

Survey among 493 participants of the international trade fair for property and investments

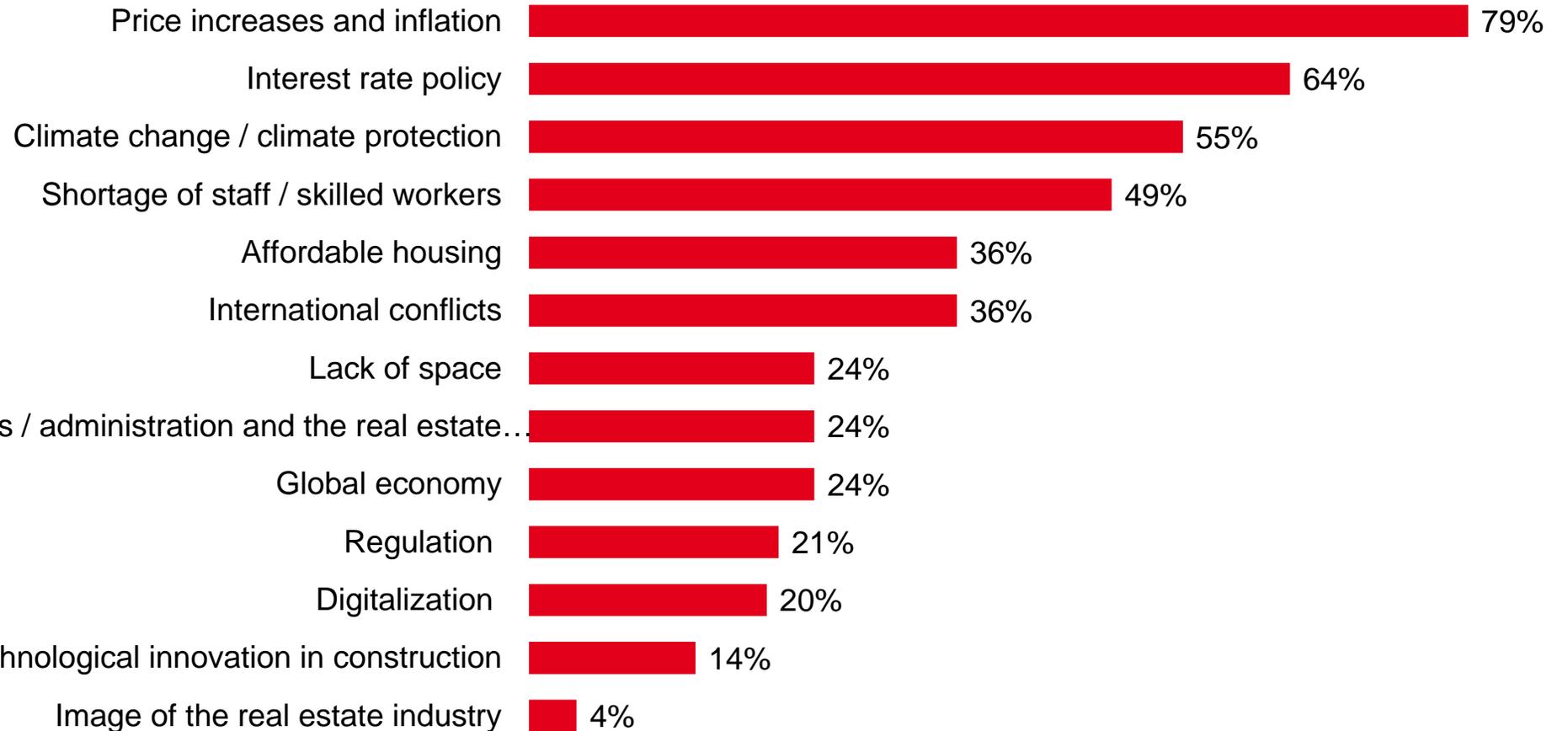
EXPO REAL Trend Index 2022

Topics | Price increases and inflation, ESG, affordable housing, cooperation with the public sector



