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# *European Real Estate Conference 2012*

Tipping point!

The years 2012 to 2015 represent a tipping  
point for the global real estate industry

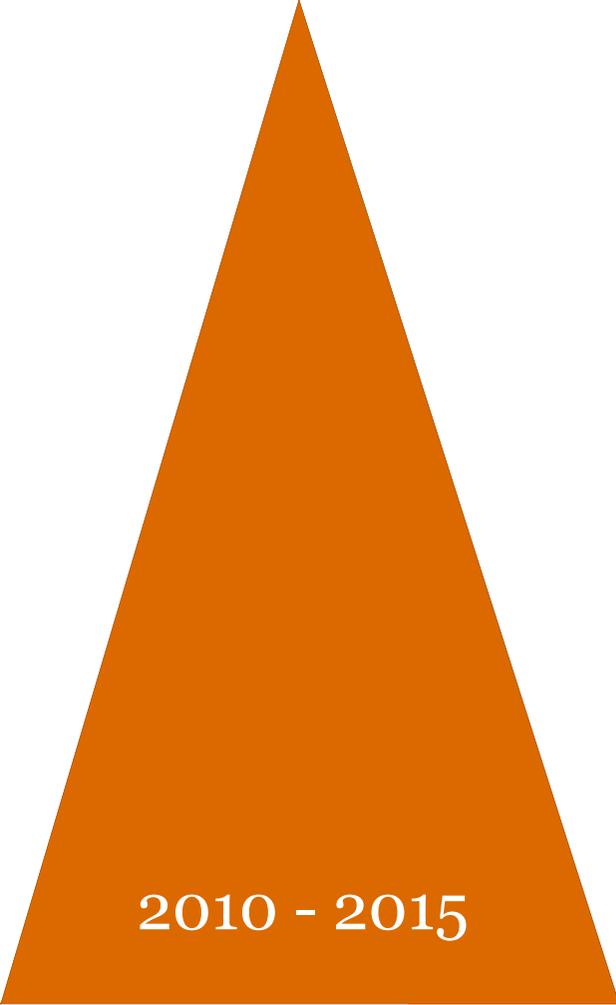
John  
Forbes,  
PwC UK



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# *The tipping point*

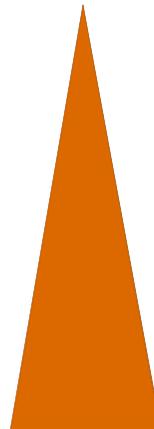


2010 - 2015

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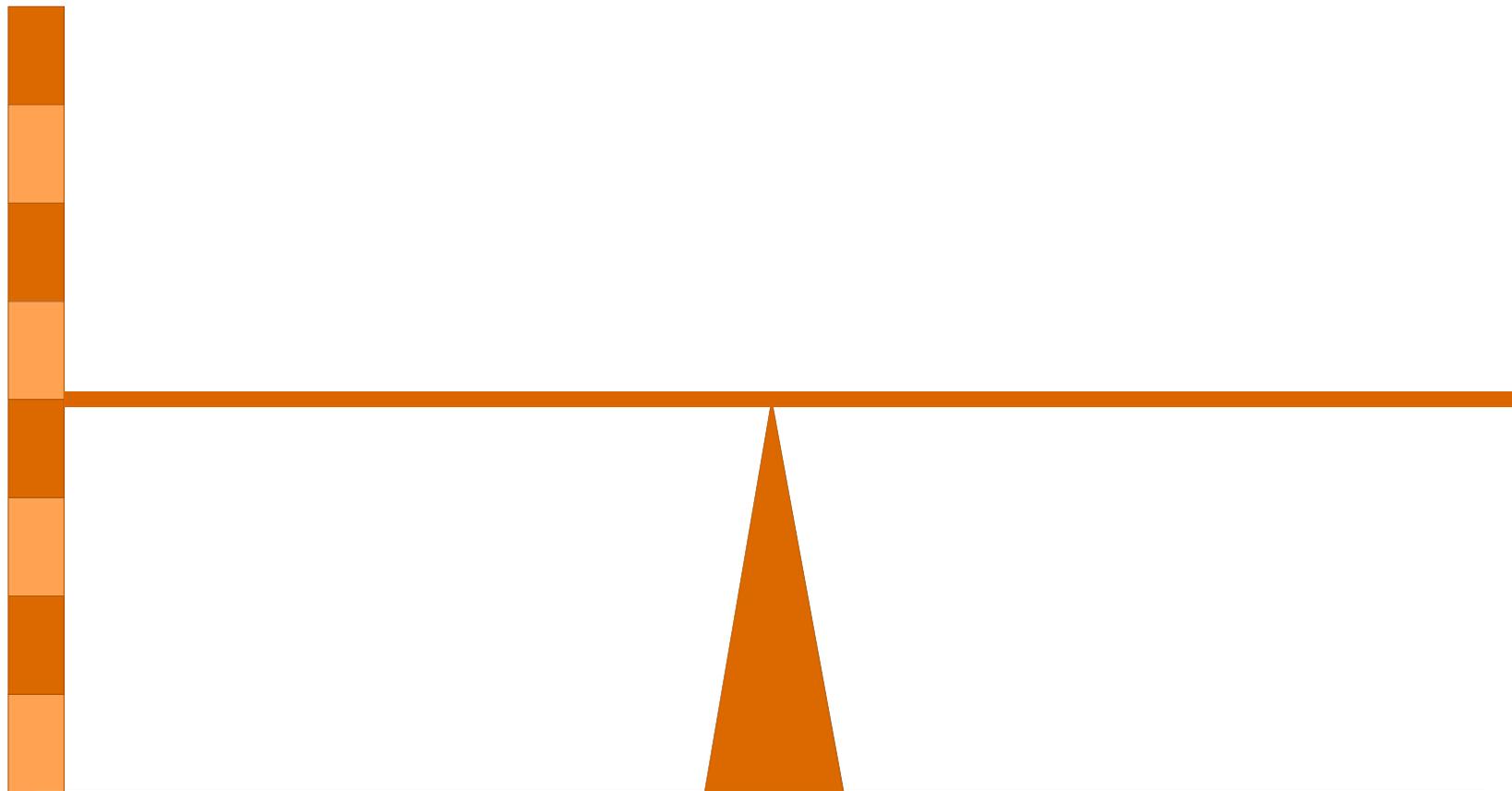
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# *The tipping point*

