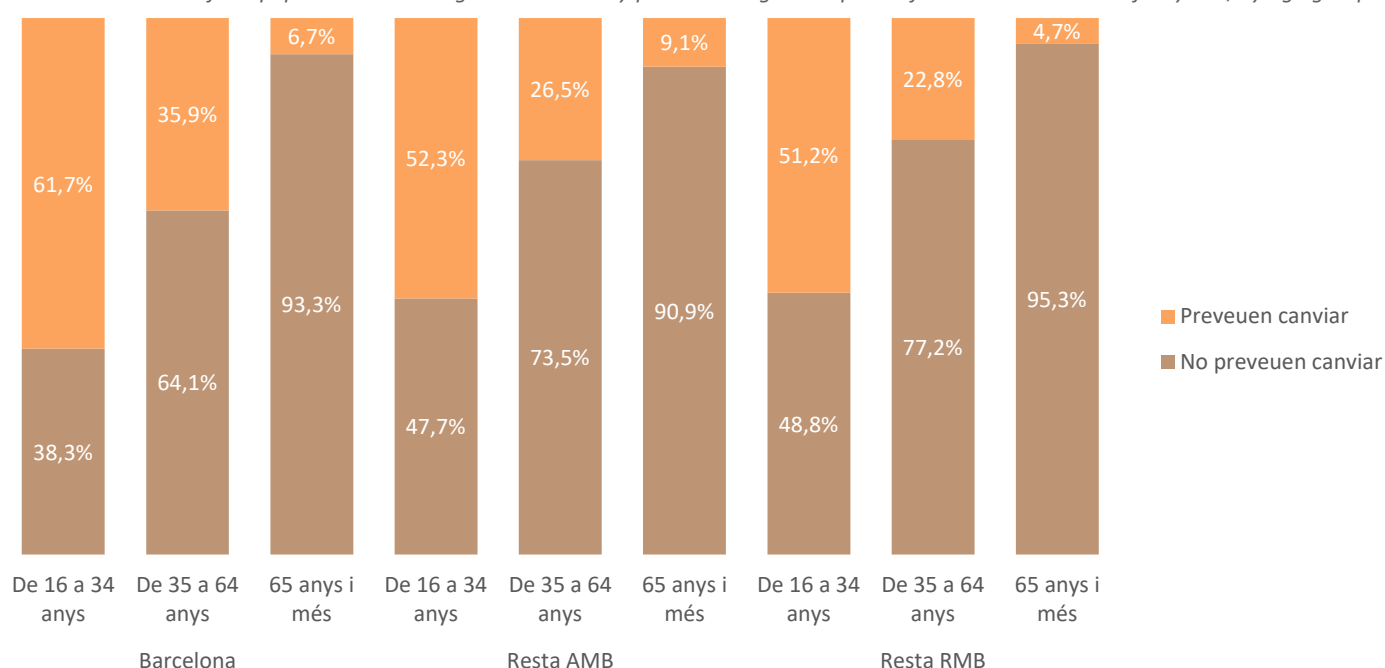
Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

Improving the housing situation or the surroundings is also more important for the middle-aged group, except in the city of Barcelona, where this is surpassed by the elderly age group. This could be attributed to the high purchasing power needed to improve the surroundings in the city of Barcelona compared to the rest of the Metropolitan Area and Region.

The significant similarities, combined with the low sample size in some categories, make it difficult to draw conclusions about how representative these figures are.

However, it seems that the main difference between age groups lies in mobility itself and not so much in its causal factors.

Figure 44. Distribution of the population according to whether they plan to change their place of residence in the next five years, by age group and area



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

When focusing on those individuals who plan to change their place of residence in the next five years (Figure 45), age once again emerges as an extremely relevant variable. Young people are the group in which those planning to change their place of residence are most prominent, but this group becomes less important as age increases. The reluctance of older age groups to change their place of residence is not surprising and is in line with what has been observed in the literature (Ossokina and Arentze, 2022), as well as **the classic idea of residential mobility caused by the family life cycle, according to which people change residence to adjust to the needs and preferences of each stage of life** (Rossi, 1955).

Barcelona once again stands out as the area with the highest mobility among young people and middle-aged people, exceeding the rest of the country by around 10 percentage points in both cases.

As for the reasons for changing residence (Figure 46), the majority of young people have plans to start a family or have other family-related reasons. This group is particularly relevant outside Barcelona, whereas in the Catalan capital it shares the spotlight with young people who want to improve their housing.

In the middle-aged group, the possibility of improving the housing situation or the surrounding area is important, standing at over 60% in all areas, while economic reasons hover around 15%, depending on the area.

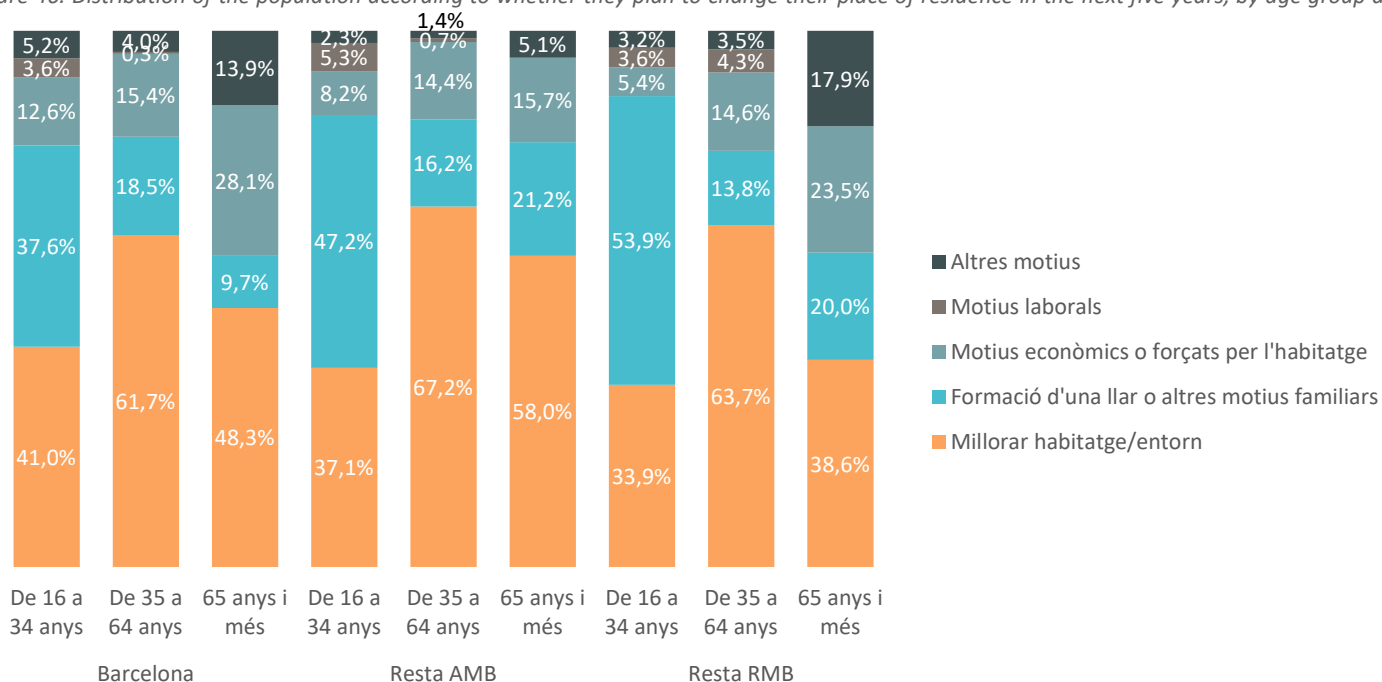
It can therefore be concluded that age has a very strong influence on the decision to move. As people get older, they tend to move home less often, with young people **being the group that has changed residence most in the last five years and have plans to do so again in the next five**, regardless of the geographical area.

Age also has an influence on the reasons for changing residence. While family reasons are important among young people, improving the housing situation or surrounding area is more important among other age groups.

Barcelona is once again emerging as its own microcosm, with greater mobility than other areas, as observed in previous sections, but also with different reasons than other areas. **Residents in Barcelona**, regardless of their age group, **seek to improve their housing situation more than their counterparts in other areas**, with family reasons coming second in comparison. Furthermore, economic reasons are also important in Barcelona.

The causes can be found in the high cost of living in the city, which forces some residents to abandon their homes because they cannot afford to pay the asking price. Furthermore, it seems that **Barcelona residents are less concerned about starting a family and give greater priority to improving their living conditions**, a fact that could be related to the type of families seen in previous sections, where Barcelona stood out for its high

Figure 46. Distribution of the population according to whether they plan to change their place of residence in the next five years, by age group and



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

percentage of single people or couples.

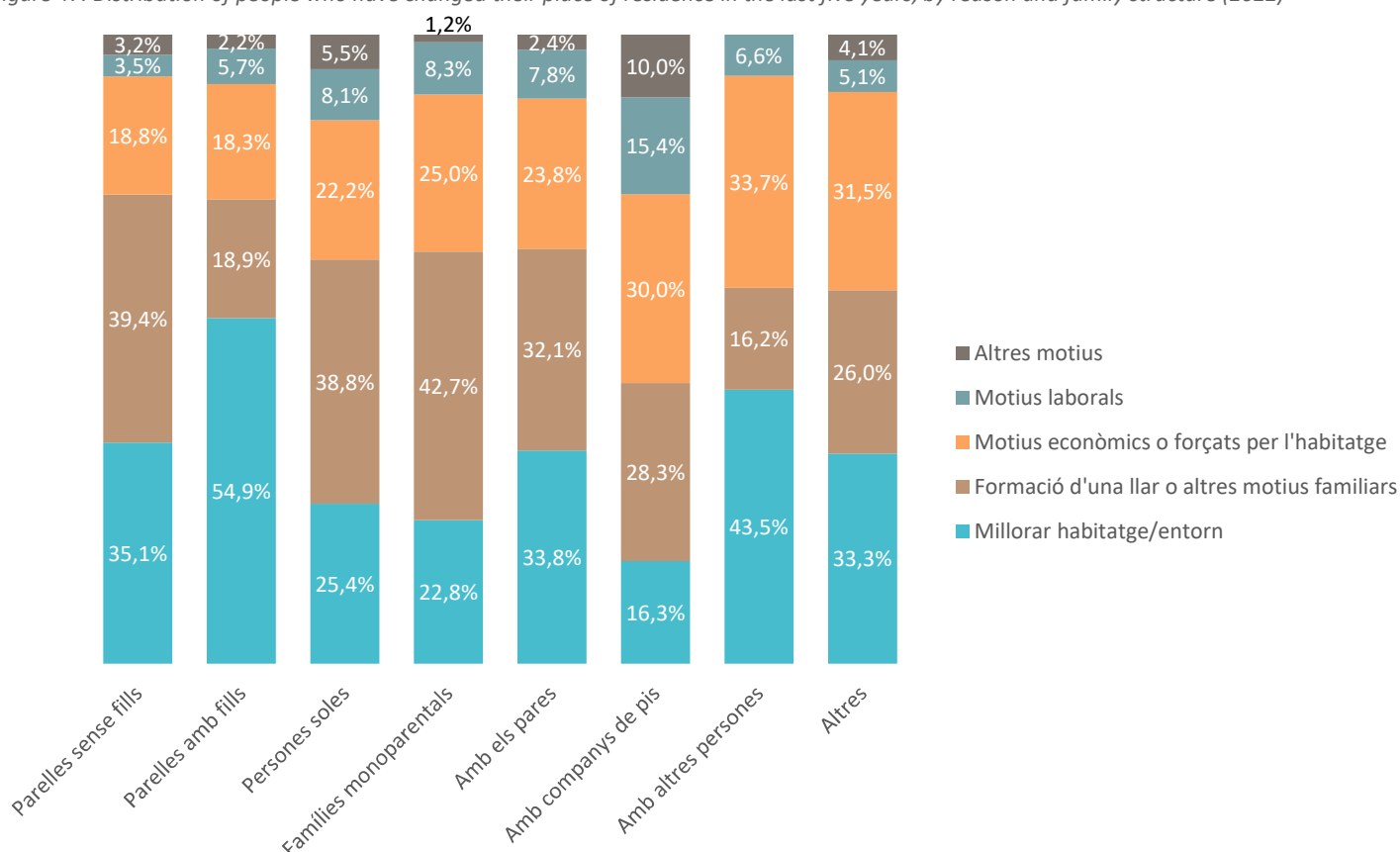
The family structure also affects the reasons for moving (Figure 47). **Childless couples are mainly distributed between those who have formed a home** (meaning they have started living together as a couple) and those who are improving their housing situation in the case of couples who have been living together for a longer period of time. Even though economic reasons are not that important compared to other groups, they still account for about 20%.

Most people who live within a conjugal structure (regardless of the number of children) have relocated improve their housing situation, whereas very few have

distributed among the three main categories, whereas people living with partners stand out for a high percentage of reasons beyond their control, with 30% of people forced to do so for economic reasons and more than 15% for work-related reasons, which is almost double the figure for other family types. People who live with other people (i.e., any family structure that includes people beyond the first degree of consanguinity, usually with children and parents at the same time) have the highest percentage of economic reasons, although improving housing also remains an important factor.

The outlook for the next five years is completely different (Figure 48). Couples, whether they have

Figure 47. Distribution of people who have changed their place of residence in the last five years, by reason and family structure (2022)



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

done so to start a family or for economic reasons.

The opposite is true for **single people**, a group for whom starting a family is the main reason, followed by economic reasons, with improving their housing situation not being so important. In the same vein, **single-parent families** are also affected, with an even higher percentage for these two categories.

People who live with their parents are fairly evenly

children or not, show very similar distributions, unlike that observed previously. **The vast majority of people living as a couple plan to improve their housing situation or surroundings**, which makes sense, given that new couples formed in the last five years conditioned the previous results.

Improving housing accounts for a smaller percentage among **single people**, although it still amounts to almost 50%. Economic reasons are significant, accounting for

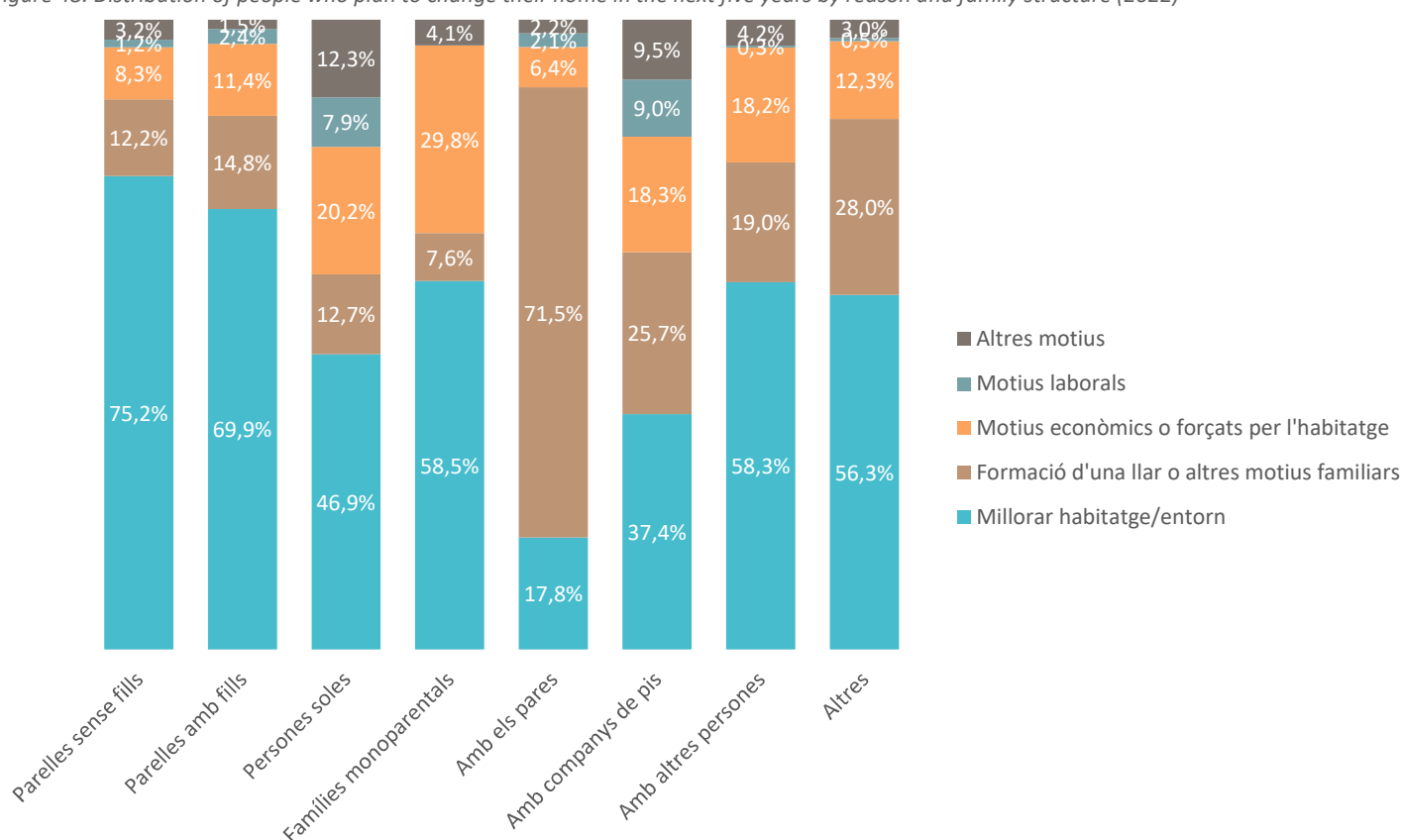
over 20%, as are employment reasons, which account for almost 8%. **Single-parent households** have a similar distribution, **with a higher proportion for the group that plans to improve their housing** and for those who plan to move for economic reasons, which is just under 30%. In contrast, work-related reasons are not relevant for this group.