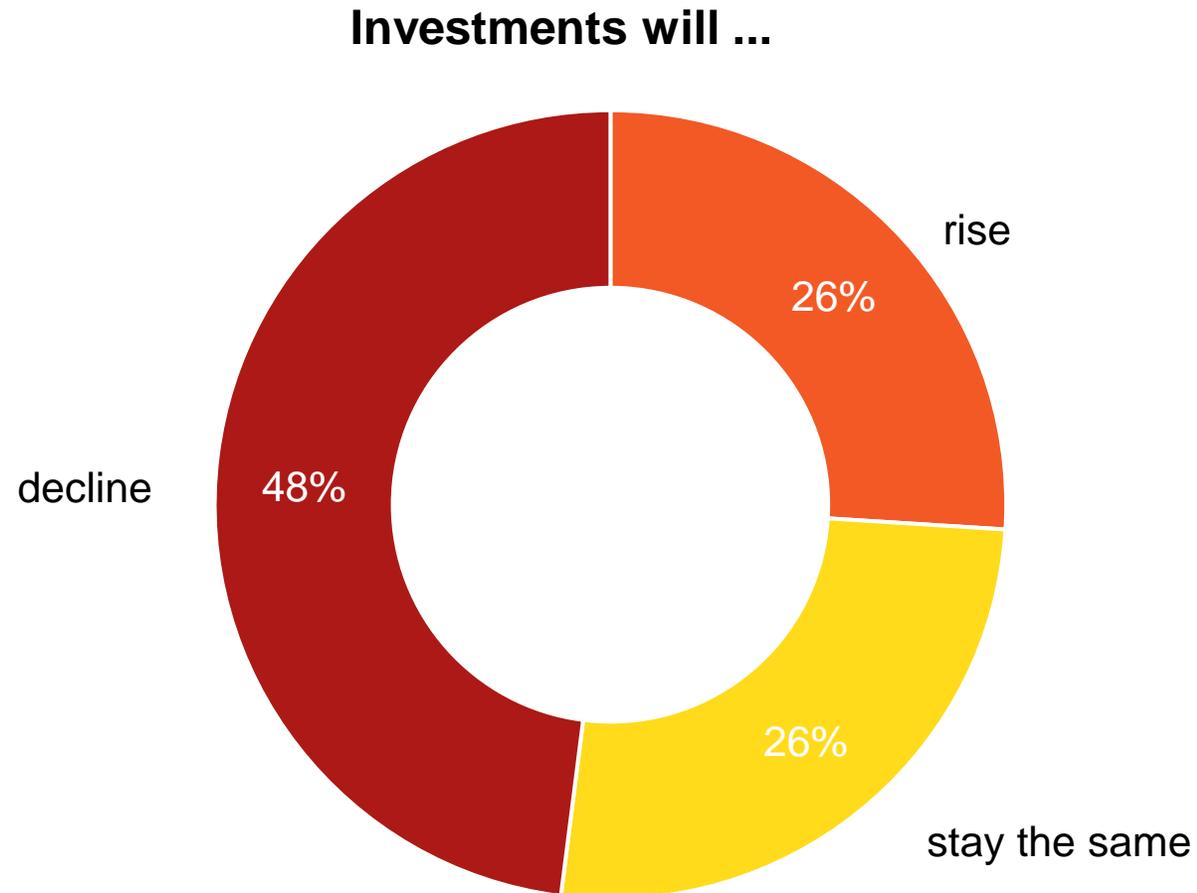
Influencing factors: price increases, inflation and interest rate policy are currently of greater concern to the real estate industry than climate change

Major influencing factors and challenges for the real estate industry



Amounts of money: the sector expects investments in real estate in Germany to remain constant or decline

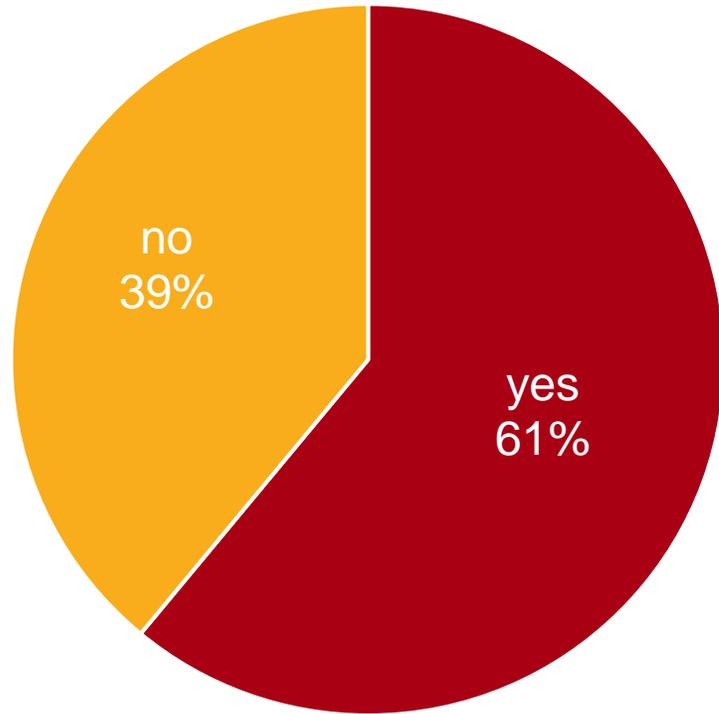
Development of the sums of money invested in real estate in Germany