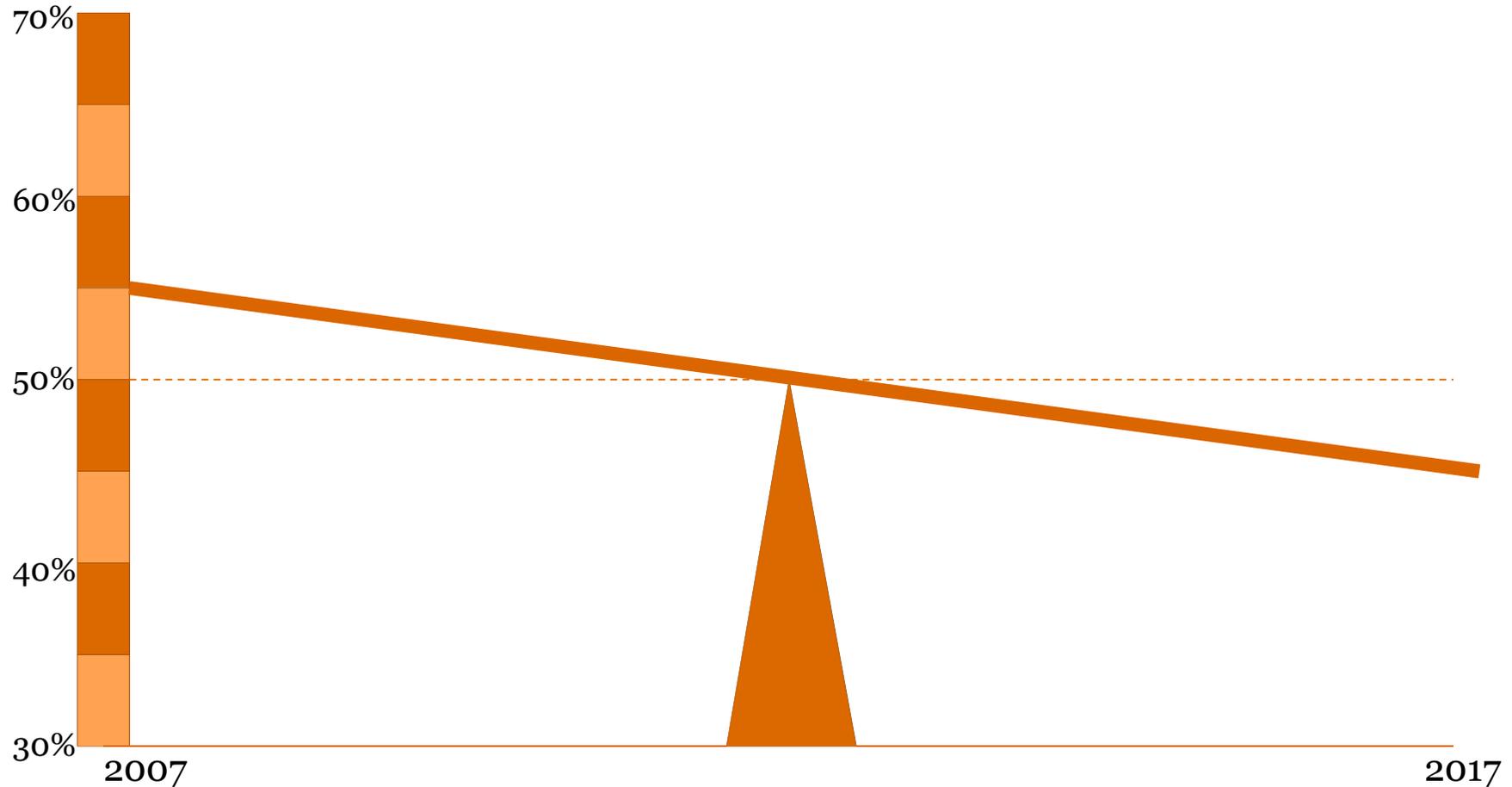


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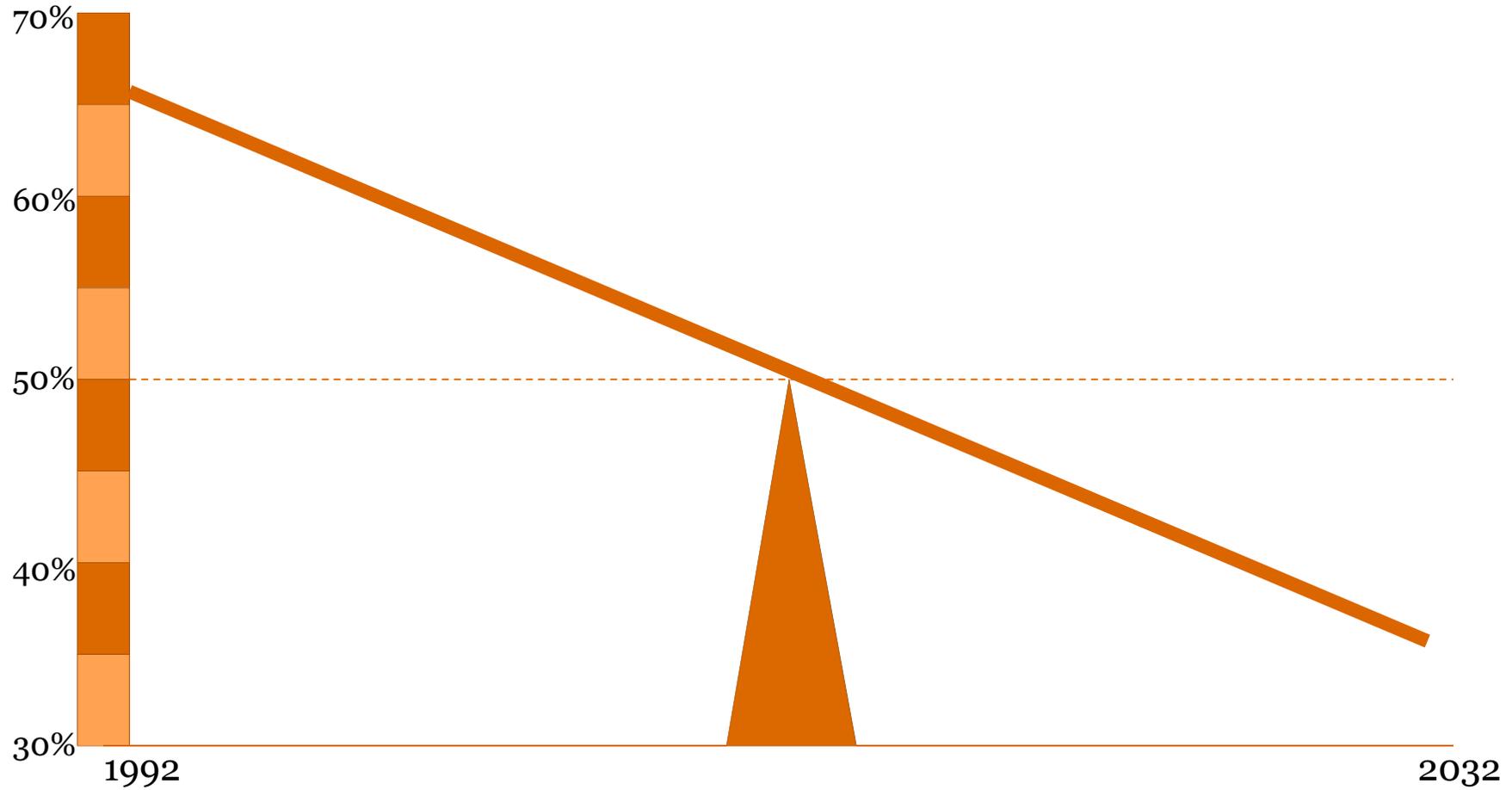
# *The tipping point*