People who live with their parents are possibly the most unique group, with **more than 70% planning to form a home**, whereas the other categories are fairly insignificant.

more vulnerable, specifically single-parent families, people living alone, those who share flats and those who live with other people. These types are characterised by a high percentage of people who move house for economic or work-related reasons, as well as a low percentage of people who do so with the aim of improving their housing situation.

Couples, regardless of whether they have children or not, **change their place of residence to improve their living conditions or for family reasons**, which could be called **categories of choice**, as opposed to economic or work-related reasons, which could be called **categories of**

Figure 48. Distribution of people who plan to change their home in the next five years by reason and family structure (2022)



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

Those who live with flatmates have the most equitable distribution of all cohabitation types, with a high percentage of people who plan to form a household (25.7%) compared to other structures, while the majority of those who live with other people plan to improve their housing situation, although forming a household or economic reasons are also relevant.

In conclusion, the family structure is another relevant variable in determining the reasons for a change of residence. **Certain types of people are identified as**

force majeure.

In general, **the trends are very similar to previous studies in the United Kingdom, where a difference was also observed between people living alone and couples**, with the former changing their place of residence more frequently for work reasons and to form an independent

home. Couples, on the other hand, mention a home more often (Coulter and Scott, 2014).

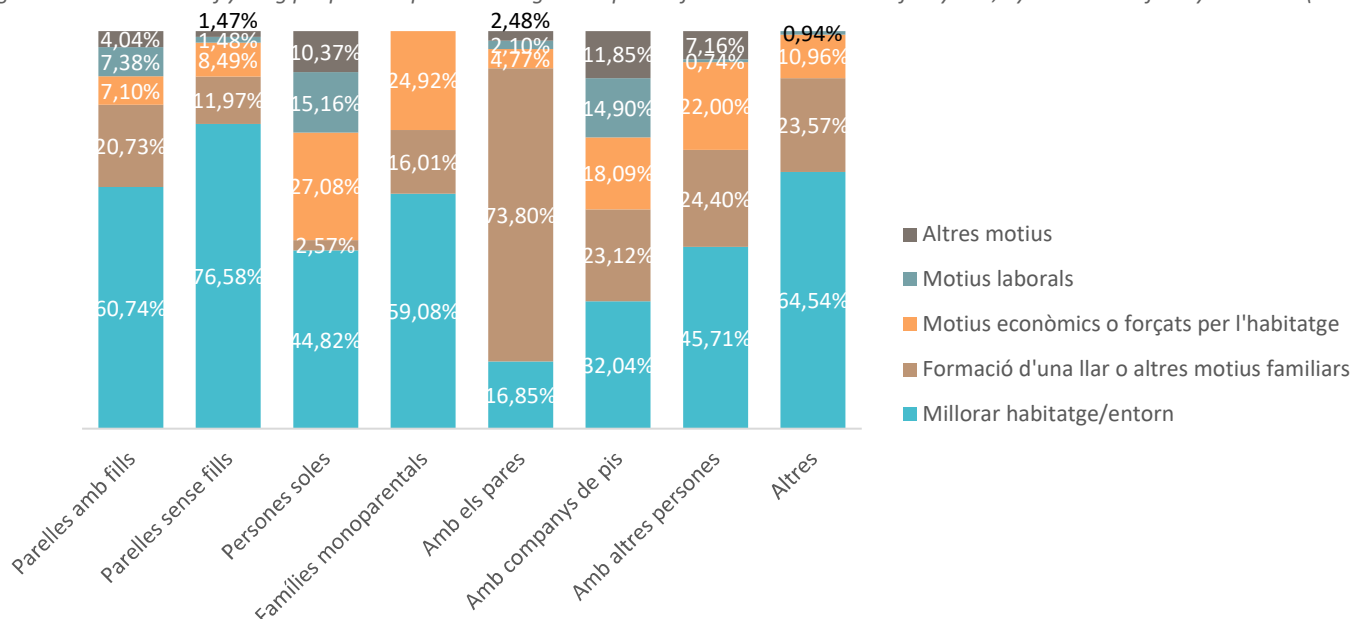
these effects.

6.4. Satisfaction with one's home

Figure 49. Distribution of young people who have changed their place of residence in the last five years, by reason and family structure (2022)



Figure 50. Distribution of young people who plan to change their place of residence in the next five years, by reason and family structure (2022)

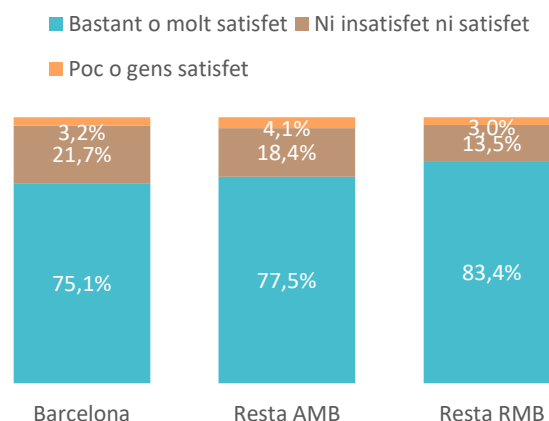


Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

Focusing solely on young people (under 35), the results are very similar to those for the general population (Figure 49). Age, therefore, does not seem to have a significant effect. The higher percentage of childless couples and single people forming households stands out, as might be expected in this age group. Furthermore, as previously noted, economic reasons carry

In an ideal situation, one of the main objectives, if not the main one, when relocating should be to increase the level of satisfaction with one's home. Therefore, a higher level of satisfaction should be observed among those who have changed their home in the last five years compared to those who plan to do so in the next five years.

Figure 51. Distribution of the population according to their degree of satisfaction with their home, by area



Source: Original using microdata from the Urban Cohesion Survey

less weight than in other age groups.

A similar trend can be observed in the projections (Figure 50), with results practically identical to those for the population as a whole. In general, it seems that young people do not have any specific characteristics in terms of the relationship between their reasons for changing residence and the family structure.

Although the results have not been broken down by area due to the small sample size in some categories, no major differences between areas were observed, with the family structure being the variable that actually causes

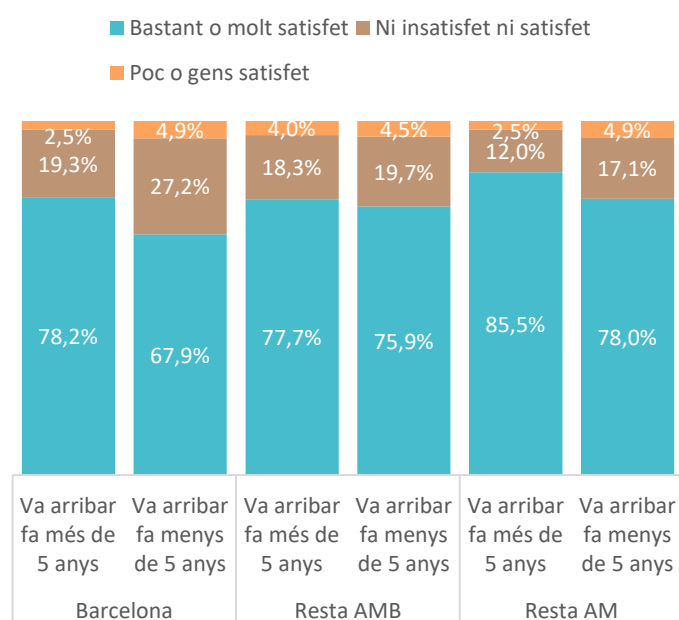
conducted by the Metropolis Institute (2022).

In general, **the satisfaction of the population of the metropolitan region with their homes is very positive** (Figure 51). In all areas, more than three quarters of the population say they are quite or very satisfied with their housing, with the rest of the RMB standing out at 83.5%. Those who are **somewhat or very dissatisfied remain below 5% in all areas**.

looking to improve their housing situation obtained results similar to those of the general population in all areas. Surprisingly, outside Barcelona, work-related reasons also rank closely. Furthermore, the formation of a home and family-related reasons yield slightly better results than economic reasons, although both categories are well below the levels for the population as a whole.

Forming a household or other family-related reasons also obtained more negative results than the total for

Figure 52. Distribution of the population according to their degree of satisfaction with their home, and year of arrival at their home.

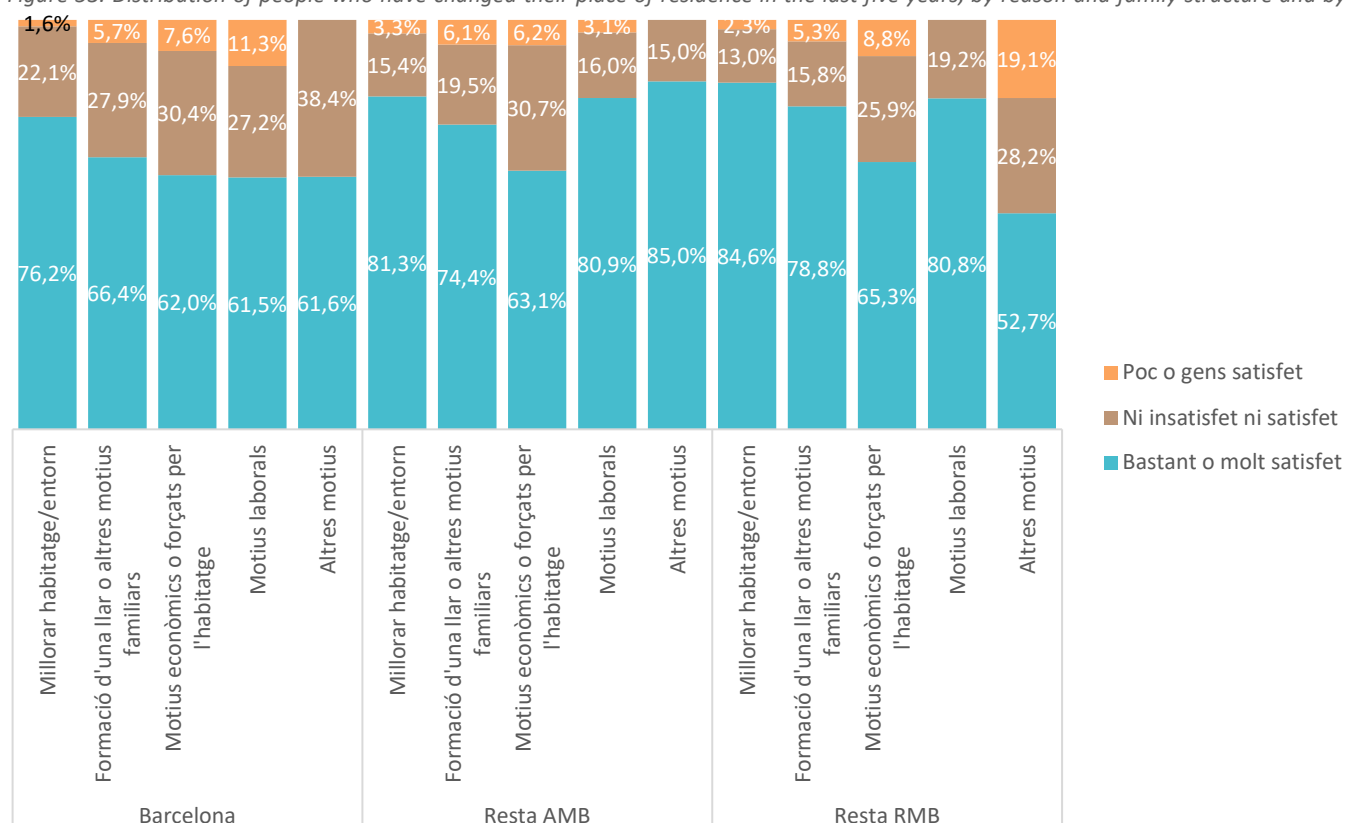


Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

When comparing people who have changed their home in the last five years with those who have not (Figure 52), the first group displays a lower level of dissatisfaction. The main differences are found in Barcelona city and the rest of the Metropolitan Region, while in the rest of the AMB the results are fairly similar.

Among the different reasons for changing their place of residence (Figure 53), people who did so to improve their own housing situation or their surroundings have higher levels of satisfaction than those who did so for economic or work-related reasons, a pattern that is repeated in all three areas. When comparing the satisfaction levels of people who have not recently changed their place of residence, it can be seen that only those who were

Figure 53. Distribution of people who have changed their place of residence in the last five years, by reason and family structure and by area



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

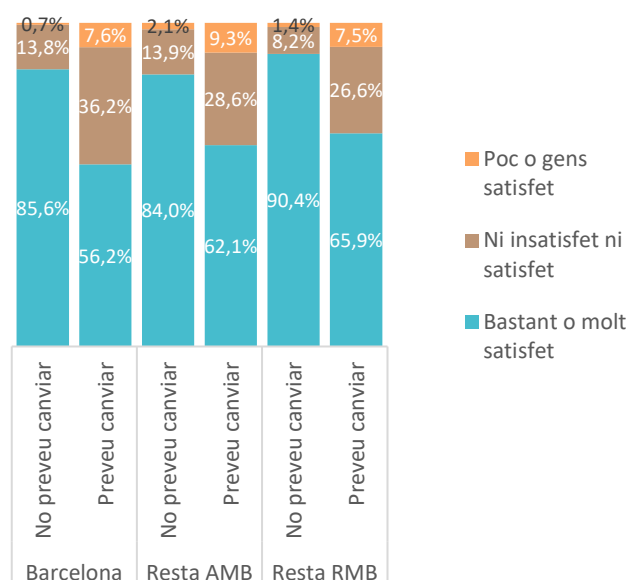
Barcelona, around 10 percentage points less. The only category is that of having improved their housing situation or surroundings, which obtained figures similar to those for the population as a whole.

The results are slightly more positive in the rest of the Metropolitan Area, following the trend already observed across the population as a whole. The differences with Barcelona are that starting a family is not that far removed from the general population and that people who change homes for work-related reasons are in the majority, with over 80% of people quite or very satisfied.

As for the rest of the RMB, the results are similar to those of the other two areas. The desire to improve one's housing situation has a positive effect, exceeding the results for the general population, while the rest are lower. Economic reasons are once again the last category, well below the total population (not including other reasons, which have a low number of responses).

