Housing stock maintenance and building land designation
Results of surveys of German municipalities

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New Horizons for Cities and Regions in a Changing World
Suburban Futures – Alternative Development Paths for Stagnating and Shrinking Municipalities

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Structure

• Methods
• Results of the quantitative online survey and comparison to official statistics
• Some case studies (exemplarily)
• Results of the expert interviews (local representatives) in reference to survey results
• Conclusions
Methods

Survey of Municipalities

- Survey supported by the German Association of Cities and the German Association of Towns and Municipalities
- Online survey of 1,550 municipalities (more than 10,000 inhabitants / ca. 14% of all municipalities)
- 365 completed questionnaires (plus 467 incomplete questionnaires)
- Response rate: 26.2%
Methods

Case studies and interviews of municipal experts

- General information about the urban development and problem areas
- Problem perception of the municipalities concerning detached housing areas
- Discussion of adaptation options
## Case Study: Alsfeld

### Key Data

<table>
<thead>
<tr>
<th><strong>State</strong></th>
<th>Hesse</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>District</strong></td>
<td>Vogelsbergkreis</td>
</tr>
<tr>
<td><strong>Population</strong></td>
<td>16,142</td>
</tr>
<tr>
<td><strong>Old-age dependency ratio</strong></td>
<td>41.7</td>
</tr>
<tr>
<td><strong>Population development (2011-2015)</strong></td>
<td>-1 %</td>
</tr>
<tr>
<td><strong>Population forecast 2012 to 2030</strong></td>
<td>-17 %</td>
</tr>
<tr>
<td><strong>Proportion of single family homes</strong></td>
<td>78 %</td>
</tr>
</tbody>
</table>

### Vacancy rate 2011

- **SFH**: 3.5%
- **TFH**: 0.5%
- **MFH**: 1.5%

Data base: [https://www.destatis.de](https://www.destatis.de)

(Data base: [https://wwwRegionalstatistik.de](https://wwwRegionalstatistik.de))
Case Study: Pirmasens

<table>
<thead>
<tr>
<th>Key Data</th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>State</strong></td>
<td>Rhineland-Palatinate</td>
</tr>
<tr>
<td><strong>District</strong></td>
<td>District-free city</td>
</tr>
<tr>
<td><strong>Population</strong></td>
<td>42,295</td>
</tr>
<tr>
<td><strong>Old-age dependency ratio</strong></td>
<td>44.2</td>
</tr>
<tr>
<td><strong>Population development (2011-2015)</strong></td>
<td>-1.3 %</td>
</tr>
<tr>
<td><strong>Population forecast</strong> 2012 to 2030</td>
<td>-10.9 %</td>
</tr>
<tr>
<td><strong>Proportion of single family homes</strong></td>
<td>54 %</td>
</tr>
</tbody>
</table>

Vacancy rate 2011

- SFH
- TFH
- MFH

Data base: https://www.destatis.de
Case studies:
Impressions of the neighbourhoods
Survey results:
Population development on district level

- Saarland
- Thuringia
- Saxony-Anhalt
- Saxony
- Brandenburg
- Northrhine-Westphalia
- Lower Saxony
- Rhineland-Palatine
- Schleswig-Holstein
- Hesse
- Bavaria
- Baden-Wuerttemberg
- Berlin
- Bremen
- Hamburg

Growing
Decreasing

n=299

10.12.2018
Survey results:
Measures to handle shrinkage (municipalities’ level)

„Are measures against stagnation/shrinkage required?“

- Yes: 89%
- No: 11%

n = 279

„Did you already take action against stagnation/shrinkage?“

- Yes: 42%
- No, despite necessity, e.g. for lack of funds: 14%
- No, (no problems with shrinkage): 28%

n = 305
Survey results:
Some measures applied by the municipalities for dealing with shrinkage

- European funding programs (EFRE, ELER, LEADER) for rural development
- Urban development funding for demolition (Stadtumbau Ost und West)
- Village Renewal program (like IKEK)
- Municipal funding of town- and village centres
- Urban historical monuments programs
- Masterplan for the centre
- Land register of vacancies and gaps between buildings
Survey results:
Land management strategy - Pro and contra new building land

### Increasing population
- New designation (severe housing deprivation): 54
- New designation (to generate influx of people): 32
- No new designation (sufficient supply): 16
- No new designation (qualified brownfield development): 2

\( n = 164 \)

### Decreasing population
- New designation (actual lack of living spaces): 14
- New designation (to generate influx of people): 36
- No new designation (sufficient supply): 28
- No new designation (qualified brownfield development): 36
- No new designation (intermunicipal brownfield development): 6

\( n = 184 \)
Arguments for the building land designation are the expensive modernization of old buildings and the competition for inhabitants:

- „...Thinking about the investments to achieve the energy standard and the normal housing standard I believe that demolition or renovation often is the more expensive option than to buy a new plot." (Town in Lower Saxony, 45,000 inhabitants)

- „...the question arises where and to what extent we really have to designate new building land? We have the need for it and towns are facing a competitive pressure." (Town in Saxony, 16,000 inhabitants)

But most of the surveyed municipalities declare their support of internal development:

- „...We don’t enter the competition with the surrounding communities to designate new building land any more." (Town in Rhineland-Westphalia, 41,000 inhabitants)

- „...we can’t designate new building land on and on. That means..., that the inner cities are bleeding away..." (Town in Saxony-Anhalt, 14,500 inhabitants)
Survey results: Changes in single family housing areas

Do you expect changes in single family housing areas?

- Yes: 24%
- No: 40%
- Still uncertain: 36%

n=342

Which changes do you expect?
(Multiple answers possible)

- Vacancies: 51%
- Marketing problems: 48%
- Pressure of recompaction: 26%
- Rising deficits in infrastructure: 25%
- Influx of persons with migration backgrounds: 20%
- Gentrification: 13%
- Influx of lower income groups: 12%

n = 195
**Interview results:**

**Statements regarding the future use of the single-family housing stock**

**Statements on the ongoing existing demand and new user groups:**

- "A Chinese family has bought the butcher’s shop in my town. And there was a Chinaman standing outside my door on Sunday and wanted to buy a house, too." (Town in Rhineland-Palatinate, 4,000 inhabitants)

- “So far vacancies are not an issue ... Currently people invest their money in real estate. (Town in Brandenburg, 2,800 inhabitants)

**Statements on vacancies or impending vacancies**

- „...my nephew is a single child. He has married a single child. There are now four houses in his environment. Should a young couple with one child inhabit them? (Town in Saarland, 7,000 inhabitants)
Survey results: Missing infrastructure in single-family housing neighbourhoods (municipalities’ level)

Missing infrastructure (n=581)

- Public transport: 22%
- Shopping facilities: 19%
- Medical doctors: 16%
- Retirement centers and nursing homes: 13%
- Meeting points for inhabitants: 8%
- Kindergartens: 6%
- Schools: 5%
- Open areas: 4%
- Pharmacies: 4%
- Playgrounds: 3%
Conclusions

• The stock of detached and semi-detached houses is currently still a robust part of the housing market

• Up to now no larger vacancies exist

• Underuse and „inner vacancies“ are wide-spread

• Future danger of a significant oversupply in the single family housing sector against the background of long-term demographic decline and urban migration

• Deep discounts determine the market developments in disadvantaged regions

• Housing property as an old age insurance is no longer working properly

• Until today no tenants’ market

Despite declining populations building land designation is taking place almost everywhere and strengthens vacancy trends

Donut-effect: greater numbers of vacancies in the town and village centres
Thank you very much for your attention!