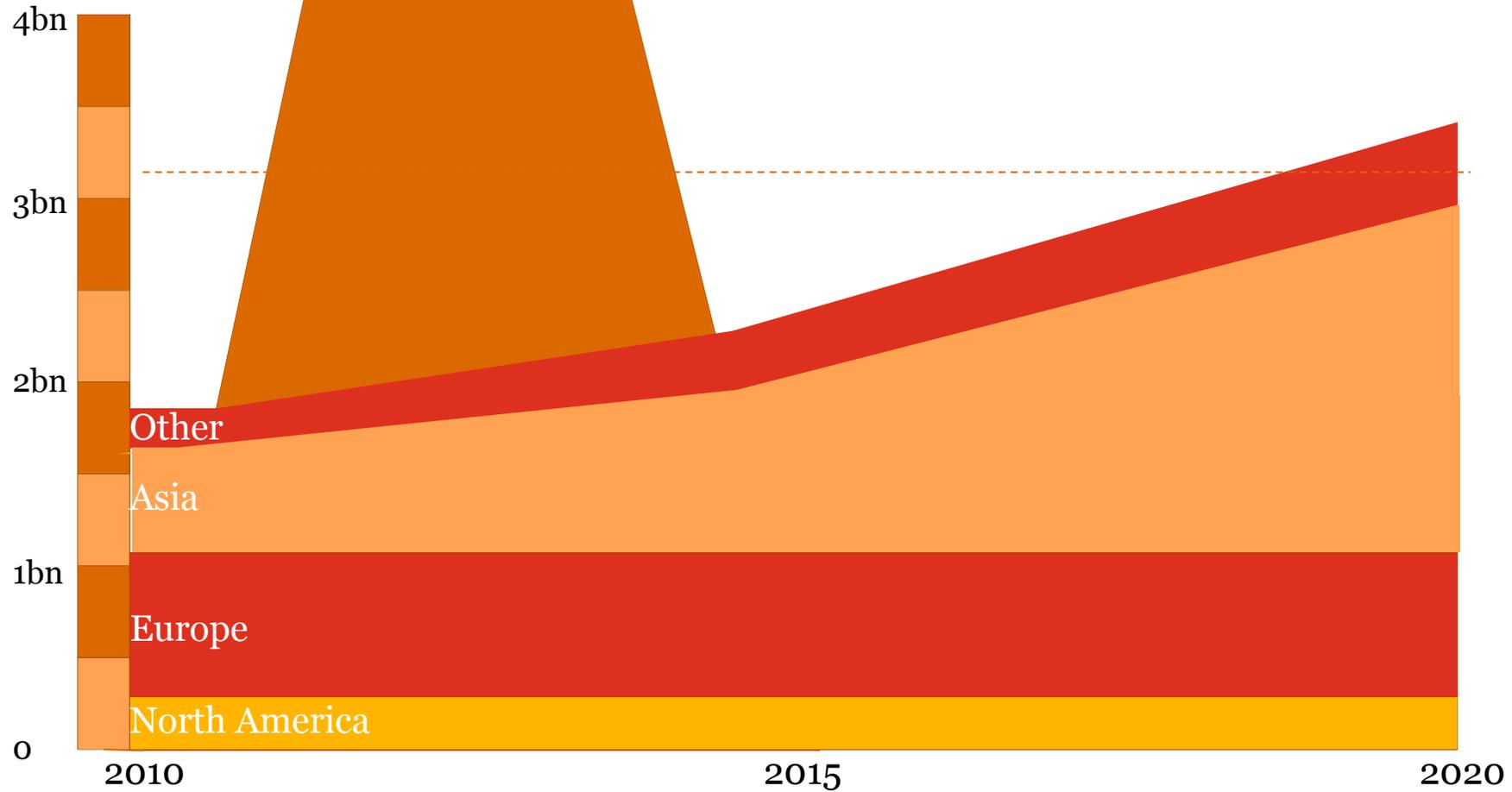
# *Share of world GDP of advanced economies*