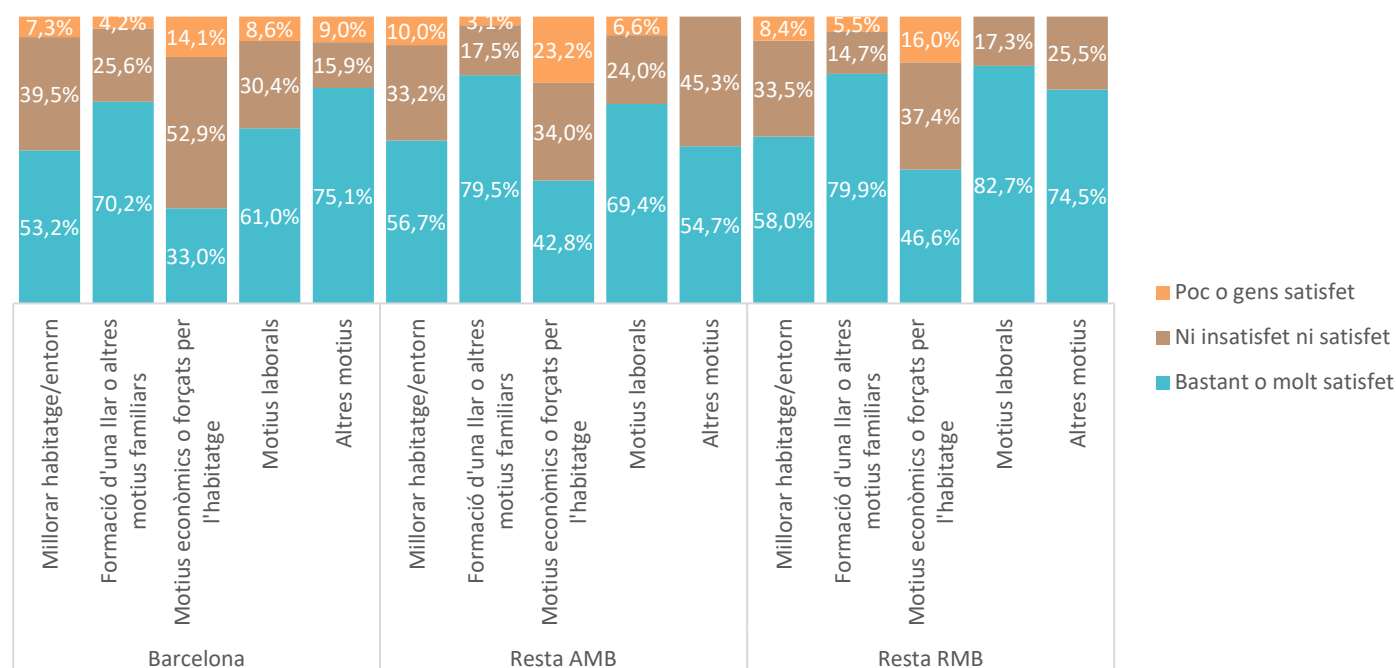
The results are even more extreme when the focus is placed on future expectations (Figure 54). People who do not plan to move home enjoy a much higher level of satisfaction than the rest, between 20 and 30 percentage points higher, depending on the area.

Figure 54. Distribution of the population according to their degree of satisfaction with their housing unit and whether they plan to move home



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

Figure 55. Distribution of the population planning to move home in the next five years, according to degree of satisfaction and area (2022)



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

The differences are particularly striking in Barcelona, where only 56.2% of people who plan to move house say they are quite or very satisfied with their current home, almost 30% more than the population that does not plan to move.

On the whole, the figures are as expected and confirm the initial hypothesis. People who plan to move house do so, in part, because they are dissatisfied with their current situation.

Focusing now on the reasons for planning to move home (Figure 55), it can be observed that, in Barcelona, people who want to improve their housing situation or surroundings have a mediocre opinion of their current housing, while those who expect to be forced to leave their homes do not rate them either positively or negatively. The categories with the most positive results are starting a family or family-related reasons and work-related reasons, both of which account for more than half of the total number of people who plan to move home.

Similar results were observed in the rest of the AMB, with improving the housing situation and economic reasons being the most negative categories and starting a family and work-related reasons being the most positive. In most categories, however, the percentage of people who are fairly or very satisfied is about 10 percentage points

higher than in Barcelona city.

The same trend is seen in the rest of the RMB, with even more positive assessments than in the Metropolitan Area.

This section looks at how happy people are with their housing, to compare it with those who have moved or are looking for work. The initial hypothesis was that people planning to move home would have a lower level of satisfaction than the general population, whereas those who had recently moved would have a higher level of satisfaction, given the short period of time that had elapsed since the decision to move to the new home.

This hypothesis has only been partially confirmed, because even though people who plan to move house are less satisfied than the general population, those who have recently moved are also less satisfied.

This level of satisfaction is tempered by the reason why they had to relocate. Those reasons that can be classified as comfort (improving housing and forming a home) obtain relatively positive results, ranking close to the overall satisfaction levels. Those who change homes to improve their living conditions are just above this, and those who do so to start a family are just below. Economic reasons, however, obtain much more negative results than the general population, whereas work-

related reasons obtain negative results in Barcelona but maintain the trend of the overall population outside the city.

These reasons also have an effect on people who are planning to relocate. In this case, it is the formation of a home that is most positively valued in terms of current housing. It could therefore be understood that these people are changing their place of residence out of sheer necessity. This is also true of those who anticipate moving for economic reasons, though under a higher level of coercion, and conversely, they rate their current housing very negatively.

There is a tendency to value new homes less highly among people who have had incentives (work-related or family reasons) to move, which seems to indicate that these people sacrifice satisfaction with their housing in order to gain quality of life in other aspects, such as proximity to work, the possibility of starting to live as a couple or having more space for their children.

Looking at the different areas in particular, the city of Barcelona scores lower than the rest of the areas. The Catalan capital therefore offers other attractions beyond housing that draw people to the city. Within these elements, we expect to find a wider range of job opportunities (often better paid), an immense cultural offering, and access to services that are not available in all municipalities in other areas.

In this regard, mobility in the Barcelona Metropolitan Region is characterised by dissatisfaction with housing. Both those who have moved and those who plan to move are less satisfied with their housing than those who remain in the same home. Housing stability therefore appears to be a determining factor in the degree of satisfaction with one's home. This could be related to the fact that people who relocate tend to have access to poorer quality housing (whether in terms of location, size or other factors) than those who already have stable housing.

As a final reflection on this section, satisfaction with one's home seems to improve only when the home itself or its surroundings improve, which in the vast majority of cases entails an increase in purchasing power, especially at a time of rising prices (as will be seen in Section 5). Satisfaction with housing therefore seems to be yet another reflection of the economic status of the population.

6.5. Mobility flows

One of the main elements for understanding residential mobility is to analyse the flows to find out where people who change their place of residence are moving to.

Looking at the movements over the last five years (Figure 56), most movements took place within the same area, with a large proportion of these being intra-municipal (particularly significant in Barcelona, which forms its own area). In all territorial areas, between 70% and 80% of residential moves are within the same area.

The differences between the two areas start to become apparent in the remaining percentage. In Barcelona, **around 10% of people who have arrived in the last five years come from outside the RMB, and another 10% come from municipalities within the rest of the AMB. Only a small percentage (3.7%) comes from other municipalities in the RMB.**

The rest of the Metropolitan Area, however, accounts for around 20% of movements originating in Barcelona, while, in comparison with Barcelona, those coming from outside the RMB (7%) are losing weight and those from the rest of the RMB remain stable.

In the rest of the Metropolitan Region, a considerable percentage of the population comes from municipalities within the AMB (11.9%), while those coming from the Catalan capital are fewer when compared to the AMB (6.5%). Very few people from outside the RMB are involved, just 6%.

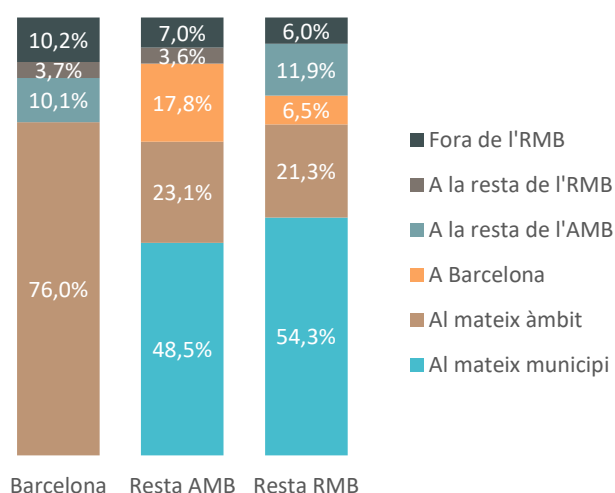
These figures show that the population of the RMB does not undergo major geographical changes when relocating but rather chooses to remain close to where it lives. The differences between the areas can also be explained by their proximity: the AMB includes people who come from Barcelona, while the RMB does the same with the AMB.

One of the problems that can be identified with this graph is the difficulty of moving to Barcelona, not only to the city itself, but also from a geographical perspective. **Very few people from other areas of the Metropolitan Region move to Barcelona, with outsiders** (both from other parts of Catalonia and from other regions of Spain and abroad) **accounting for most of the external flows to the city.** People coming from other areas of the RMB account for less than 15% of changes of residence, while in the other two areas, mobility from Barcelona and the

rest of the area is close to or even exceeds 20%.

Barcelona seems to be losing population, especially to other municipalities in the AMB, which makes sense given the importance of proximity in these figures. As for the RMB, long-time Barcelona residents do not carry as much weight, with those from the rest of the AMB prevailing in this case.

Figure 56. Distribution of the population that has changed residence in the last five years, by location of the former municipality

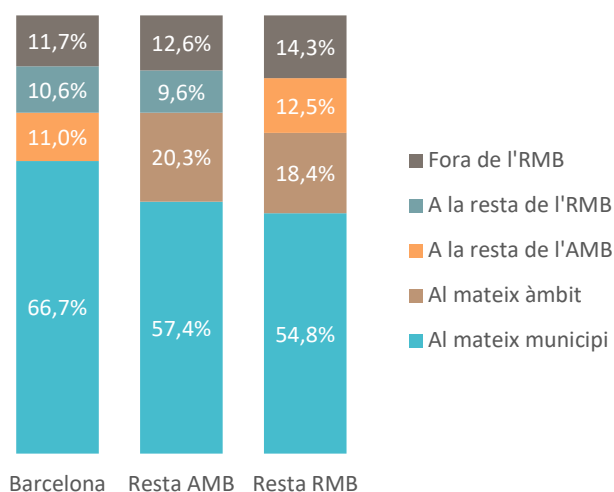


Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

Looking at the movements expected over the next five years (Figure 57), we see figures very similar to those of the last five years. The vast majority of the population plans to remain in the same area, specifically in the same municipality. Unfortunately, the microdata do not contain a specific category for people wanting to move to Barcelona, so observations cannot be made in this regard. The remaining elements, however, once again highlight the preference for proximity when changing residence.

Figure 57. Distribution of the population that plans to change residence in the next five years, by municipality where they plan to

move

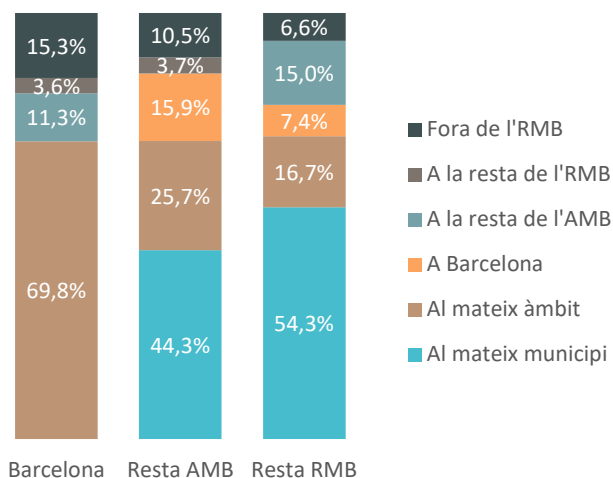


Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

On the whole, **the tendency towards proximity shows that people in the RMB prefer to stay close to where they live, especially within their own municipality, but if they have to leave, they prefer to stay nearby.** However, this could also be explained by the socio-economic similarities within municipalities and areas, given that someone who can barely afford to live on the outskirts of Barcelona is unlikely to move to the capital. Furthermore, family and social ties can reinforce this preference for proximity.

The results are very similar when focusing on the young population (aged 16 to 34) (Figure 58). Contrary to what one might expect, the proportion of young people from outside Barcelona is higher than in the general population, mainly due to an increase in the number of people coming from outside the RMB. The results in the other two areas are practically identical.

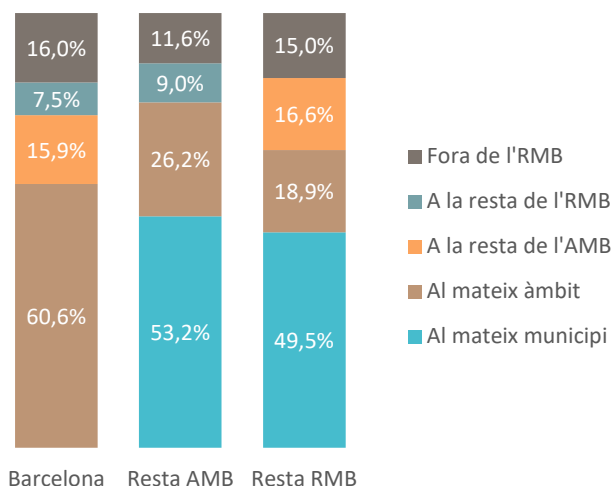
Figure 58. Distribution of young people who have changed their place of residence in the last five years, by location of the former municipality



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

As regards the expected changes (Figure 59), the results are also practically identical. Young people who expect to stay in Barcelona represent a similar percentage to that of the population as a whole, with the most significant differences being observed among young people in the Rest of the AMB who want to stay in the same municipality, with a lower percentage in comparison, and among the population outside Barcelona who want to leave the RMB, which is also lower in the case of young people. In any event, the results are so similar that we cannot say with any certainty that a relationship exists.

Figure 59. Distribution of the population that plans to change residence in the next five years, by municipality where they plan to move



Source: Original using microdata from the Urban Cohesion Survey conducted by the Metropolis Institute (2022).

Residential mobility is therefore another indicator of people's socio-economic status and, consequently, of the power they have to decide how they want to live and, in this case, where they want to live. As a major city, Barcelona offers advantages that go far beyond housing. Although it is a very important aspect of life, **part of the population is willing to make sacrifices in terms of satisfaction with their housing in order to live in the capital.**

A key question is what happens to those people who are forced to move for economic reasons. **Lower-income families tend to move more frequently** (Schacter, 2004), a phenomenon compounded by **dissatisfaction among people who are forced to move for economic reasons.** In the long term, these families tend to concentrate in areas with fewer advantages (Baker et al., 2016), which means that the desire to improve satisfaction with their housing situation faces obstacles that prevent it from becoming a reality.

Another aspect of relocation is its negative effect on mental health, as shown by several studies (see Choi and Oishi, 2019). Furthermore, not all types of mobility have the same effect. People who are moving towards stability (towards home ownership, for example) show better mental health than those who are in risky situations, such as being unable to meet mortgage payments (Wood et al., 2023).

Key points

Approximately half of the residents of the RMB have changed their place of residence in the last five years or plan to do so in the next five years, a very high percentage, especially in the city of Barcelona.

The reasons for moving are varied, with the most notable being improved housing or surroundings, starting a family, or other family reasons, although more than 20% of the population has been forced to move for economic reasons.

Residents in the RMB change homes less frequently as they get older, though the reasons for this are similar across all age groups. High residential mobility affects young people particularly.

There is no noticeable trend of young people leaving Barcelona in greater numbers than the rest of the population.

A number of family structures have been identified as particularly vulnerable to forced relocation, namely single-parent families, people living alone, those sharing flats and those living with people beyond the first degree of kinship.

People involved in a residential mobility process are less satisfied with their housing than those who have stable housing. This applies both to people who are planning to move and to those who have recently moved.

However, overall satisfaction with housing in the RMB is generally high.

7. Analysis of supply and demand

This section analyses the evolution of supply and demand for housing units in the Barcelona Metropolitan Region and in the districts of the city of Barcelona, with the aim of understanding the dynamics of the property market in recent years. The study is based on a quarterly review of the number of sales and rental contracts signed, as well as the average price associated with each of these markets, since 2019. This analysis aims to identify the main trends, fluctuations and factors that have influenced the performance of the sector, taking into account the possible economic, social and regulatory impacts that have shaped this period.

7.1. Analysis of the supply

7.1.1. Rental market

Based on the data available from Incasòl, the analysis carried out shows (see Figure 60) that the number of rental contracts signed has fallen steadily since the first quarter of 2021, reaching 20,225 contracts signed during the fourth quarter of 2023, 30% less than in the first quarter of 2019 (28,745 contracts).

By area, Figure 61 shows that the territory that has seen the greatest reduction in supply is Barcelona, with a 50.4% reduction in the last five years (8,531 contracts in the fourth quarter of 2023, compared to 12,832 contracts in the first quarter of 2019). In contrast, the area least affected by the overall reduction in the number of rental contracts is Garraf-Penedès (-19.8%), although in this case the number of contracts signed is significantly lower than in Barcelona (1,041 in the fourth quarter of 2023, 1,248 in the first quarter of 2019).