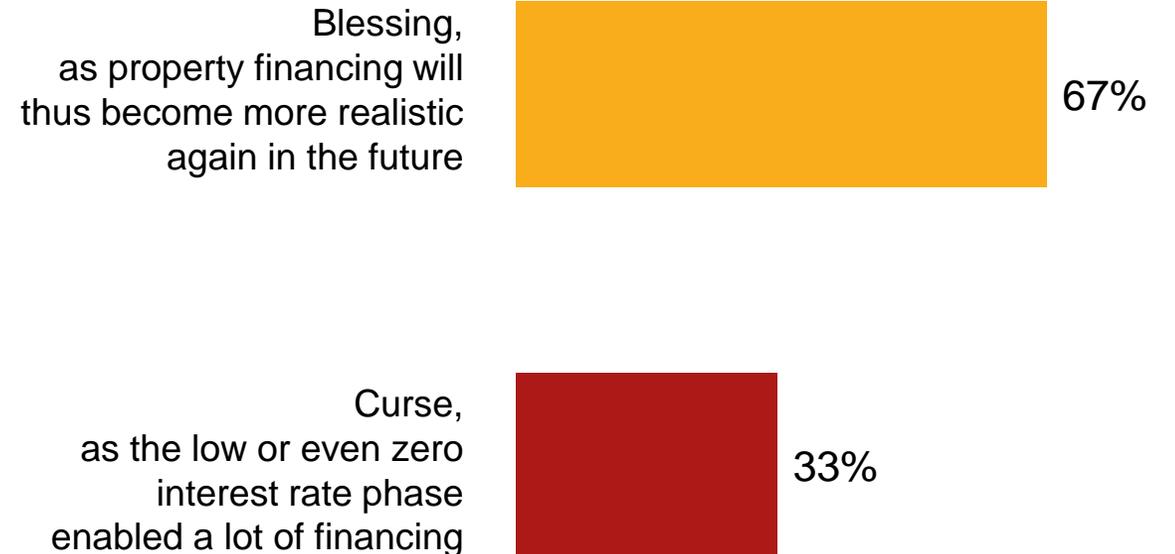
The real estate industry mainly considers interest rate hikes by the ECB to be positive

Interest rate hike as an instrument of the European Central Bank

Stalling of the real estate boom by the ECB

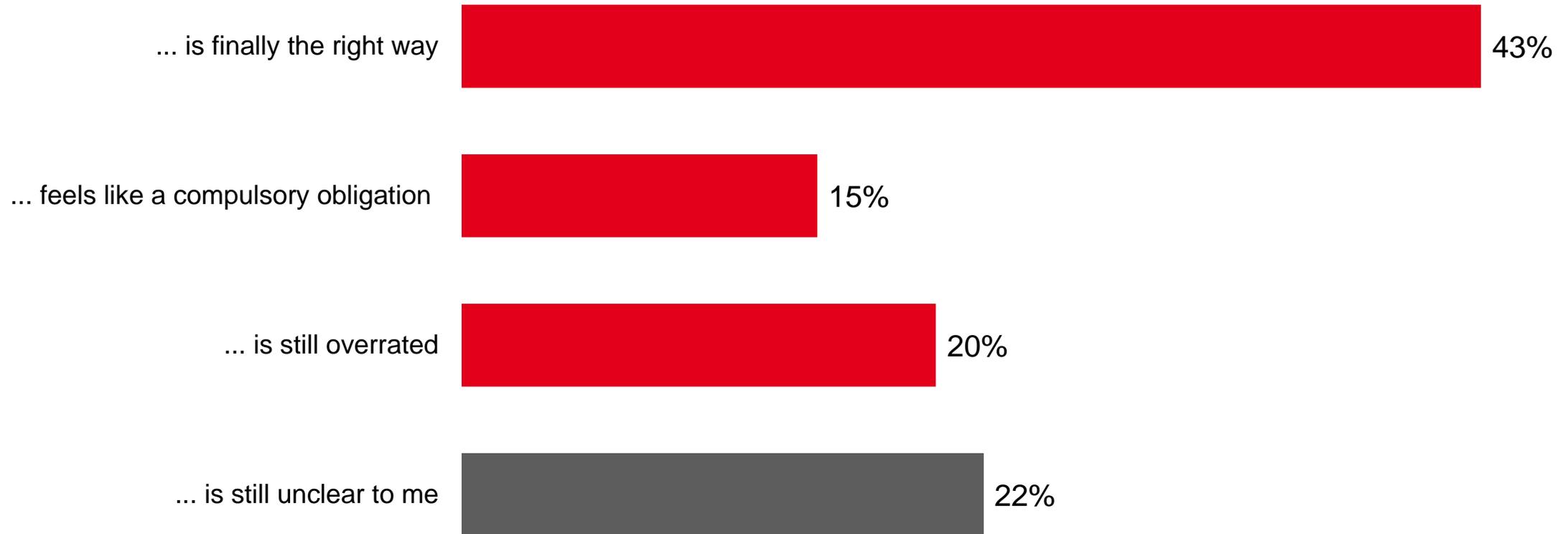


Consequences of interest rate increases by the ECB



ESG as a new criterion cannot (yet) convince everyone; however, one quarter of the industry has not yet adequately addressed the topic

ESG (Environment, Social, Governance) as a new criterion ...