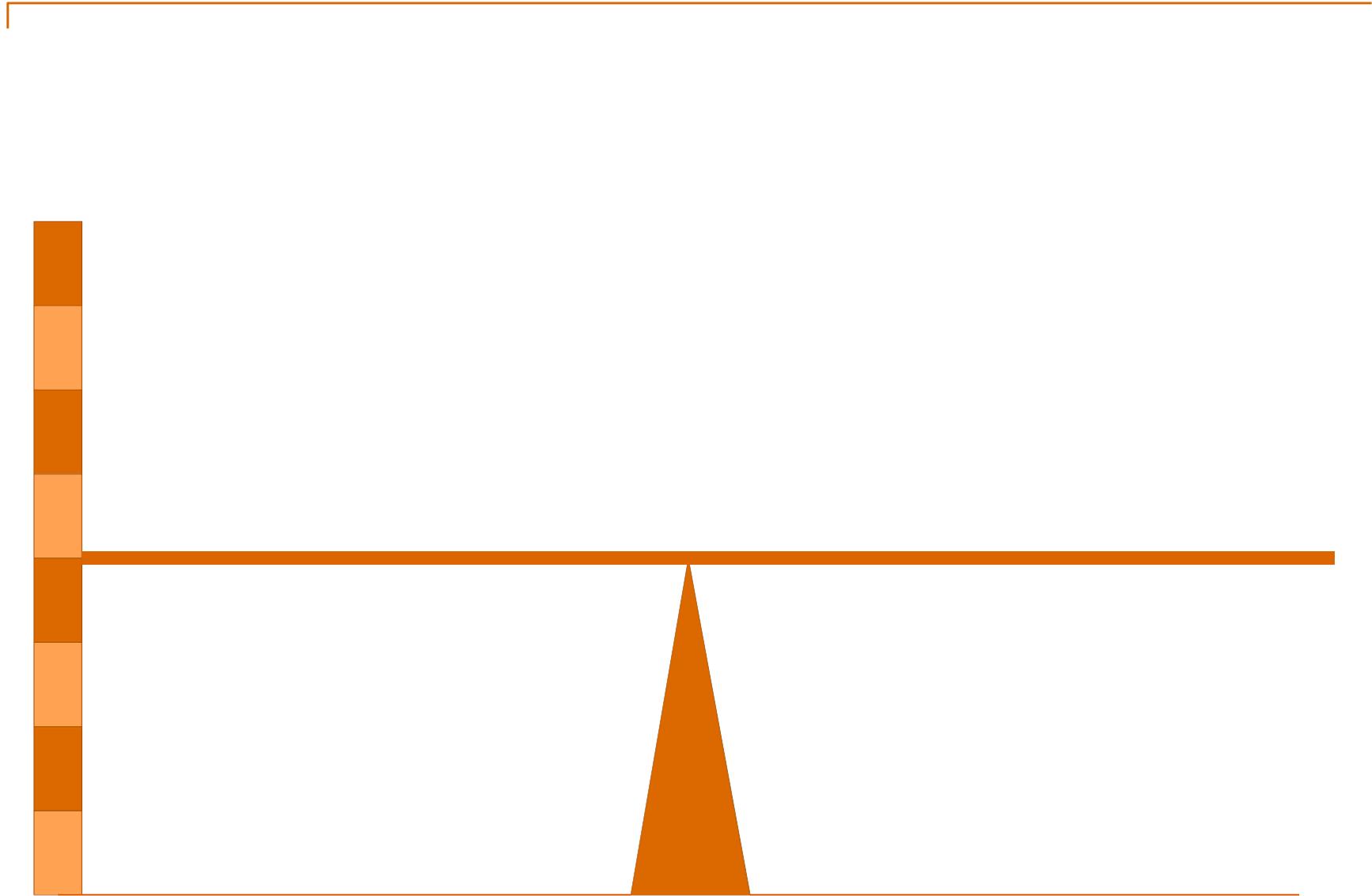


# *Share of world GDP of advanced economies*