When focusing on the city of Barcelona and its districts (Figure 63), the districts with the highest number of rental contracts signed are Eixample and Sant Martí. The district that has seen the greatest reduction in the number of rental contracts signed during the period analysed is Ciutat Vella, with a reduction of 50% (2019 Q1: 1,175; 2023 Q4: 585), followed by Nou Barris (-38%) and Gràcia or Sants-Montjuïc (-36%). The district that has seen the smallest reduction in the number of rental contracts signed is Sarrià-Sant Gervasi (-25%).

During the months that *Law 11/2020, of 18 September,*

on urgent measures to contain rents in housing rental contracts and the amendment to Law 18/2007, Law 24/2015 and Law 4/2016 were in effect, no significant changes in the rental market were observed, with the number of contracts in the city's districts remaining virtually stable. However, once the period ended, there was a general decline in the number of rental contracts in central districts such as Ciutat Vella and Gràcia, with reductions of between 24% and 34%.

Furthermore, when analysing the evolution of the average price of rental contracts, it can be observed that the trend since the first quarter of 2019 has been towards an increase in the average price. This means that since the first quarter of 2019 until the fourth quarter of 2023, the average rental price has increased by 18%.

Figure 62 shows that this increase has been particularly notable in Barcelona, which recorded a 25% increase in the period analysed, followed by Vallès Oriental (23%) and Vallès Occidental Oest (20%).

The areas with the highest prices are Barcelona (average price of €1,178), Maresme and Baix Llobregat Sud (average price of €945). In contrast, the lowest average prices are found in Vallès Occidental Est (€757) and Garraf-Penedès (€758).

In the city of Barcelona (Figure 64), the districts that have seen the highest increase in average rental prices are Sants-Montjuïc (+29%), Eixample (25%) and Sant Martí, Gràcia, Horta-Guinardó and Les Corts (24%). Whereas the average rental price has increased the least in Nou Barris (+20%) and Ciutat Vella (+20%). The districts with the highest average rent are Sarrià-Sant Gervasi (€1,563/month), Les Corts (€1,376/month) and Eixample (€1,323/month), while the lowest average rent is found in Nou Barris (€832/month), a difference of over €100 compared to Sant Andreu (€958).

Both indicators, number of contracts and average rental price, show a clear imbalance between supply and demand in the rental market. This may be due to several factors: an increase in relative demand, an increase in the conversion of rental properties to other uses (tourism or sales). The effect observed in the rental market is one of polarisation: only tenants with greater economic resources can access available properties, thus increasing the average rental price.

Figure 60: Trend in the number of contracts and average rental price per quarter

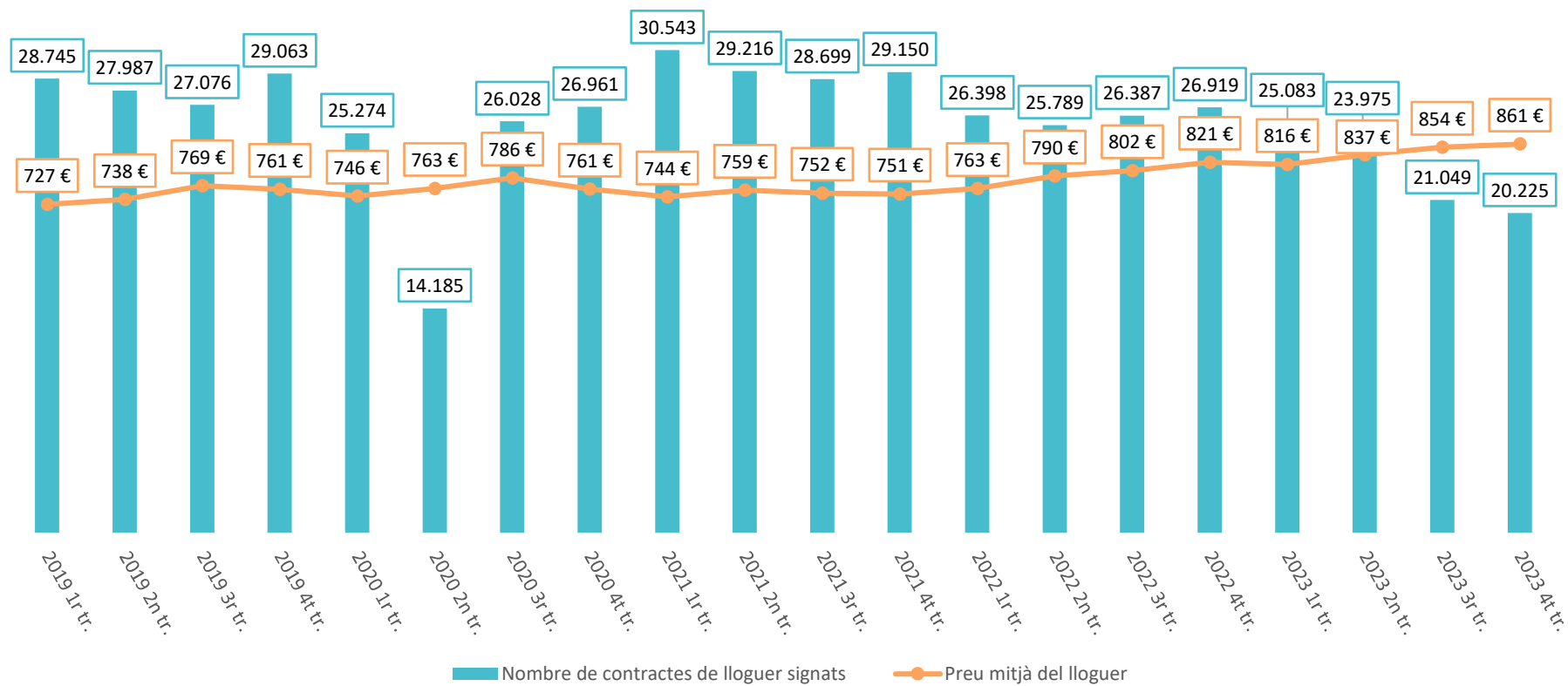


Figure 61: Trend in the number of rental contracts signed by quarter and territorial area

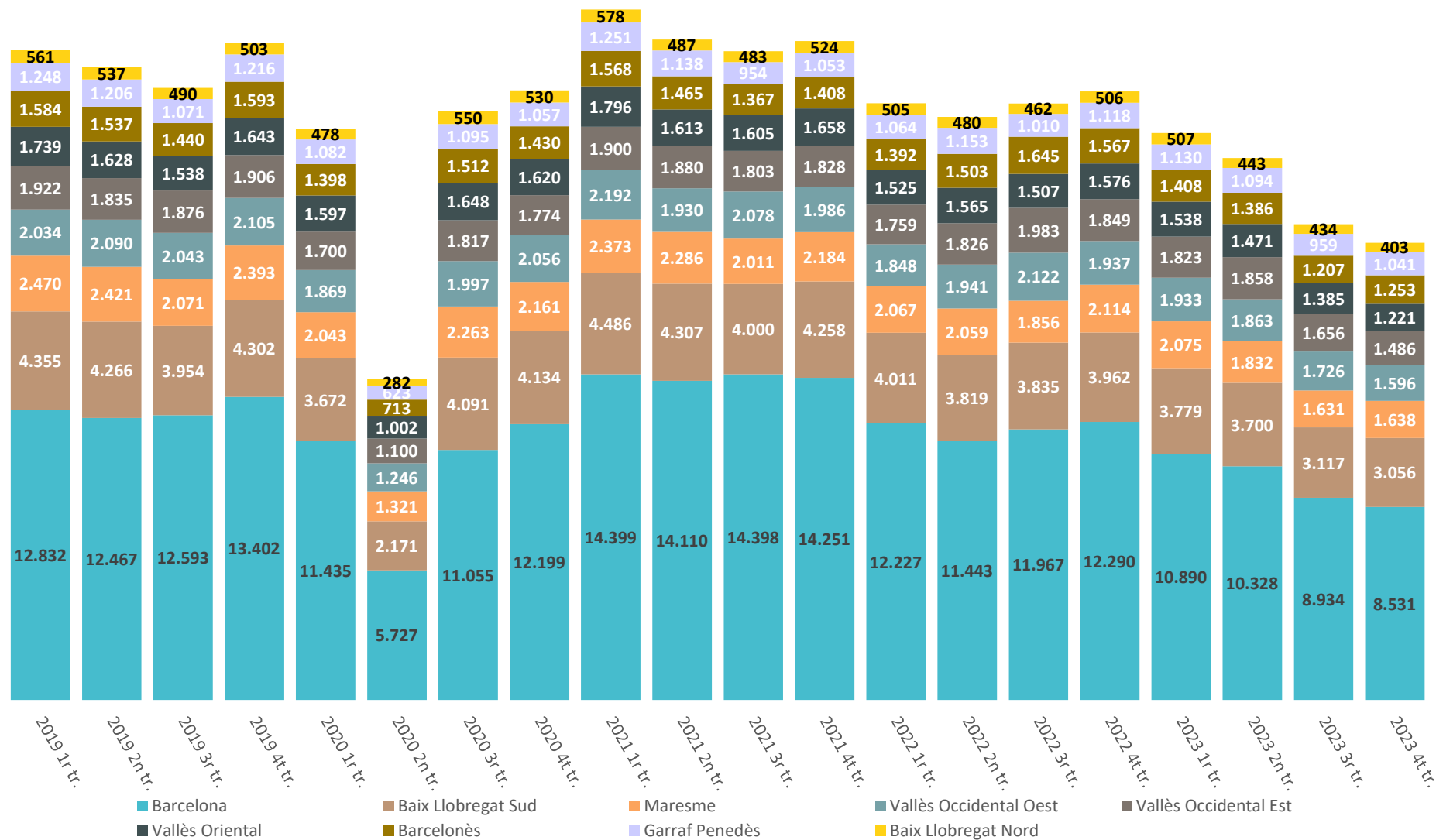
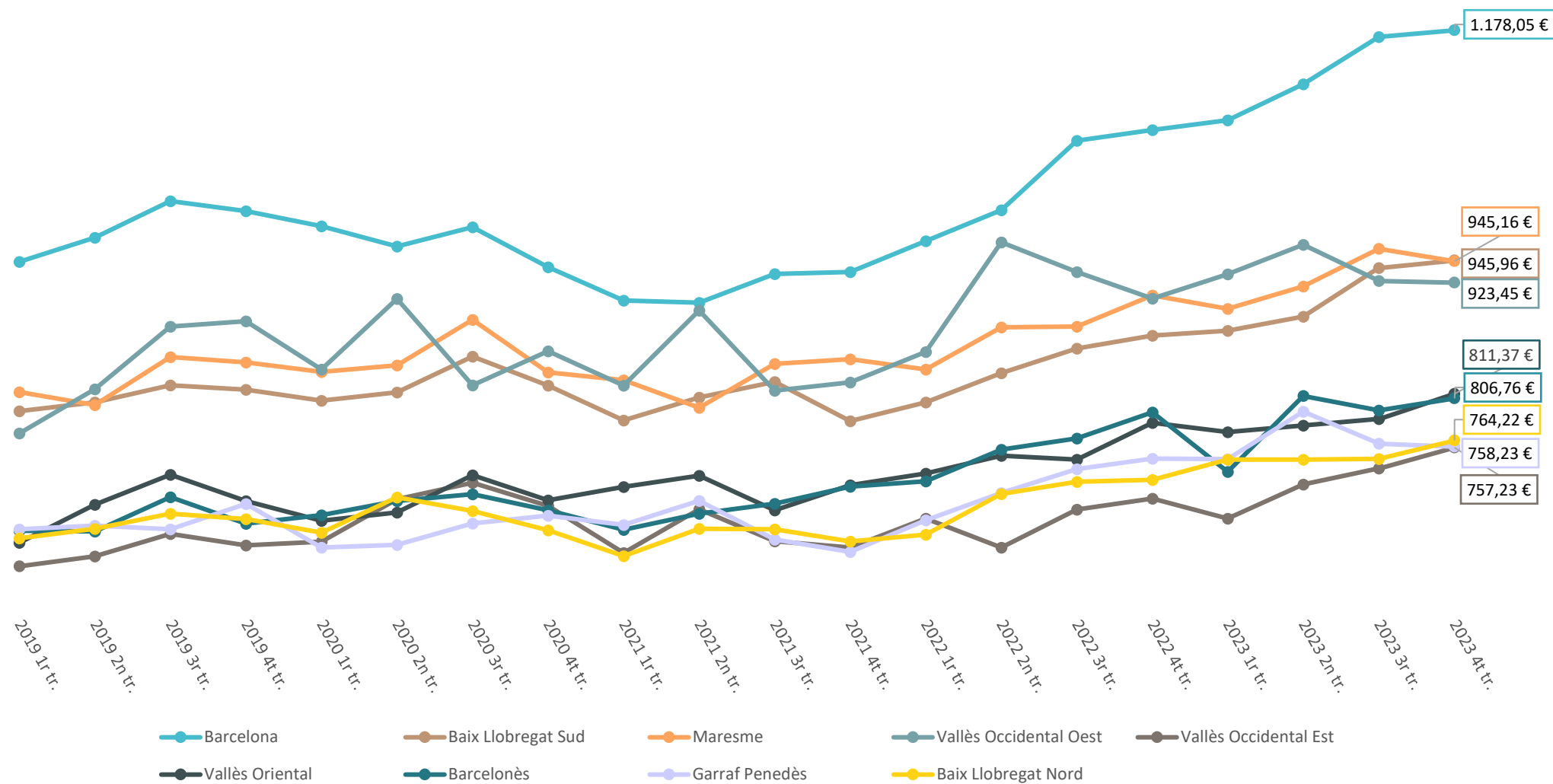