In ESG, all core topics are essential, but many consider Environment most important

Importance in ESG



Climate protection: improving public infrastructure and enhancing ecology in cities are the most important measures

Key levers in climate protection

Enhance ecology in cities (carbon reduction measures such as nature in the city, public transport and expansion of cycle paths, etc.)



Improve public infrastructure (expansion of public transport, energy and water supply, recycling of recyclable materials, etc.)



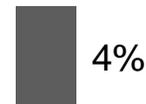
Improve private infrastructure (expansion of public transport, energy and water supply, recycling of recyclable materials, etc.)



Improve early warning systems (know risks and hazards, monitoring, alert services, etc.)

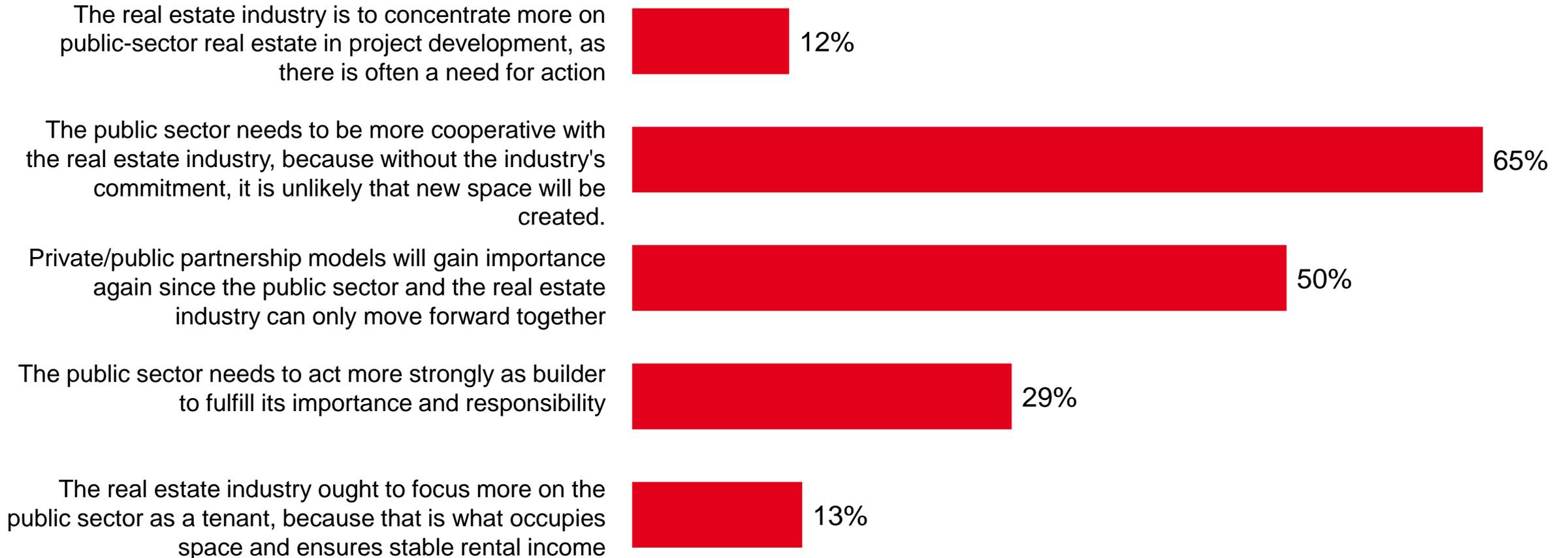


None of the above



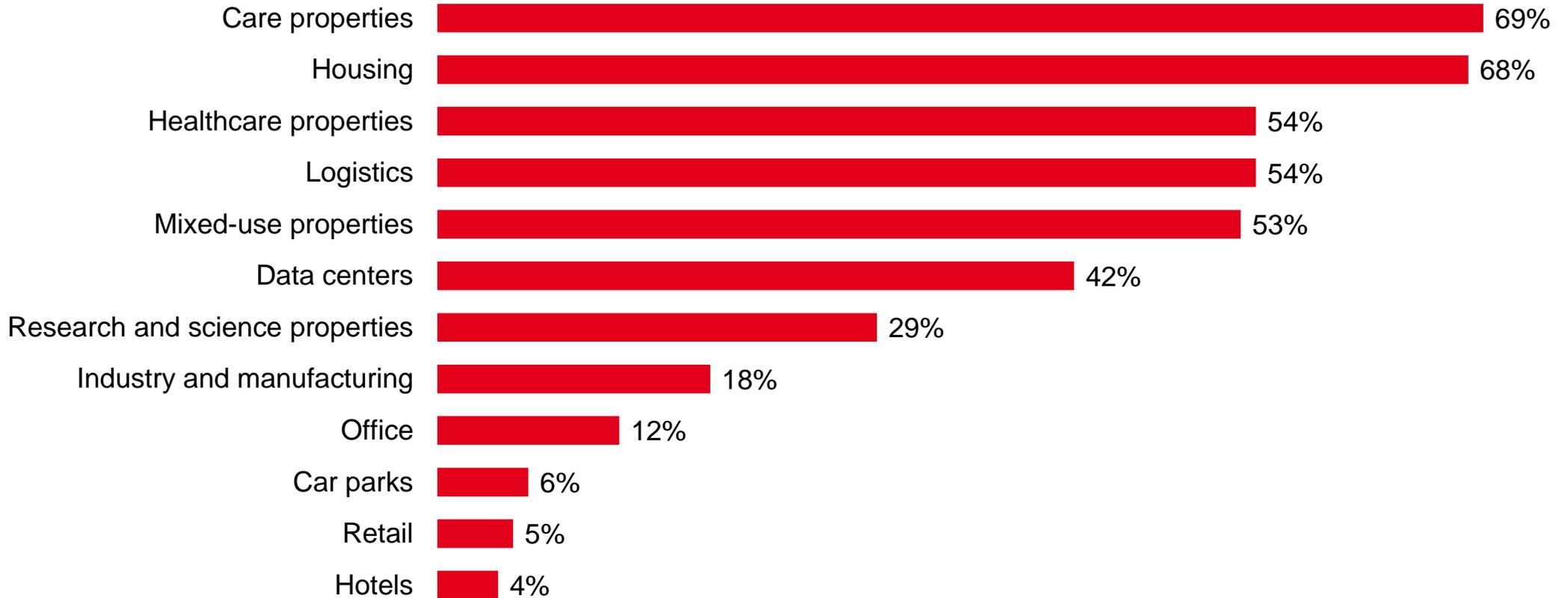