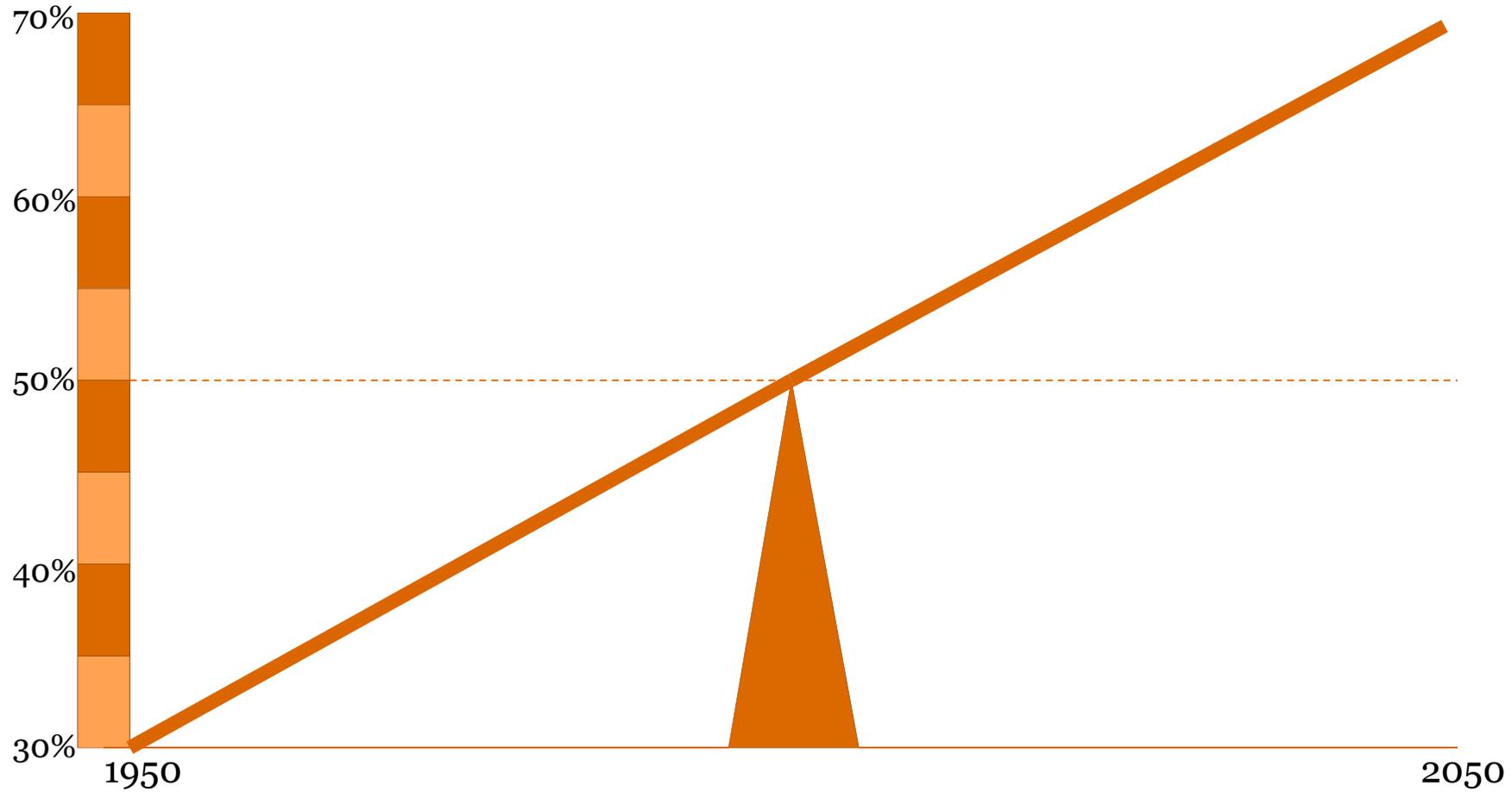


# *The growth of the middle class*

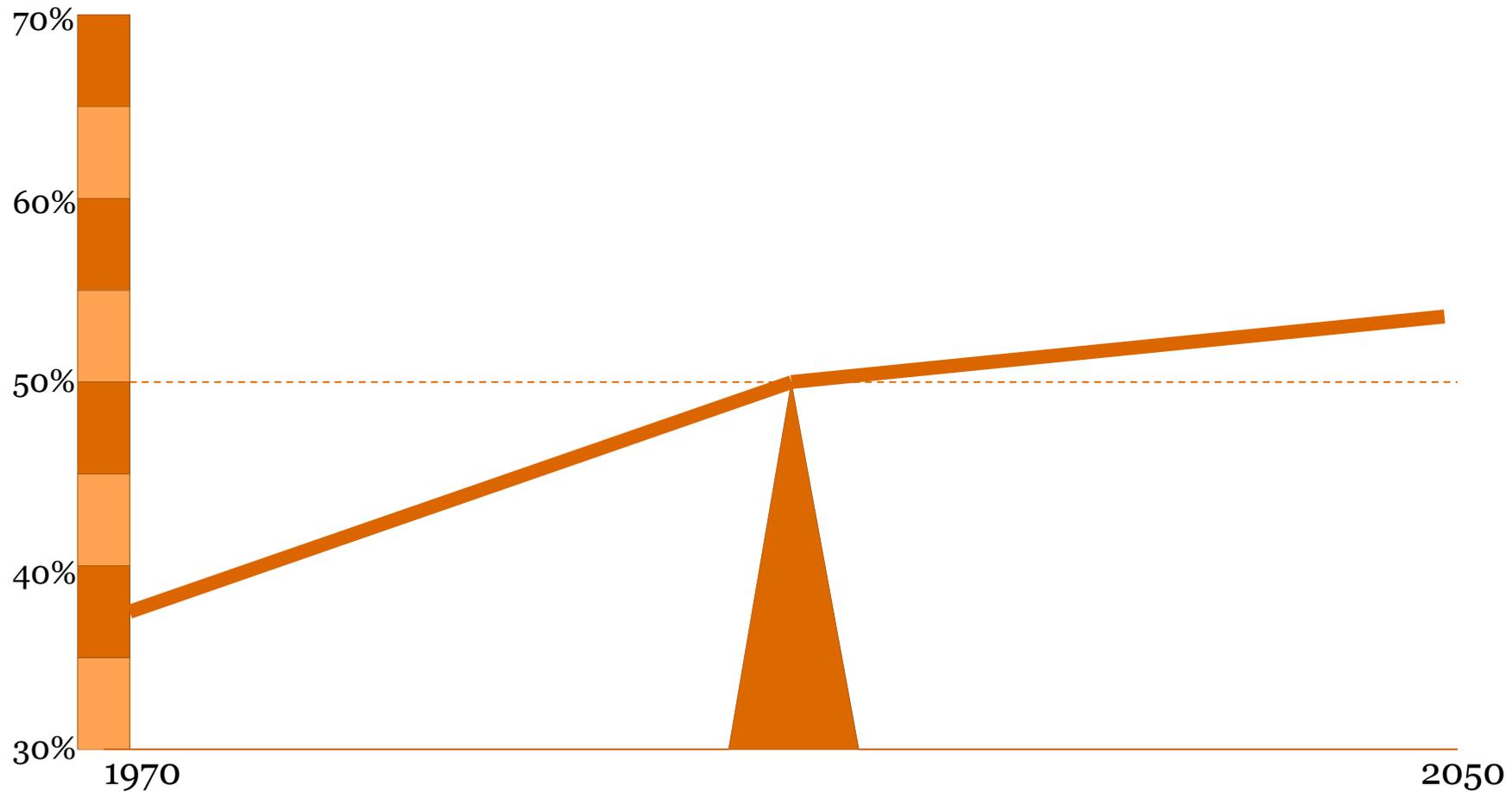