Figure 62: Evolution of the average rental price by quarter and territorial area



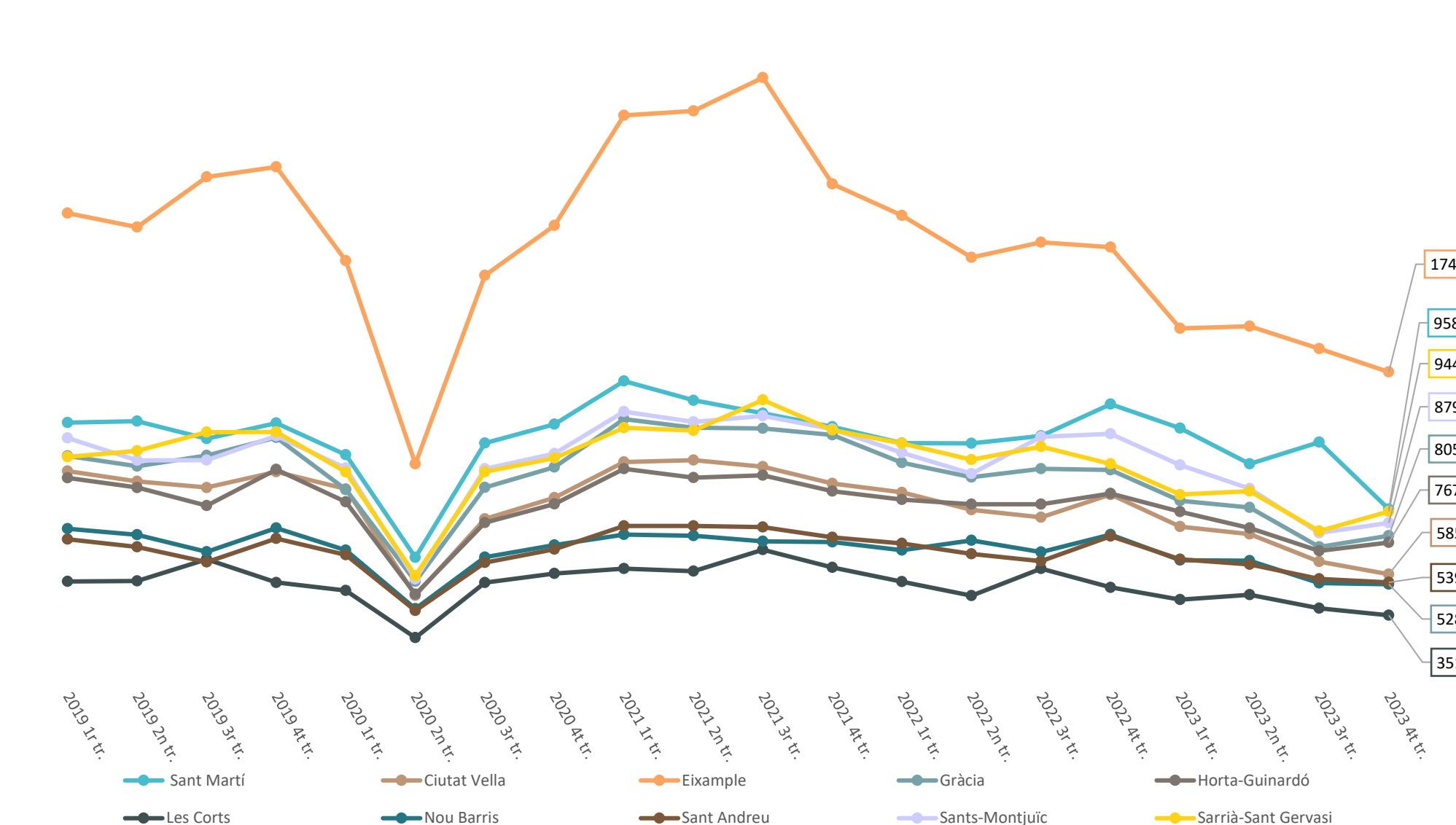
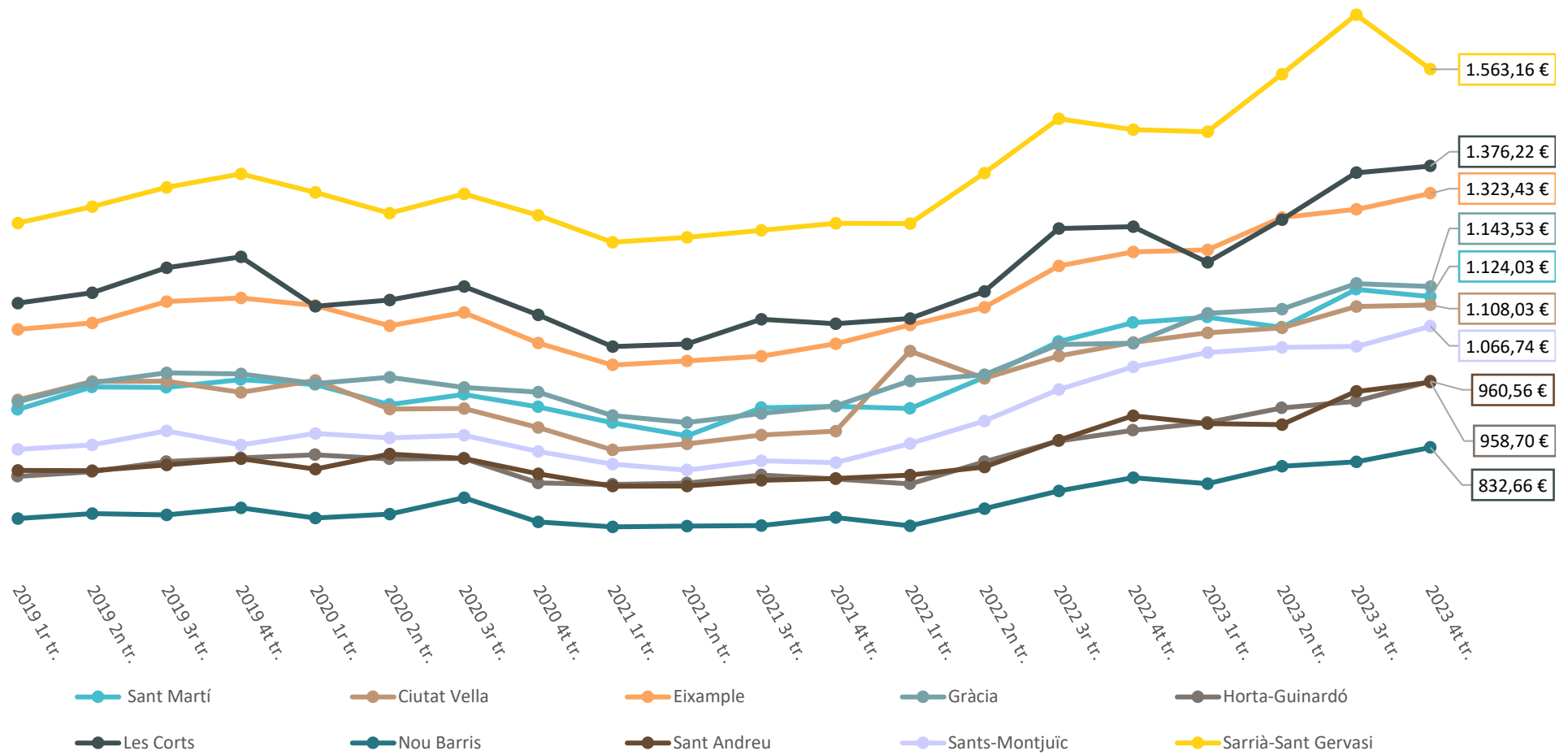


Figure 64: Trend in the average rental price by quarter and district



7.1.2. Housing sales market

The same analysis carried out for the rental market has also been replicated for the housing sales market, using the property market records filed with the Spanish Association of Land, Business and Moveable Property Registrars as the data source.

Firstly, the trend in the number of sales contracts signed during the period analysed was examined (Figure 65). The results show how the COVID-19 pandemic also had a considerable impact on the number of contracts signed during the second (-39%), third (-30%) and fourth (-19%) quarters of 2020 compared to the same quarter of 2019. If we compare these figures with those of the rental market, it appears that the pandemic had a more sustained negative impact on the housing sales market, which required more time to return to normal.

Looking at the trend in the number of contracts by territorial area (Figure 66), in most territorial areas there has been a slight decrease in the number of contracts signed per quarter, especially once the period of application of Law 11/2020 regulating rents in Catalonia ended in April 2023. This is the case in Vallès Occidental Oest (-34%, -20% of which was recorded after the period of application of the Royal Decree – RD) and Maresme (-30%). At the opposite end of the scale is Baix Llobregat Nord, which recorded a 13% increase in the number of sales contracts signed during the period analysed.

The number of signed sales contracts shows a similar trend in the city of Barcelona (Figure 68). Although prior to the entry into force of Law 11/2020 there was relative stability in the number of contracts signed per district, during the second and third quarters of 2020, with the impact of the COVID-19 pandemic, the number of contracts saw a drastic decline. Starting in the third quarter of 2020, a recovery to pre-pandemic levels was observed in most districts, with some cases such as Eixample (+63%), Gràcia (+38%) and Nou Barris (+30%) even exceeding the levels predicted for the year. In this case, although no significant changes were observed with respect to the end of the period of application of Law 11/2020, the total variation during the period analysed in some districts is considerable: Sant Andreu (-35%), Sant Martí (-34%) and Horta-Guinardó (-27%). The only district where the number of home sales has grown significantly is Eixample (+41%).

As for the average purchase price (Figure 67) for the RMB as a whole, before the pandemic (2019 Q1 – 2020 Q1),

the average price stood at around €223,500. Nevertheless, since the second quarter of 2020, the average price has continued to rise, reaching €257,400 in the fourth quarter of 2023, an increase of 15%.

Figure 65: Trend in the number of contracts and average purchase price (in thousands of euros) by quarter

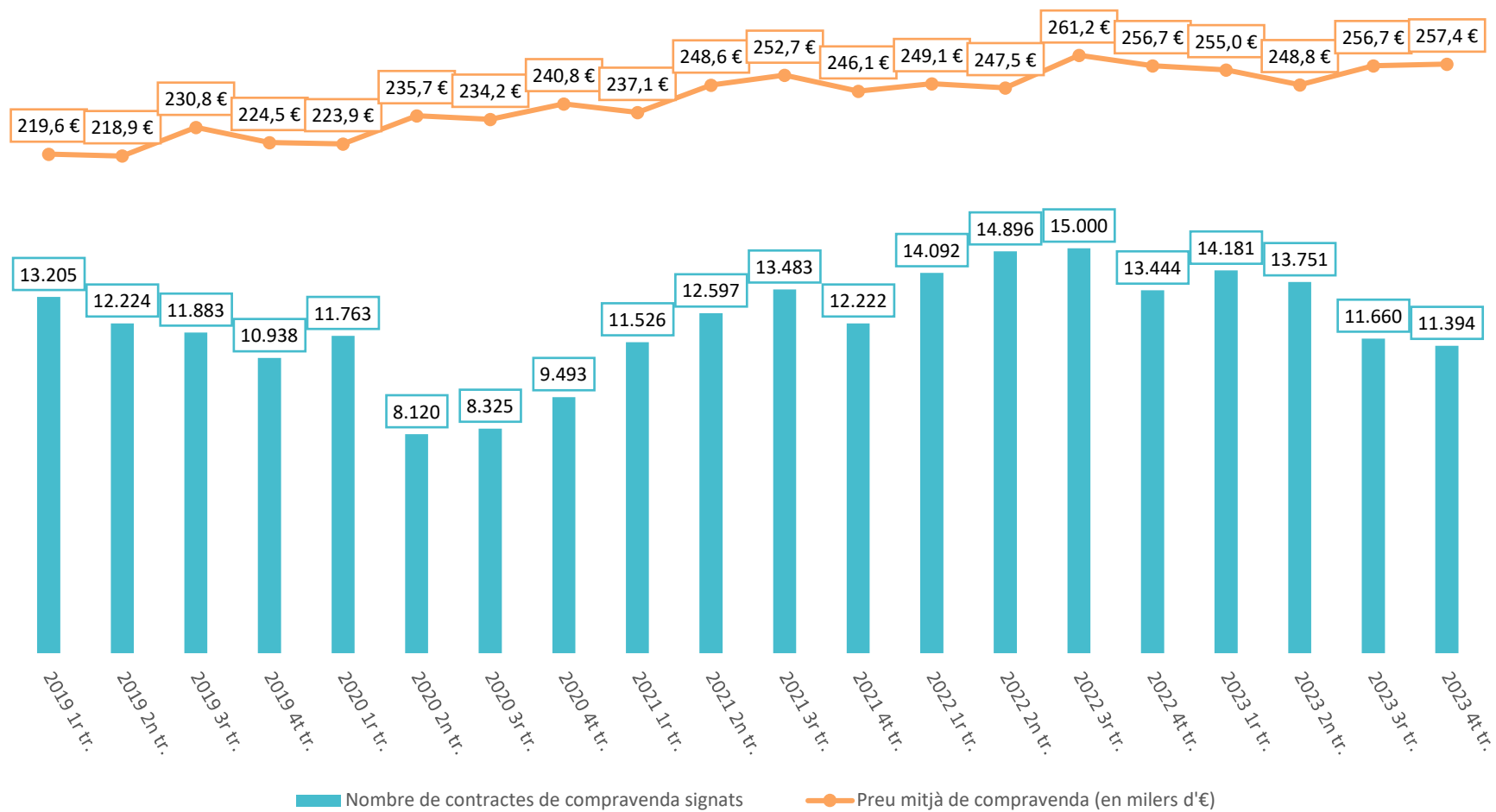


Figure 66: Trend in the number of sales contracts signed by quarter and territorial area