Infrastructure: the real estate industry calls for more commitment on the part of the public sector to develop infrastructure in the cities

Cooperation between the private real estate industry and the public sector



Property types: care and residential properties will continue to grow in importance in the future

Types of property that will gain importance in the future



Property types: senior and subsidized housing will become more important, as will co-working spaces and specialty stores

Types of property that will gain importance in the future—a look into individual asset classes

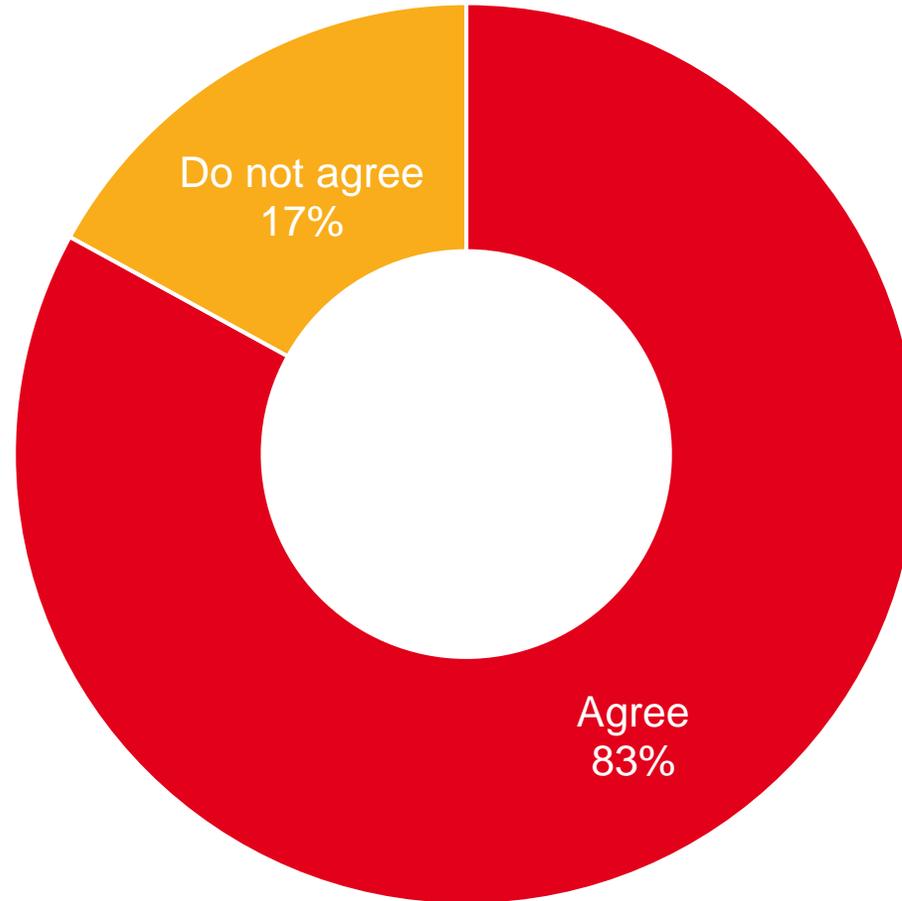


Notes: multiple answers partly possible
 Basis: 493 participants; of these, all participants who believe that the respective type of real estate will gain in importance

Affordable housing: from the real estate industry's point of view, the state cannot solve the problem alone

