Welcome to our Emerging Trends in Real Estate® Global Report Panel Discussion – Young Leaders’ Perspective

There will be an opportunity to ask our panel questions at the end of the panel discussion. Please use the Zoom Q&A function to submit your questions.

This webinar is being recorded.

Slides will be sent after the event in the follow up email.
Emerging Trends in Real Estate®: Global Report

• Joint publication by Urban Land Institute and PwC

• Amalgamates three in-depth regional reports published end of 2023

• Reflects the views of thousands in the real estate and land use industry

• Supplemented with recent interviews on outlook for year ahead

• Key indicator of sentiment in real estate investment and development trends
After 18 to 24 months of inactivity, of course institutional investors will look at real estate. They will not stay on the sidelines forever.
## Industry concerns: Challenges ahead

### Overall % concerned

<table>
<thead>
<tr>
<th>Region</th>
<th>Interest Rates</th>
<th>Housing affordability</th>
<th>Construction costs and resource availability</th>
<th>Inflation</th>
<th>Cost/availability of finance</th>
<th>Weak economic growth outlook</th>
<th>Geopolitical tensions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NORTH AMERICA</strong></td>
<td>94%</td>
<td>84%</td>
<td>87%</td>
<td>77%</td>
<td></td>
<td></td>
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<tr>
<td><strong>EUROPE</strong></td>
<td>86%</td>
<td></td>
<td></td>
<td></td>
<td>83%</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td><strong>ASIA PACIFIC</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>94%</td>
<td>87%</td>
<td>77%</td>
</tr>
</tbody>
</table>

Source: Survey results from Emerging Trends in Real Estate Asia Pacific, Europe, United States and Canada 2024
For those who want to go back in the market, they will try to stick as closely as possible to the big secular trends, which are underlying growth.

**DEMOGRAPHICS**
- Shifting demographic dynamics
- Migration flows

**DIGITALISATION**
- Generative Artificial Intelligence
- Surging demand for data centres

**DECARBONISATION**
- Green above all
- Opportunity as much as an obligation
Fit for purpose real estate

The great reset

- Beyond the industry adapting to the new era of higher for longer interest rates
- Opportunity for a radical re-think of what will make real estate fit for purpose in the long term

Redefining relationships

- Building owners and occupiers will become more intertwined
- Greater collaboration, dialogue and interaction
- Partnerships

Real estate eco-systems

- Operationally intensive
- Co-location
- Blurring the boundaries in the built environment and infrastructure
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**Moderator**

*Ariana Maaß*
Real Estate Finance, Berlin Hyp AG

*Jan Kowalski*
Head of Development (Poland), Unibail-Rodamco-Westfield

*Laélia Vaulot*
Environmental Strategy Lead, PCA-STREAM
Thank you for attending the webinar. An on-demand recording of this webinar will be available to members on Knowledge Finder soon.

knowledge.uli.org