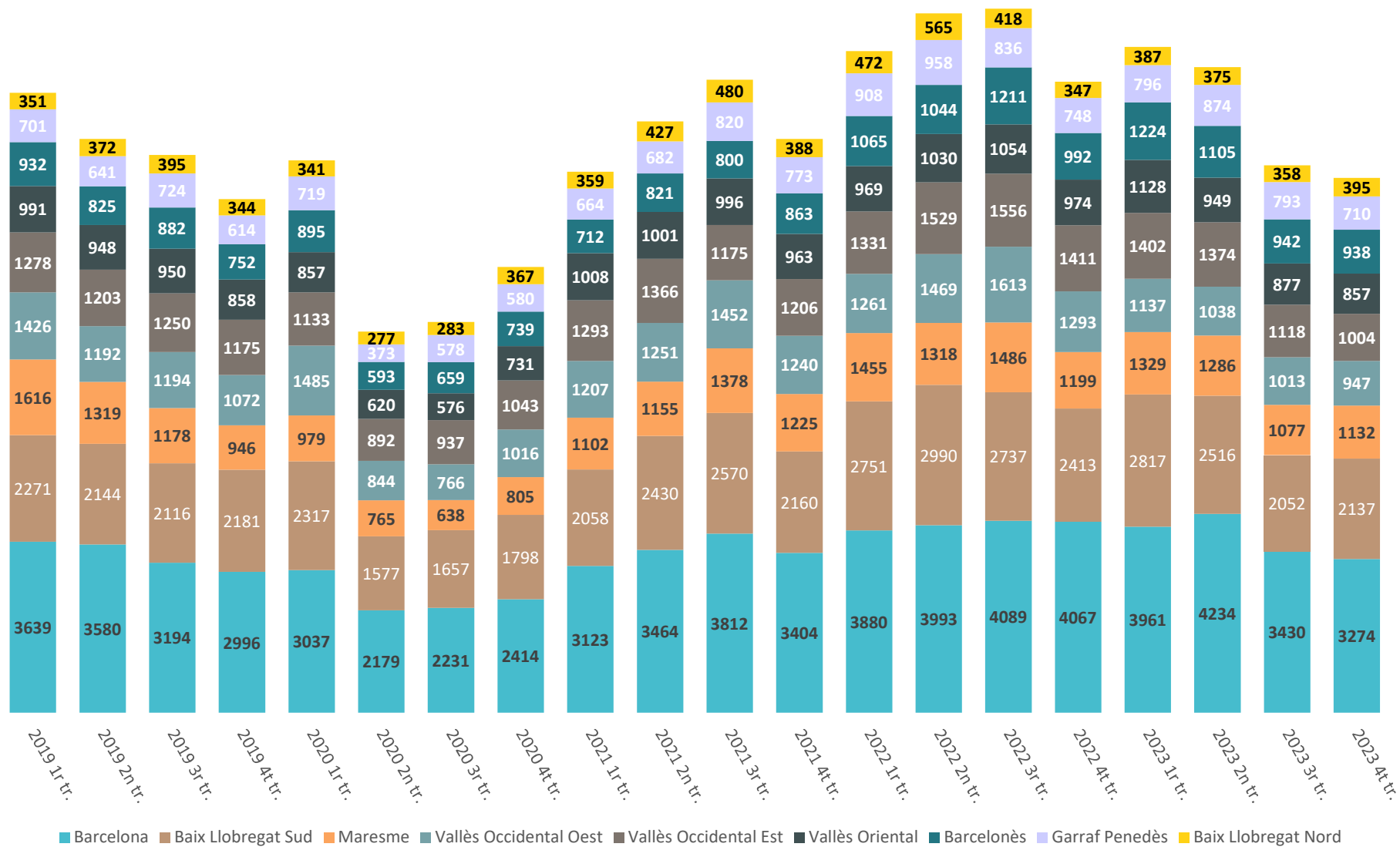
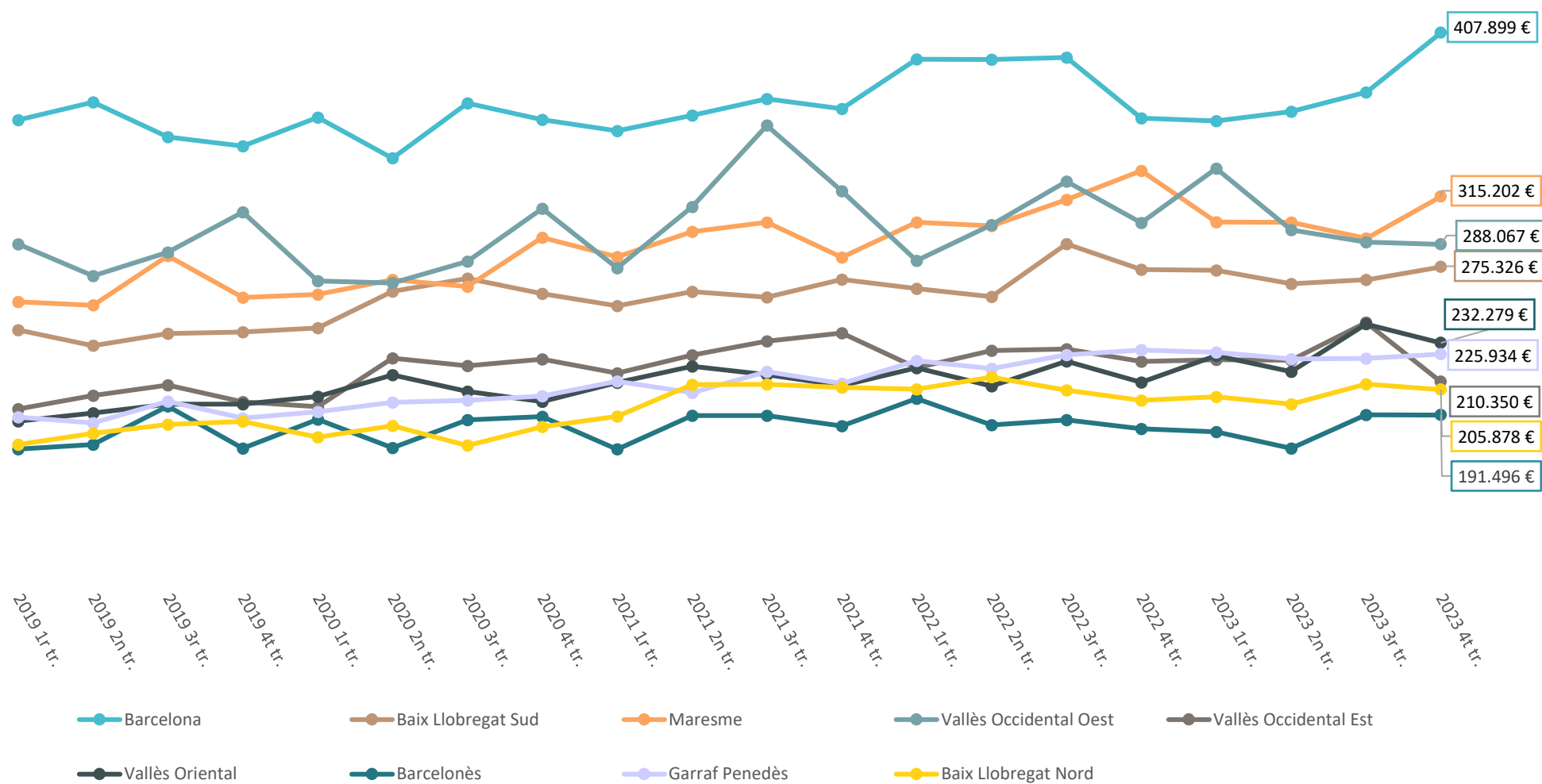
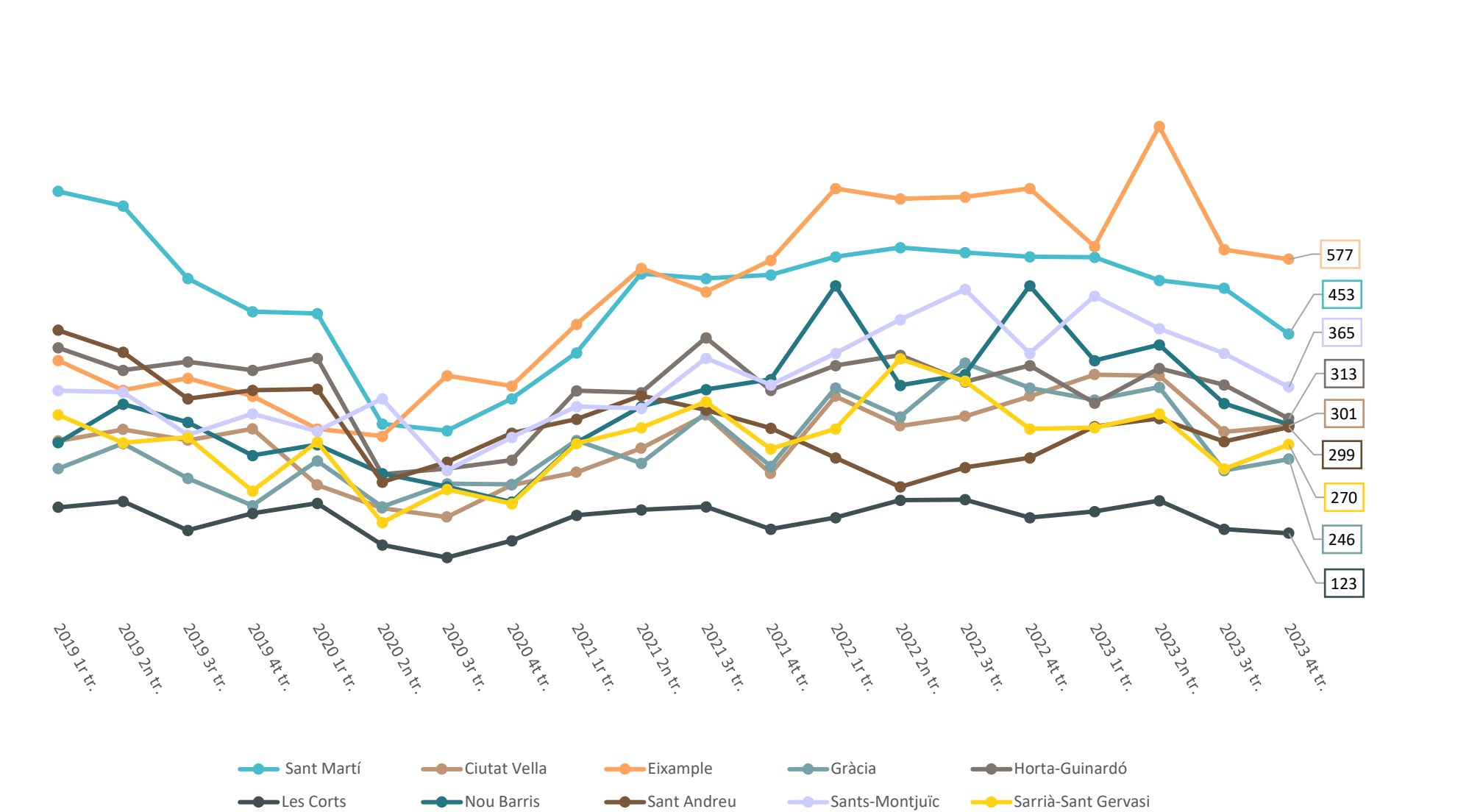
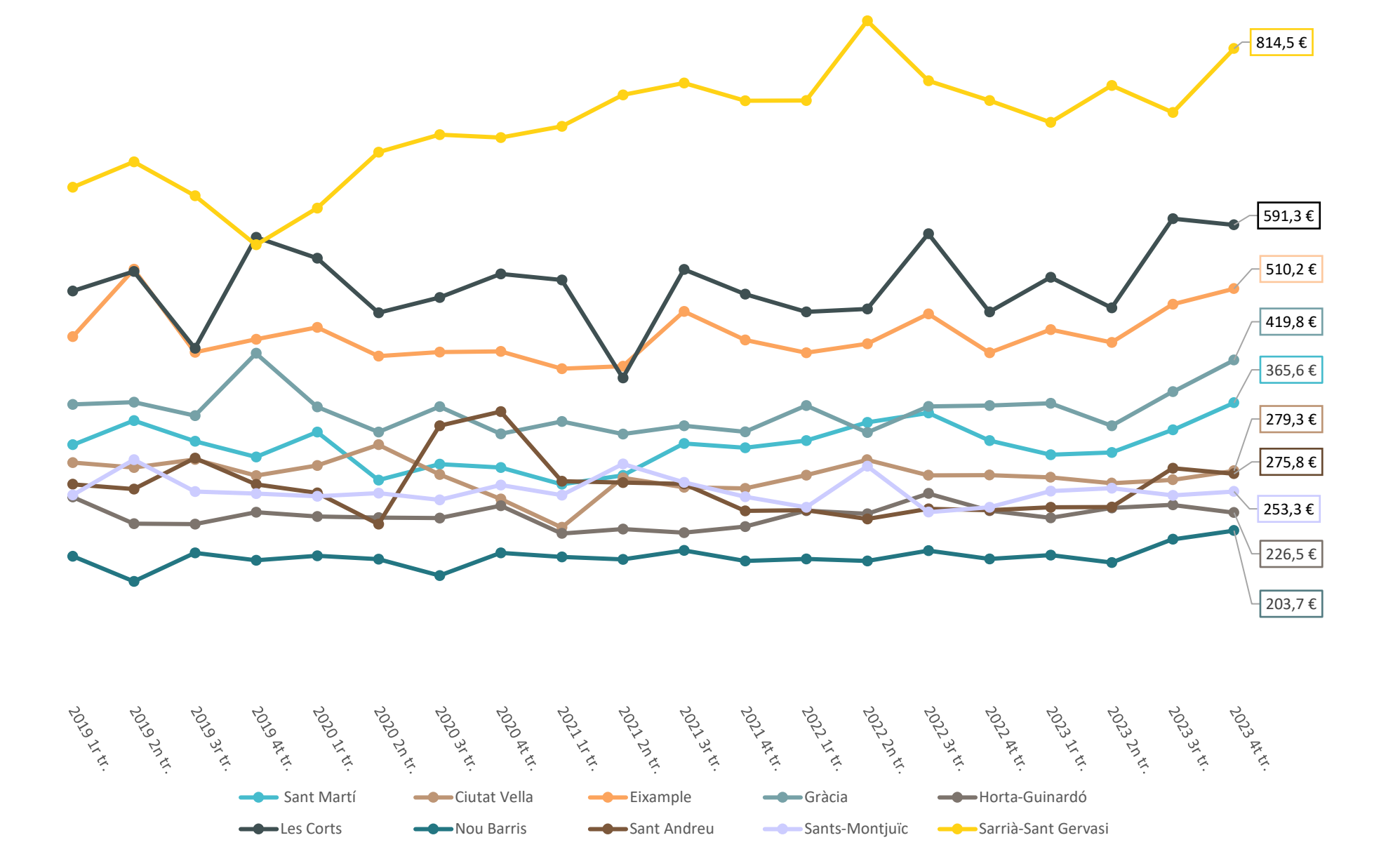


Figure 67: Trend in the average purchase price by quarter and territorial area





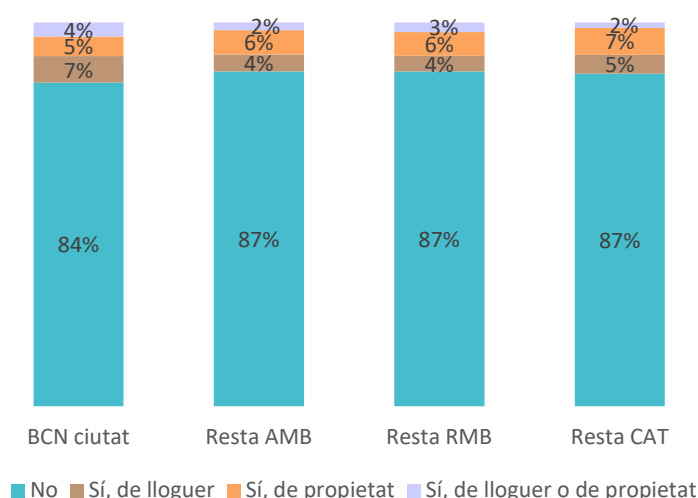


7.2. Analysis of demand

As mentioned at the beginning of this document, it is particularly difficult to analyse the trend in demand for rental and for-sale housing due to the lack of publicly available data. The existing data on this subject usually comes from the property listing websites themselves, which use the number of contact requests for published advertisements as a metric for calculating demand, but ignore other relevant metrics such as the number of visits to the advertisement or the number of times the advertiser has actually been contacted.

Given this limitation, it is necessary to rely on surveys and questionnaires to approximate an analysis of housing demand. For that reason, we used the data published in [The Omnibus Survey](#) by GESOP in autumn 2023 and published by the Barcelona Metropolitan Housing Observatory, which asked the question “Are you currently actively looking for housing in Catalonia? To rent or to buy?”.

Figure 70: Responses to the GESOP Omnibus Survey on housing demand



Source: Barcelona Metropolitan Housing Observatory (2024)

The results of the survey show that the majority of respondents (86%) were not actively looking for housing at the time the survey was conducted.

Among those who answered yes, most are looking to buy a property (6% on average), while 5% are looking to rent and 2% are looking for either option. When comparing the results by territory, it can be seen that in the city of Barcelona there is a slightly higher demand for housing in general than in the rest of the territories, especially in the case of rental properties. However, in the rest of the territories (AMB, RMB and the rest of Catalonia), there is

a higher percentage of people looking to buy a property than to rent one.

Approximations to the problem made in other studies can also be used. Different sources show an imbalance between supply and demand in the city and province of Barcelona.

It is true, however, that this must be seen in the context of imbalance both in Spain and internationally. In Spain, these imbalances are particularly evident in the capitals of metropolitan areas, and there is a significant correlation between this imbalance and the rise in prices (San Juan, 2023). Across Europe, housing prices, both for sales and rentals, have experienced a similar rise to that seen in Spain as a whole and in the 27 EU countries (Eurostat, 2023). The low supply combined with a lack of funds for construction, high costs, and lengthy processes, together with growing demand, especially in large cities, could indicate a rise in prices in the future (CBRE, 2024).

When focusing on the city of Barcelona, a study by the Housing Observatory using data from two property websites for the last quarter of 2023 shows that rental demand has remained concentrated below €1,000 per month, while supply is concentrated at prices above €1,600. In the rest of the metropolitan area, an even larger proportion of demand is below €1,000, but in this case part of the supply (28.3%) is also below this threshold, although insufficient to meet demand (74.6%). In the Barcelona province outside the AMB, the disparities are smaller and are only found below €800 (Barcelona Metropolitan Housing Observatory, 2024). Furthermore, the Rental Observatory (2024) highlights that the province of Barcelona is the area of Spain where demand pressure has increased the most (an indicator calculated using the average number of contacts received for housing offers). On average, an offer received 362 contacts during June 2024, more than double that of the next province.

Barcelona is therefore in a highly complex situation, even when taking into account the context of the housing market across the entire continent. The problem becomes more extreme as we approach the Catalan capital, where the differences are irreconcilable. This is related to the high percentage of the population that is forced to change their place of residence for economic reasons, as we saw in the previous section, which is higher in Barcelona than in its surrounding areas.

7.3. Housing turnover on the

market²

This last point aims to address the yearly percentage of housing units that are turned over on the rental or sales market. To do this, data from the INE Population and Housing Census for 2021 was used and combined with data from INCASÒL. The first limitation in this area is precisely the lack of annual updating of the census, which restricts the validity of the calculations of housing turnover in the market.

Firstly, the aim was to analyse the percentage of housing turnover in the rental market during the period from 2019 to 2023. The results (Figure 71) show a higher percentage of rental housing turnover in the first metropolitan ring, including some municipalities in the second ring, especially in Vallès Occidental. Differences can also be observed between coastal municipalities (with turnover rates for total housing units of between 0.9% and 1.6%) and inland municipalities (between 0% and 0.8%), with the former having higher rates of rental housing turnover.

In terms of geographical areas, the territories with the highest turnover in the rental market are Vallès Occidental Oest and Maresme, whereas those with the lowest turnover are Garraf-Penedès and Vallès Oriental.

However, when observing the results of housing turnover in the sales market during the period analysed (Figure 72), it can be seen that there is a greater housing turnover in the sales market around the city of Barcelona, with average turnover rates of between 0.6 and 0.9%, compared to just 0.4% in Barcelona city.

The areas with the highest turnover in the sales market are Baix Llobregat Sud and Garraf-Penedès, whereas those with the lowest turnover are Vallès Oriental and also Garraf-Penedès. The latter is due to the fact that the territory includes municipalities with a high turnover of homes on the market (such as Sitges, Cubelles and Sant Pere de Ribes), but also municipalities where turnover is practically zero (Font Rubí, Gualba, Martorelles, Subirats, etc.).

² The OHB uses the turnover index in some of its studies. It is a synthetic index that calculates the number of contracts that have expired on housing units for which a contract was in force at the end of the previous year. It is important to differentiate this index from the calculation made in this document, which focuses on calculating

the number of rental or purchase contracts signed in a year out of the total number of housing units existing according to the INE Population and Housing Census.

Figure 71: Housing unit turnover rate in the rental market. 2019-2023.