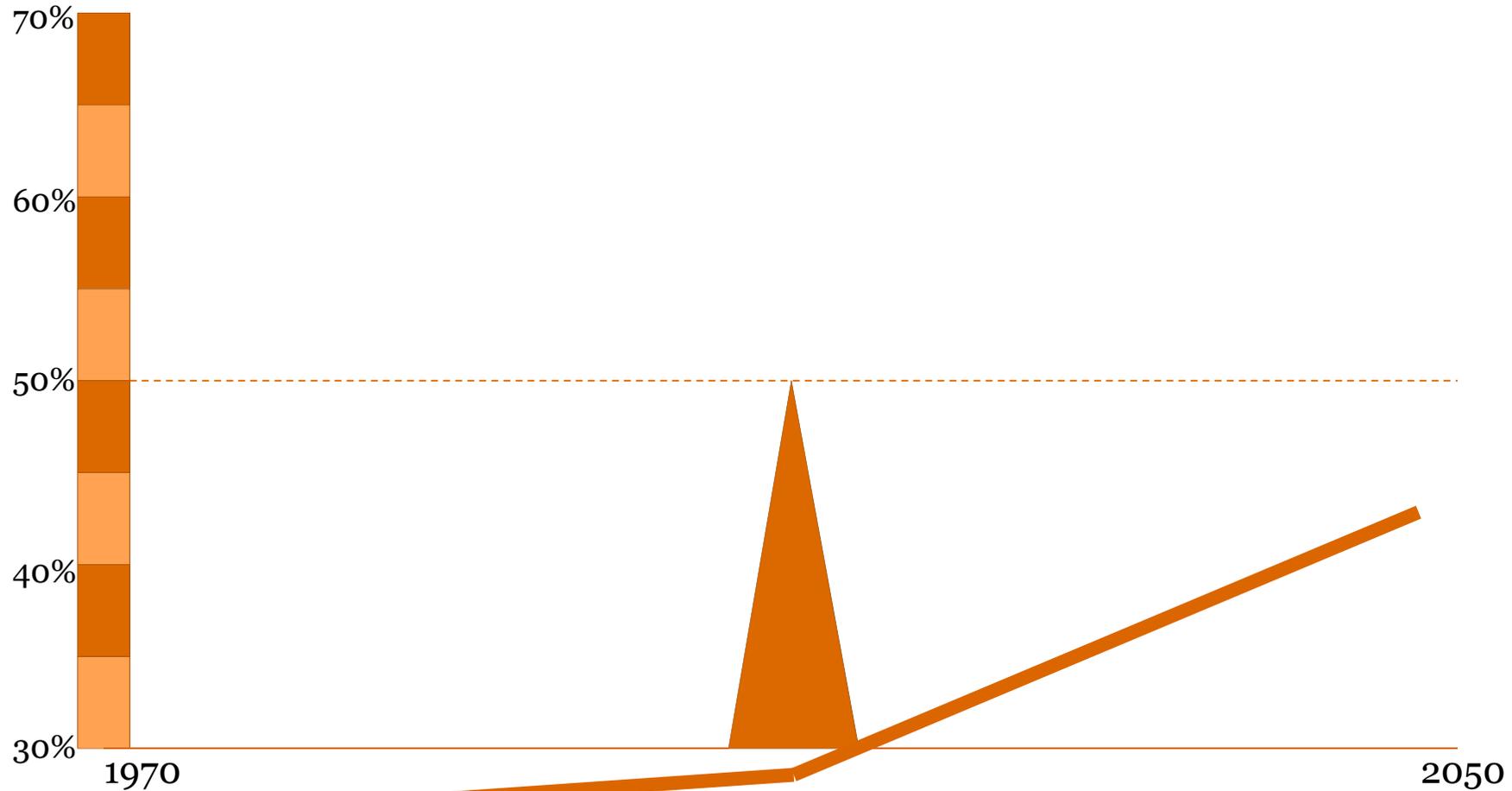
# *Proportion of world population in towns and cities*