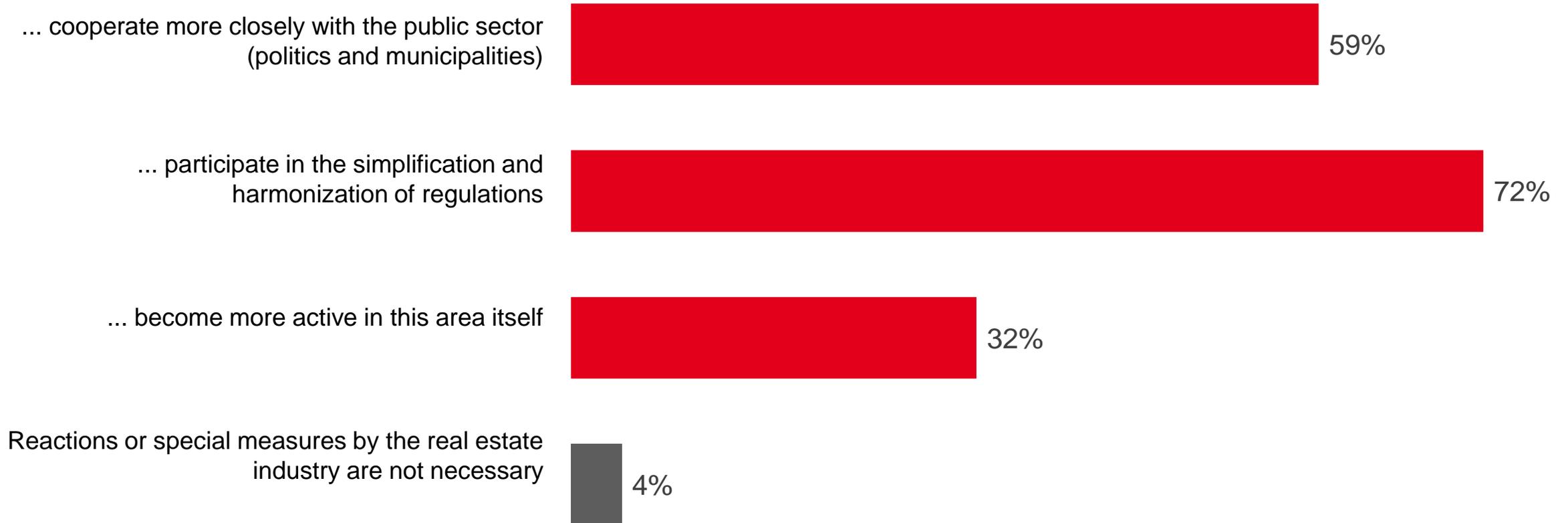
Affordable housing as a problem

Thesis: "State cannot solve the problem"



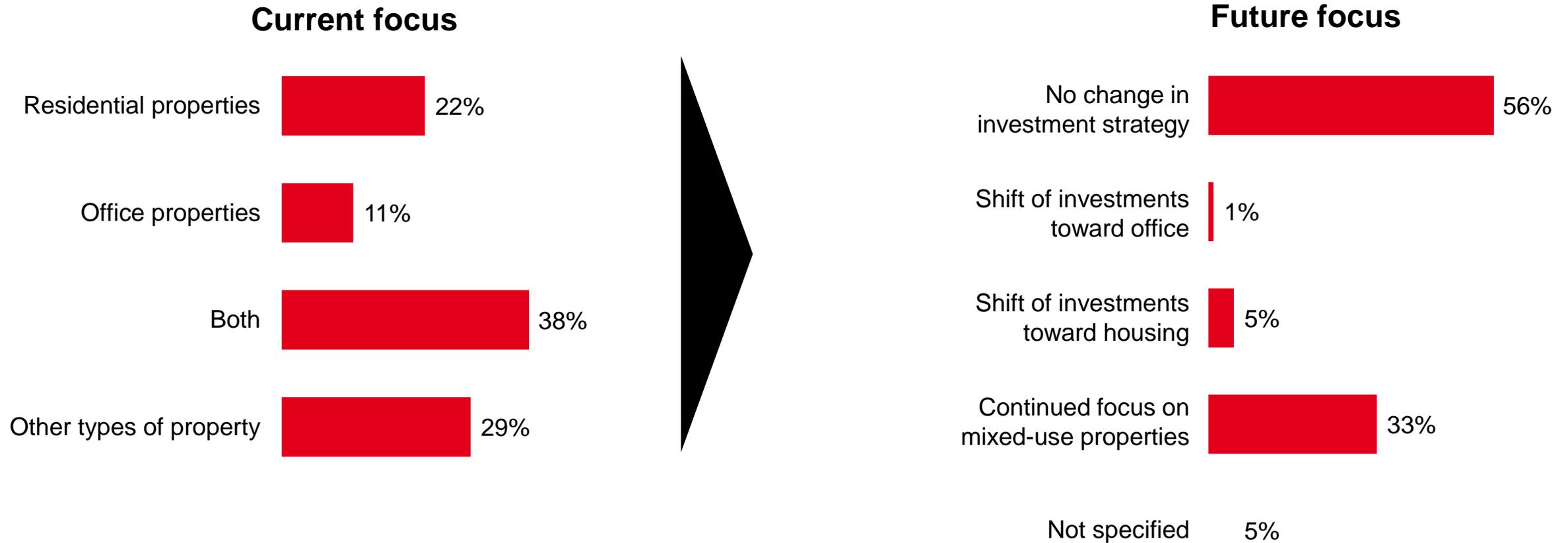
Affordable housing: the sector counts on the simplification of regulations and cooperation with the public sector

For more affordable housing, the real estate industry needs to ...