Percentatge de rotació d'habitatges al mercat de lloguer

2019-2023

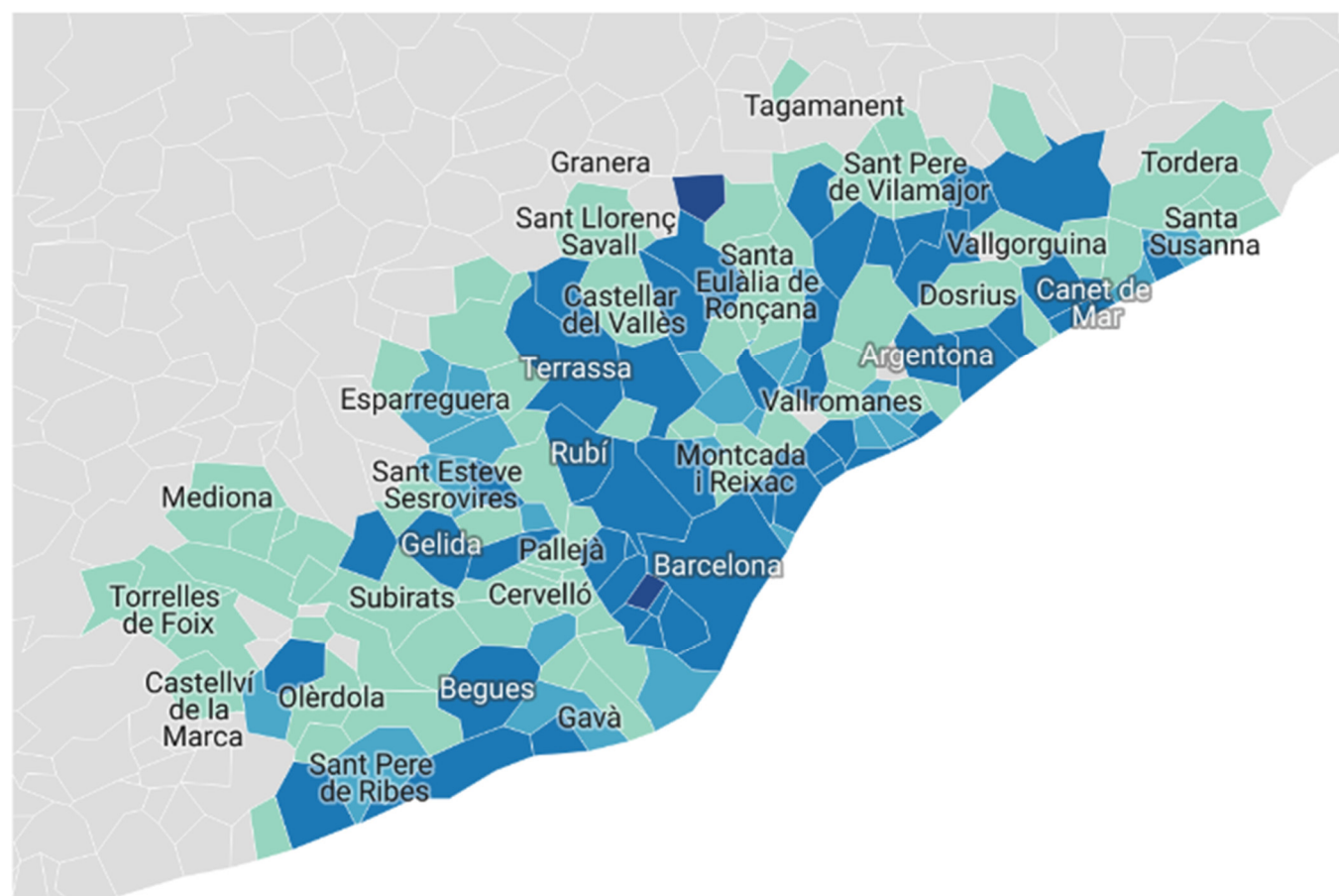
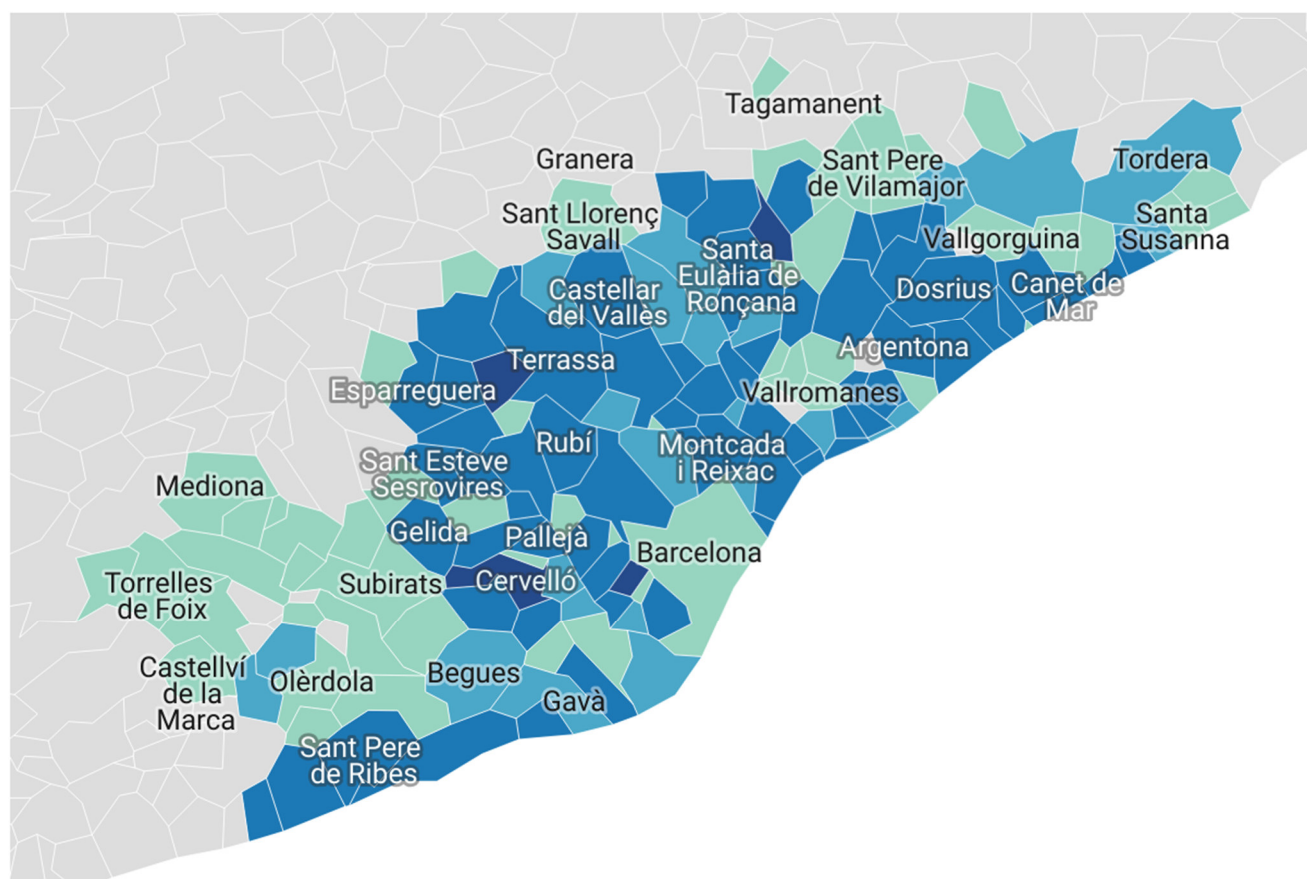


Figure 72: Housing unit turnover rate in the sales market. 2019-2023.

Percentatge de rotació d'habitatges al mercat de compravenda

2019-2023



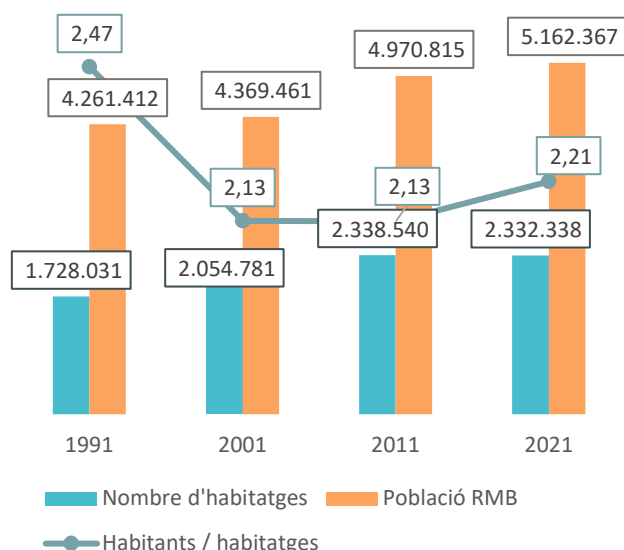
7.4. The relationship between population growth and housing

One of the central elements in recent debates on the issue of housing has been the idea that the cost of access has increased because the housing stock has not grown at the same rate as the population. To study this phenomenon, the trend in the number of occupants and housing units in the Metropolitan Region was compared (Figure 73). The INE population and housing unit censuses from 1991 onwards were used to analyse this aspect.

As can be seen, the number of housing units increased rapidly between 1991 and 2011, at a rate of 300,000 more housing units per decade. After the 2008 crisis, this trend slowed down, and in the period 2011-2021 some 6,000 housing units were lost. The population, meanwhile, has been growing over the 30 years analysed, with a particularly significant increase in the 2000s, possibly aided by the wave of migration at that time.

The ratio between inhabitants and housing units has remained relatively stable, decreasing at the beginning of the period and increasing slightly during the 2010s.

Figure 73: Trend in the number of housing units, population and their relationship



Source: Original using data from the INE Population and Housing Census (1991, 2001, 2011 and 2021).

Although this variable can give us some idea of the balance between the supply and demand for housing, it

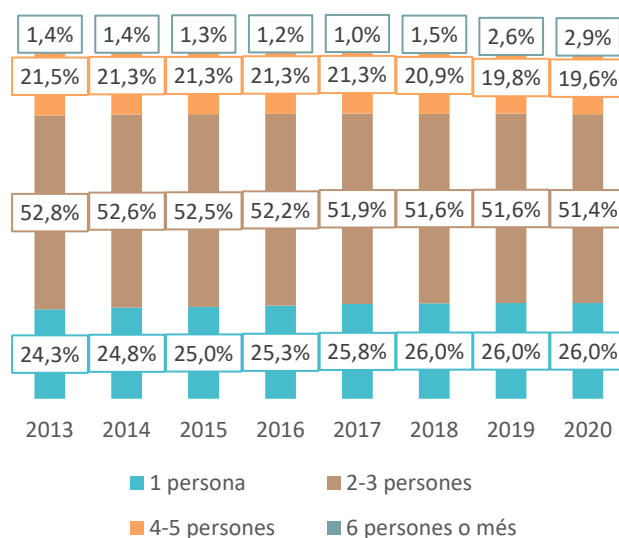
should be borne in mind that it does not capture all demographic changes. Changes such as an ageing population (which tends to live alone more frequently) or smaller households due to a tendency among young couples to have fewer children than previous generations may increase the need for housing with similar proportions of occupants per housing unit.

In fact, when observing the composition of households in Catalonia (Figure 74), a trend of progressive growth at the ends of the scale (households with 6 or more members and single-person households) can be seen, to the detriment of the central ranges (households with between 2 and 5 members).

These figures allow us to observe a dual phenomenon. Firstly, the number of households with six or more people, although still marginal, doubled in the seven years between 2013 and 2020. This could point to an increase in situations of overcrowding due to the inability to access decent housing. Furthermore, one-person households continued to grow steadily throughout the period, exacerbating the problem by further limiting the available housing stock.

Although these figures are for Catalonia as a whole, it is reasonable to assume similar behaviour among households in the Metropolitan Region given its significant weight within the country as a whole.

Figure 74. Households in Catalonia by number of members. 2013-2020

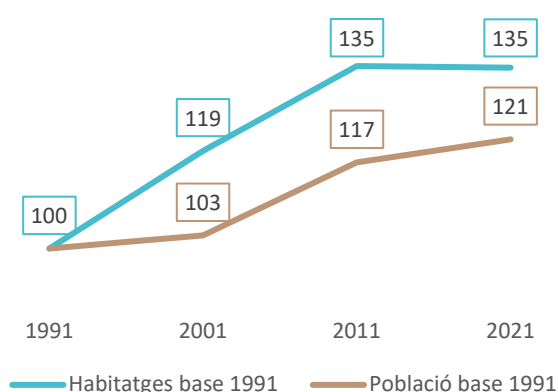


Source: Original, using data from the INE Ongoing Household Survey (2013-2020).

If the figures for 1991 are taken as a baseline of 100 (Figure 75), it becomes easier to observe the differences in the trend. Despite the stagnation of the last decade, housing units have grown at a faster rate than the population throughout the period available.

According to these figures, throughout the period there was an increase in the supply of housing units above the demand, which, not surprisingly, was accompanied by a reduction in the price of housing units. Nevertheless, as noted above, prices have risen.

Figure 75: Trend in the number of housing units and population in the RMB as a whole (1991 = baseline 100)



Source: Original using data from the INE Population and Housing Census (1991, 2001, 2011 and 2021).

If the data is broken down by area, significant differences can be observed between them. Figure 76 shows the growth in population and housing units over the 30-year period analysed for each of the metropolitan areas.

Two large groups can be identified from these figures: firstly, the city centre and the surrounding areas, where there has been minimal or even negative population growth, as is the case in Barcelona city and the Barcelonès area, and secondly, the more outlying areas, where the population has grown considerably. For example, areas such as Garraf-Penedès have seen their population grow by 70%, while Baix Llobregat Nord has practically doubled its population in 30 years.

However, in terms of the trend in housing units, there are smaller differences between areas, although growth in

this respect continues to be much greater in the areas on the outskirts of Barcelona than in those closer to the capital.

Based on these figures, it is reasonable to assume that the areas experiencing the greatest difficulties in accessing housing are Barcelona and the surrounding areas, whereas, as one moves further away from the capital, there should be more housing units available, a hypothesis that is consistent with the reality.

However, when looking not only at population growth or housing stock separately, but the trend in the gap between the two, another equally interesting picture emerges. Firstly, there is a growing difference between the number of housing units and the population, with a significantly higher increase in the number of housing units in the areas of Barcelonès (a difference of 22 percentage points), Vallès Occidental Est (22 p.p.), Barcelona (19 p.p.), Baix Llobregat Sud (16 p.p.) and Vallès Occidental Oest (12 p.p.). In fact, the city of Barcelona is actually losing population while the number of housing units is growing.

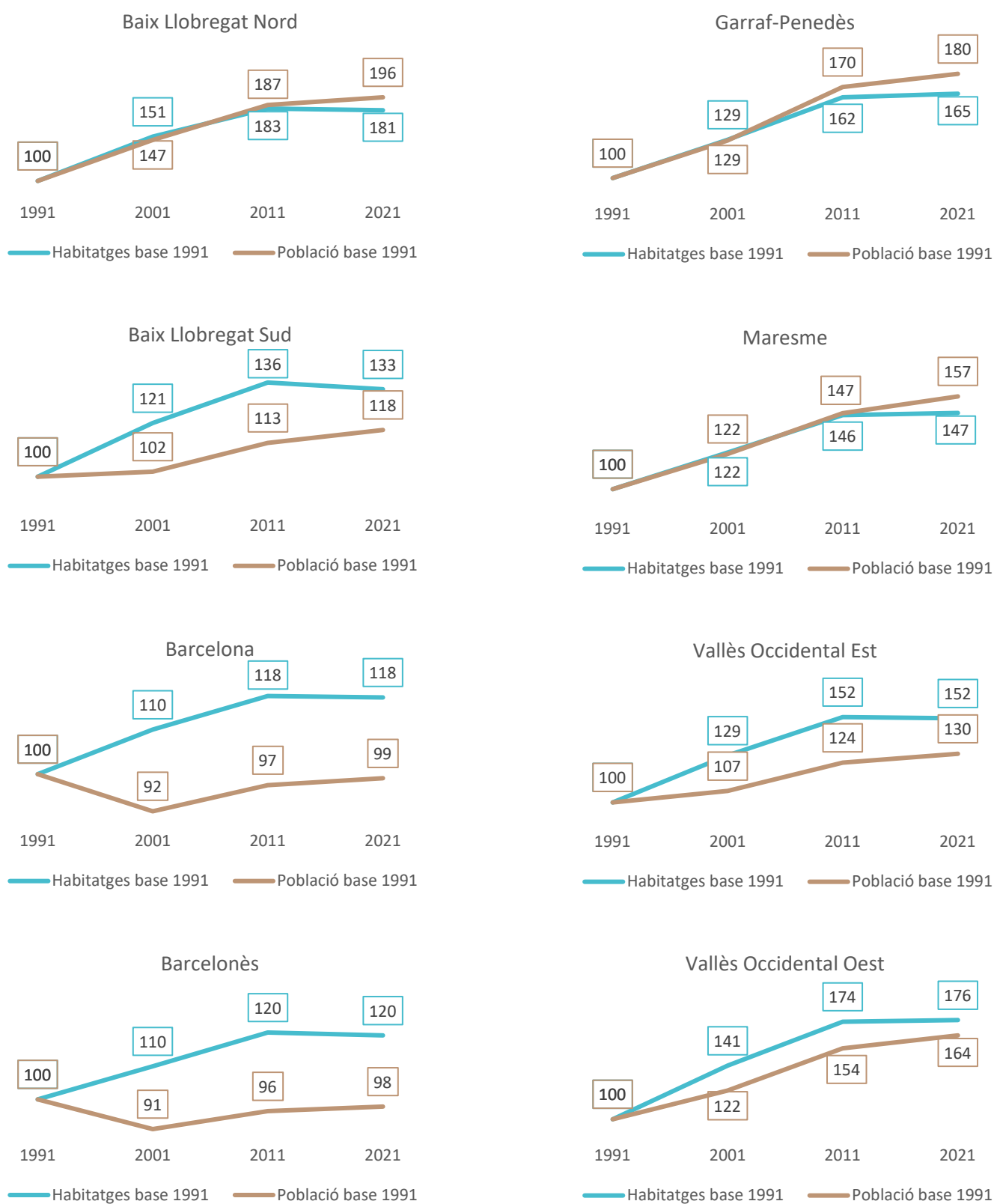
Furthermore, there are areas where this difference has been reversed, and the population has grown faster than the number of housing units. This is the case in Baix Llobregat Nord (15 percentage points difference), Garraf-Penedès (15 p.p.) and Maresme (10 p.p.).