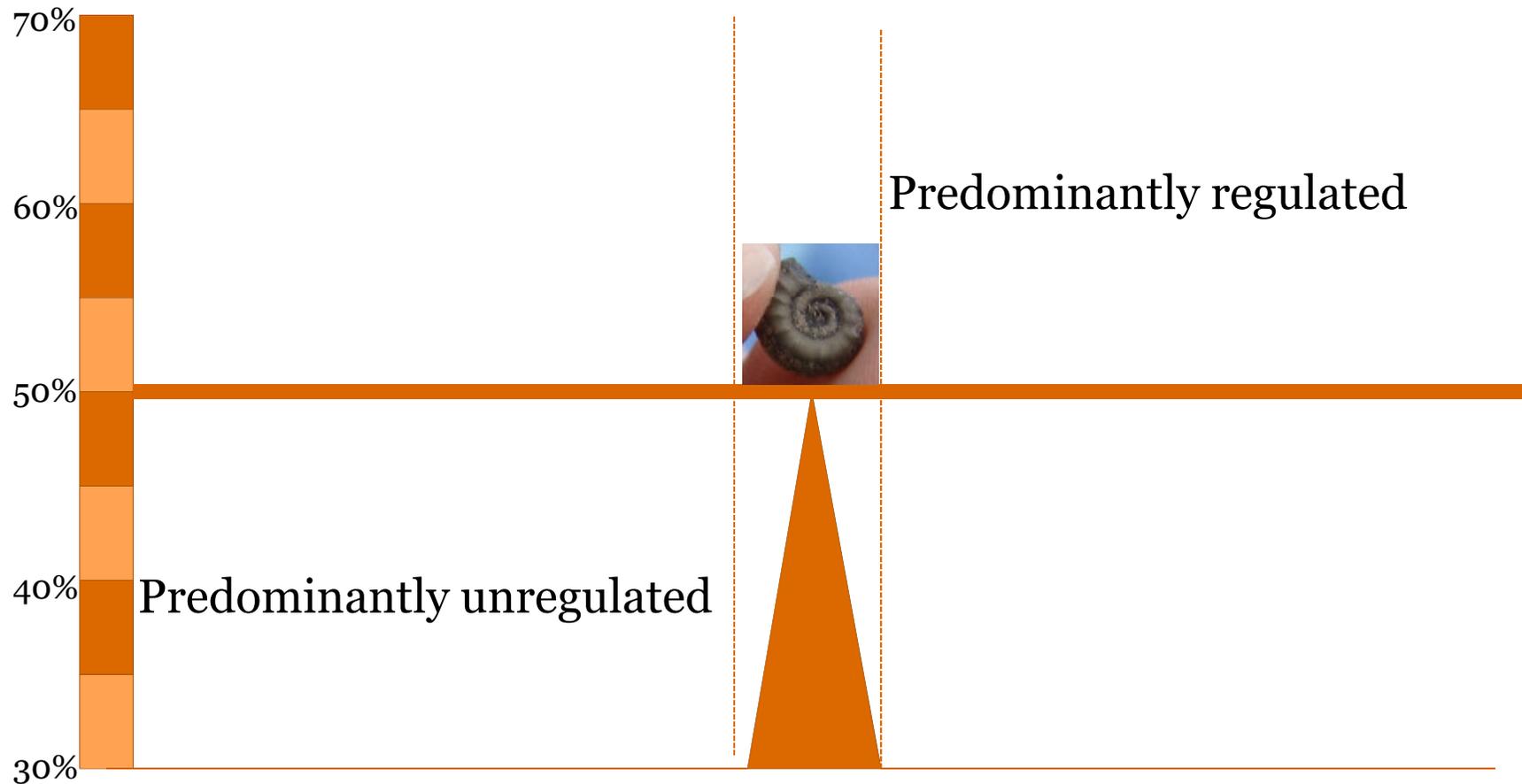
# *Proportion of population in developed countries over the age of 40*