Investments: most companies do not plan to change their investment strategy

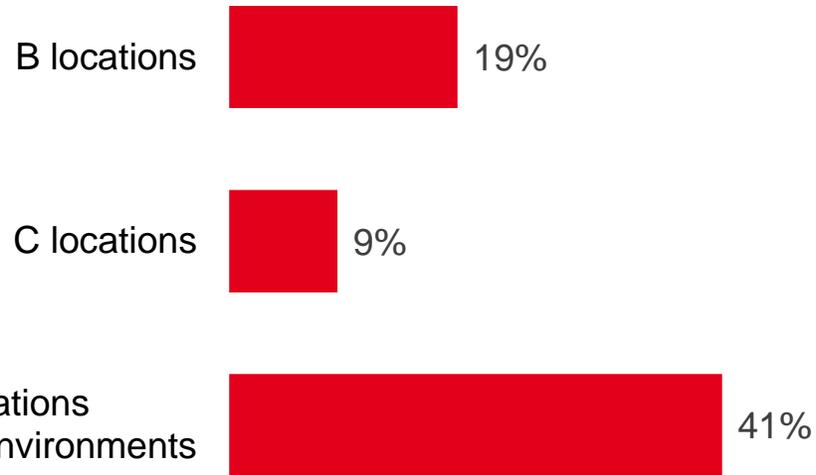
Types of property: current focus of companies and future shift



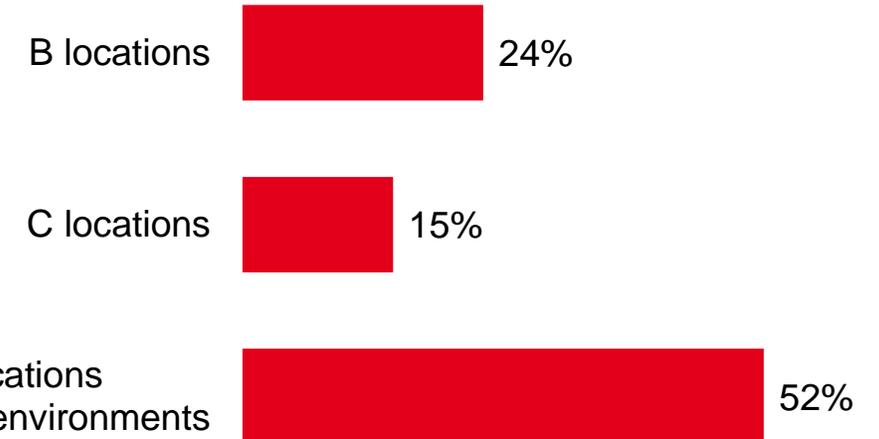
Investments: B or C locations are of particular interest for residential and office properties in metropolitan catchment areas

Future development of investments in B or C locations

Increased investment in office properties in ...



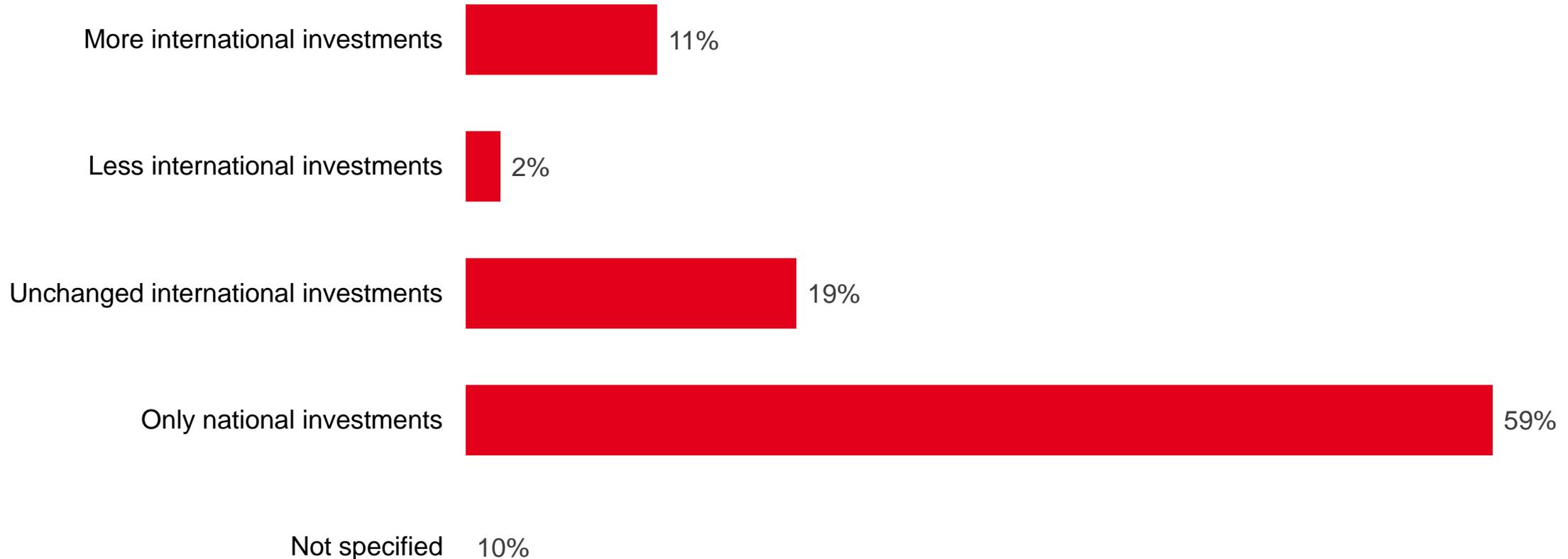
Increased Investment in residential properties in ...