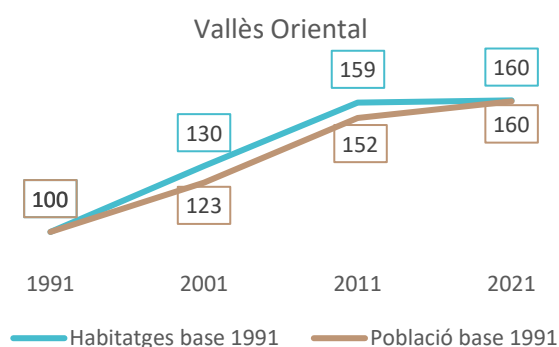
However, these figures do not explain the reason for the increase in difficulties in accessing housing in recent years. Ultimately, the number of housing units has increased in all areas, and this increase has exceeded population growth in the most stressed areas.

Although it is true that the pace of construction slowed down after the 2008 crisis, housing growth in the Barcelona Metropolitan Area has exceeded population growth over the last 30 years.

This fact calls into question the hypothesis that a lack of supply is the only explanation for the increase in housing prices. The explanation, therefore, must also be found in other factors, such as the proliferation of households with fewer members, a high percentage of vacant housing units, or the proliferation of housing units used for tourism.

Figure 76: Trend in the number of housing units and population by area (1991 = baseline 100)





Source: Original using data from the INE Population and Housing Census (1991, 2001, 2011 and 2021).

Key points

In recent years, the property market in the Barcelona Metropolitan Region has undergone a noticeable change, with a significant reduction in the number of properties available to rent and buy, while prices have shown an upward trend.

In the rental market, the number of contracts signed has decreased considerably, especially in the city of Barcelona. In parallel to this, rental prices have increased.

With regard to the sales market, the COVID-19 pandemic caused an initial reduction in the number of transactions, but a recovery has since been observed in some areas. However, this recovery has been more moderate or non-existent in other areas. Sale prices have continued to rise. In Barcelona city, the increase has been more moderate, but with notable differences between districts.

During the period of application of Law 11/2020, the rental market did not show significant variations in the number of contracts or prices. However, once this regulatory period ended, there was a decrease in the number of contracts signed and an increase in prices, especially in urban areas such as Barcelona.

Although the population and the number of housing units have grown at a faster rate than the population over the last 30 years in the RMB as a whole, the opposite has happened in the areas close to Barcelona. In addition, the 2008 crisis brought new housing construction to a standstill, further exacerbating this problem.

8. Conclusions / Discussion

This report presents the state of the housing situation in the Barcelona Metropolitan Region, an issue that has gained prominence in recent years due to the housing emergency affecting a significant part of the population, especially in the areas surrounding large cities such as Barcelona.

The different chapters introduce elements which, when combined, provide an overview of the issues surrounding housing in Barcelona. **The Barcelona Metropolitan Region has more than 2,200,000 housing units**, offering diverse environments with very different types of housing, so that it can respond to the needs and preferences of a very diverse population.

The urban fabric of Barcelona (areas of Baix Llobregat Sud, Barcelona and Barcelonès) is characterised by small flats inhabited by few people, whereas the further away from the city, the housing units are larger and households have more members. **The price, however, does not seem to be so closely related to proximity to Barcelona.** Although Barcelona and Baix Llobregat Sud have very high prices, the rest of the areas do not seem to follow suit. **Prices may be influenced by other factors beyond the proximity to Barcelona, such as the characteristics of the housing units in each area, connectivity with the capital, proximity to other job hubs or even to the coast.** Despite the difficulty in identifying patterns in prices, it would appear that there is a general desire to live close to the city centre and a willingness to make sacrifices in terms of quality of housing, such as having less space or living in older buildings.

Broadly speaking, **prices have continued to rise in recent years**, with Barcelona being the area most affected. **The supply of rental properties has recently decreased while prices have increased across all territorial areas.** Meanwhile, **the sales market has seen a more moderate increase**, although the supply has fluctuated. There is clearly an imbalance between supply and demand. The latter requires housing units at prices well below market value, forcing those who cannot afford

the rising costs to relocate to more affordable areas. This imbalance particularly affects the city of Barcelona, where there is a high concentration of demand alongside a supply priced well above the demand price.

The halt in housing construction since the 2008 crisis is another factor that contributes to this imbalance. Although the **RMB has experienced growth in housing units that exceeds population growth over the last 30 years**, a trend that is particularly noticeable in areas closest to Barcelona, **this has not been enough to balance supply and demand.** This imbalance therefore brings into play other factors that have been observed in this report. Among these, the change in the composition of households, with the dual trend of the **proliferation of one-person households and an increase in households with six or more people**, means that, despite the increase in the number of housing units, it is not enough to meet demand. That said, **the number of existing housing units cannot be equated with supply.** Vacant housing units could account for a significant percentage of the total housing stock, while **housing units for tourist use** also reduce the total housing supply. **Therefore, it is not simply a question of building new housing units, but of ensuring that the new housing units enter the market for residential use.** Furthermore, it is necessary to **understand the socio-demographic changes that are taking place in society.** Specifically, **further study is needed on changes in household composition** in order to guide effective policies to address the challenges that arise.

Problems accessing housing are exacerbated by the lack of social housing, which accounts for less than 3% of the metropolitan housing stock. The **proliferation of housing units for tourist use concentrated in the city of Barcelona and coastal areas** is another factor that further exacerbates the situation, as **nearly 1% of the metropolitan housing stock is used for this purpose.**

Given that access to housing affects certain groups in particular, such as young people and those born in countries in the Global South, these sections of the population are doubly affected by problems with access to housing. Furthermore, some of these groups, such as foreigners of certain nationalities, may suffer an additional effect of discrimination. **These profiles are seen in lower quality housing units, with less space for the people who live there, or further away from the most sought-after areas.**

Although certain social layers are more affected, the

problems accessing housing directly affect half of the metropolitan population, as it is estimated that around 50% of residents in the RMB will have changed (or would like to have changed) their place of residence during the period 2018-2027. All these people will experience or have already experienced the price increase first-hand. **Young people, this being the group that changes residence most frequently, will be particularly affected**, while only a minority of older people will be affected. These generational differences could lead to a discrepancy in how different age groups perceive the problem, further increasing the difference in importance that different generations attach to the housing problem³.

Despite what one might expect, the residential mobility process is not satisfactory in all circumstances. Although the degree of satisfaction is higher among people who have moved home than among those who plan to do so, the reason for the change of residence is a determining factor in the degree of satisfaction: people who move in search of a better housing situation or better surroundings are more satisfied than those who are forced to move for work-related or economic reasons or due to external factors.

Although most people change their place of residence to improve their living conditions or for family reasons, between 20 and 25% of those who have changed their place of residence in the last five years have done so for economic reasons. With the upward trend in rental and sales prices, this percentage is expected to increase over the next five years, even though the people themselves do not expect to move again. Furthermore, **the low level of mobility towards Barcelona indicates that the city is pushing people out to the suburbs in a one-way direction**.

In conclusion, these pages have shown how housing is a complex problem that affects a significant portion of the metropolitan population. As this is an issue that is affected by a multitude of factors, there are no easy solutions to resolve it. **The solutions proposed must be as complex as the problem they seek to solve. We are undoubtedly facing one of the greatest problems of today's society, and solving it will be the greatest**

challenge of a generation.

³ According to the CIS Barometer for November 2024, more than 20% of people under 35 in Catalonia consider housing to be their main problem, while this percentage falls below 3%

for those over 55. <https://www.cis.es/es/detalle-ficha-estudio?idEstudio=14858>

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10. Methodological annex

Table 1. Territorial classification of municipalities in the RMB

Municipality	Territorial Area
Abrera	Baix Llobregat Nord
Castellbisbal	Baix Llobregat Nord
Castellví De Rosanes	Baix Llobregat Nord
Collbató	Baix Llobregat Nord
Esparraguera	Baix Llobregat Nord
Martorell	Baix Llobregat Nord
Olesa De Montserrat	Baix Llobregat Nord
Sant Andreu De La Barca	Baix Llobregat Nord
Sant Esteve Sesrovires	Baix Llobregat Nord
Vallirana	Baix Llobregat Nord
Begues	Baix Llobregat Sud
Castelldefels	Baix Llobregat Sud
Cervelló	Baix Llobregat Sud
Corbera De Llobregat	Baix Llobregat Sud
Cornellà De Llobregat	Baix Llobregat Sud
Esplugues De Llobregat	Baix Llobregat Sud
Gavà	Baix Llobregat Sud
Hospitalet De Llobregat, L'	Baix Llobregat Sud

Molins De Rei	Baix Llobregat Sud
Pallejà	Baix Llobregat Sud
Palma De Cervelló, La	Baix Llobregat Sud
Papiol, El	Baix Llobregat Sud
Prat De Llobregat, El	Baix Llobregat Sud
Sant Boi De Llobregat	Baix Llobregat Sud
Sant Climent De Llobregat	Baix Llobregat Sud
Sant Feliu De Llobregat	Baix Llobregat Sud
Sant Joan Despí	Baix Llobregat Sud
Sant Just Desvern	Baix Llobregat Sud
Sant Vicenç Dels Horts	Baix Llobregat Sud
Santa Coloma De Cervelló	Baix Llobregat Sud
Torrelles De Llobregat	Baix Llobregat Sud
Viladecans	Baix Llobregat Sud
Barcelona	Barcelona
Badalona	Barcelonès
Sant Adrià De Besòs	Barcelonès
Santa Coloma De Gramenet	Barcelonès
Avinyonet Del Penedès	Garraf Penedès
Cabanyes, Les	Garraf Penedès
Canyelles	Garraf Penedès

Castellví De La Marca	Garraf Penedès
Cubelles	Garraf Penedès
Font-Rubí	Garraf Penedès
Gelida	Garraf Penedès
Granada, La	Garraf Penedès
Mediona	Garraf Penedès
Olèrdola	Garraf Penedès
Olesa De Bonesvalls	Garraf Penedès
Olivella	Garraf Penedès
Pacs Del Penedès	Garraf Penedès
Pla Del Penedès, El	Garraf Penedès
Pontons	Garraf Penedès
Puigdàlber	Garraf Penedès
Sant Cugat Sesgarrigues	Garraf Penedès
Sant Llorenç D'Hortons	Garraf Penedès
Sant Martí Sarroca	Garraf Penedès
Sant Pere De Ribes	Garraf Penedès
Sant Pere De Riudebitlles	Garraf Penedès
Sant Quintí De Mediona	Garraf Penedès
Sant Sadurní D'Anoia	Garraf Penedès
Santa Fe Del Penedès	Garraf Penedès

Santa Margarida I Els Monjos	Garraf Penedès
Sitges	Garraf Penedès
Subirats	Garraf Penedès
Torrelavit	Garraf Penedès
Torrelles De Foix	Garraf Penedès
Vilafranca Del Penedès	Garraf Penedès
Vilanova I La Geltrú	Garraf Penedès
Vilobí Del Penedès	Garraf Penedès
Alella	Maresme
Arenys De Mar	Maresme
Arenys De Munt	Maresme
Argentona	Maresme
Cabrera De Mar	Maresme
Cabrils	Maresme
Caldes D'Estrac	Maresme
Calella	Maresme
Canet De Mar	Maresme
Dosrius	Maresme
Malgrat De Mar	Maresme
Masnou, El	Maresme
Mataró	Maresme

Montgat	Maresme
Òrrius	Maresme
Palafolls	Maresme
Pineda De Mar	Maresme
Premià De Dalt	Maresme
Premià De Mar	Maresme
Sant Andreu De Llavaneres	Maresme
Sant Cebrià De Vallalta	Maresme
Sant Iscle De Vallalta	Maresme
Sant Pol De Mar	Maresme
Sant Vicenç De Montalt	Maresme
Santa Susanna	Maresme
Teià	Maresme
Tiana	Maresme
Tordera	Maresme
Vilassar De Dalt	Maresme
Vilassar De Mar	Maresme
Badia Del Vallès	Vallès Occidental Est
Barberà Del Vallès	Vallès Occidental Est
Castellar Del Vallès	Vallès Occidental Est
Cerdanyola Del Vallès	Vallès Occidental Est

Gallifa	Vallès Occidental Est
Montcada I Reixac	Vallès Occidental Est
Palau-Solità I Plegamans	Vallès Occidental Est
Polinyà	Vallès Occidental Est
Ripollet	Vallès Occidental Est
Sant Llorenç Savall	Vallès Occidental Est
Sant Quirze Del Vallès	Vallès Occidental Est
Santa Perpètua De Mogoda	Vallès Occidental Est
Sentmenat	Vallès Occidental Est
Matadepera	Vallès Occidental Oest
Rellinars	Vallès Occidental Oest
Rubí	Vallès Occidental Oest
Sabadell	Vallès Occidental Est
Sant Cugat Del Vallès	Vallès Occidental Oest
Tagamanent	Vallès Occidental Oest
Terrassa	Vallès Occidental Oest
Ullastrell	Vallès Occidental Oest
Vacarisses	Vallès Occidental Oest
Viladecavalls	Vallès Occidental Oest
Aiguafreda	Vallès Oriental
Ametlla Del Vallès, L'	Vallès Oriental

Bigues I Riells Del Fai	Vallès Oriental
Caldes De Montbui	Vallès Oriental
Campins	Vallès Oriental
Canovelles	Vallès Oriental
Cànoves I Samalús	Vallès Oriental
Cardedeu	Vallès Oriental
Castellcir	Vallès Oriental
Figaró-Montmany	Vallès Oriental
Fogars De Montclús	Vallès Oriental
Franqueses Del Vallès, Les	Vallès Oriental
Garriga, La	Vallès Oriental
Granera	Vallès Oriental
Granollers	Vallès Oriental
Gualba	Vallès Oriental
Llagosta, La	Vallès Oriental
Lliçà D'Amunt	Vallès Oriental
Lliçà De Vall	Vallès Oriental
Llinars Del Vallès	Vallès Oriental
Martorelles	Vallès Oriental
Mollet Del Vallès	Vallès Oriental
Montmeló	Vallès Oriental

Montornès Del Vallès	Vallès Oriental
Montseny	Vallès Oriental
Parets Del Vallès	Vallès Oriental
Roca Del Vallès, La	Vallès Oriental
Sant Antoni De Vilamajor	Vallès Oriental
Sant Celoni	Vallès Oriental
Sant Esteve De Palautordera	Vallès Oriental
Sant Feliu De Codines	Vallès Oriental
Sant Fost De Campsentelles	Vallès Oriental
Sant Pere De Vilamajor	Vallès Oriental
Sant Quirze Safaja	Vallès Oriental
Santa Eulàlia De Ronçana	Vallès Oriental
Santa Maria De Martorelles	Vallès Oriental
Santa Maria De Palautordera	Vallès Oriental
Vallgorguina	Vallès Oriental
Vallromanes	Vallès Oriental
Vilalba Sasserra	Vallès Oriental
Vilanova Del Vallès	Vallès Oriental