Note: multiple responses partly possible
Basis: 493 participants; all participants answered

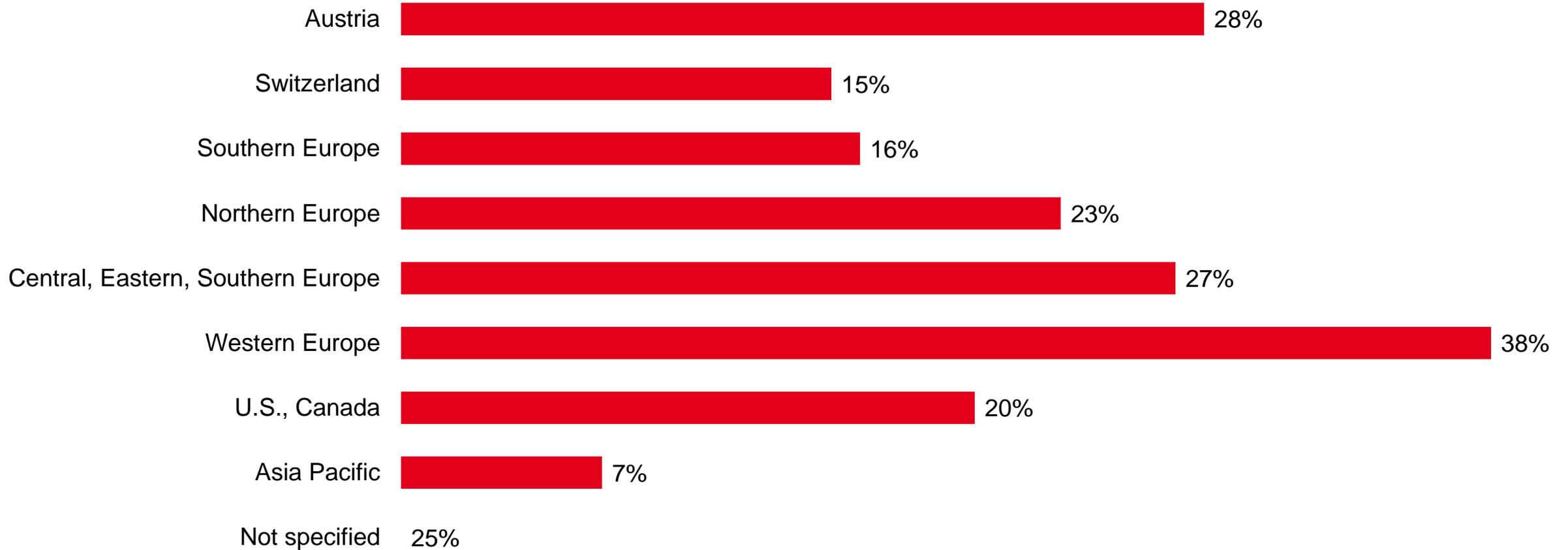
Investments: at present and in the future, the focus of the companies surveyed is and will be clearly on Germany

Development of international investments in the company



Investments: Western Europe and especially Austria is an interesting market for future international investments

Increased investments in international markets



Note: multiple answers possible
Basis: 204 participants who are also planning international investments

493 German exhibitors and visitors were surveyed for the EXPO REAL Trend Index 2022



Survey method

Field period

- July 11–22, 2022

Population

- German exhibitors and visitors of EXPO REAL 2021 and already registered German exhibitors and visitors of EXPO REAL 2022

Survey method

- Anonymous online survey
- Conducted by the polling institute IfaD

Number of interviews

- n = 493; 106 exhibitors and 387 visitors

Economic sector / industry of the participants