# *Proportion of population in less developed countries over the age of 40*

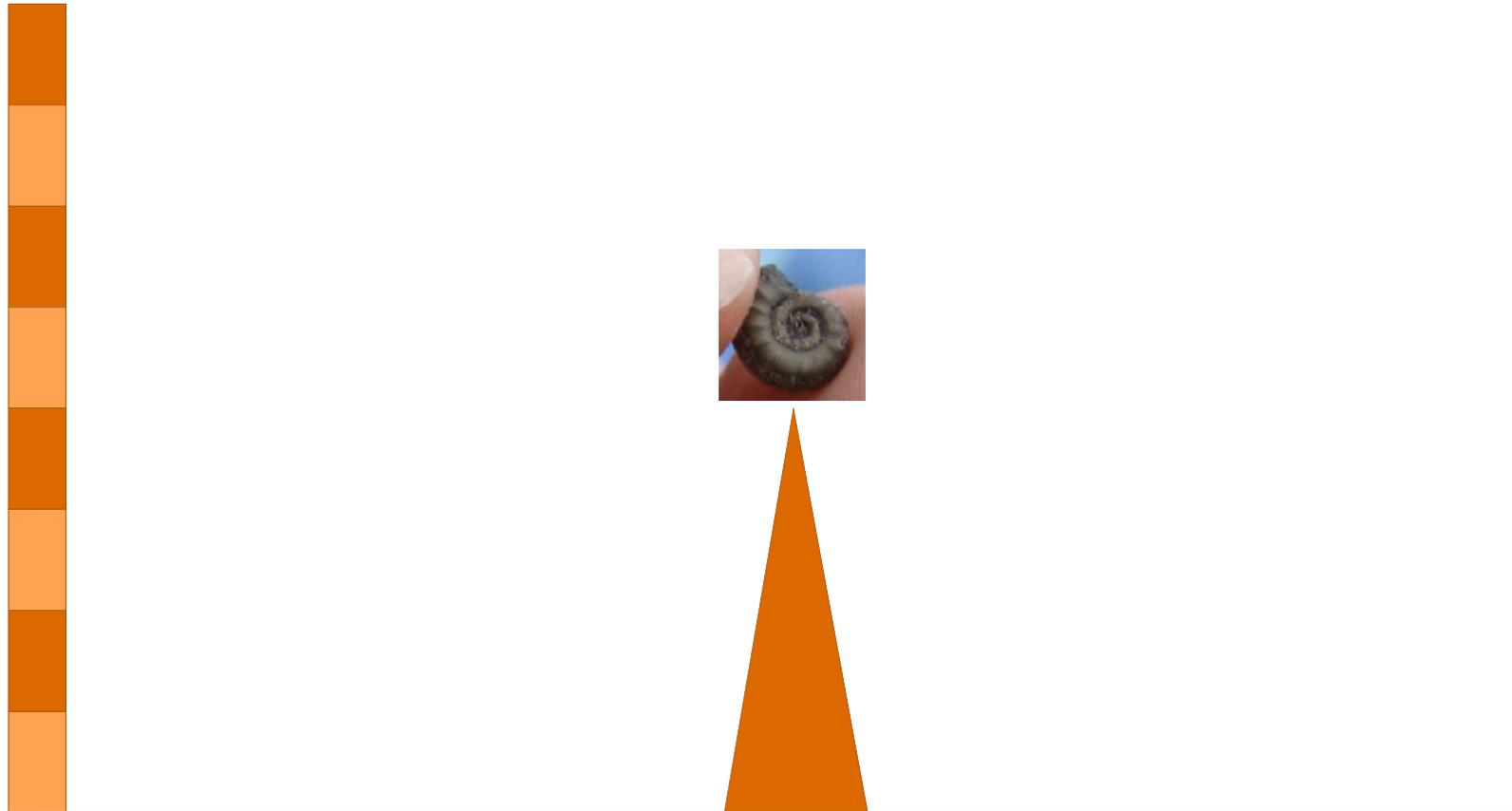


# *The impact of regulation on real estate investment management*

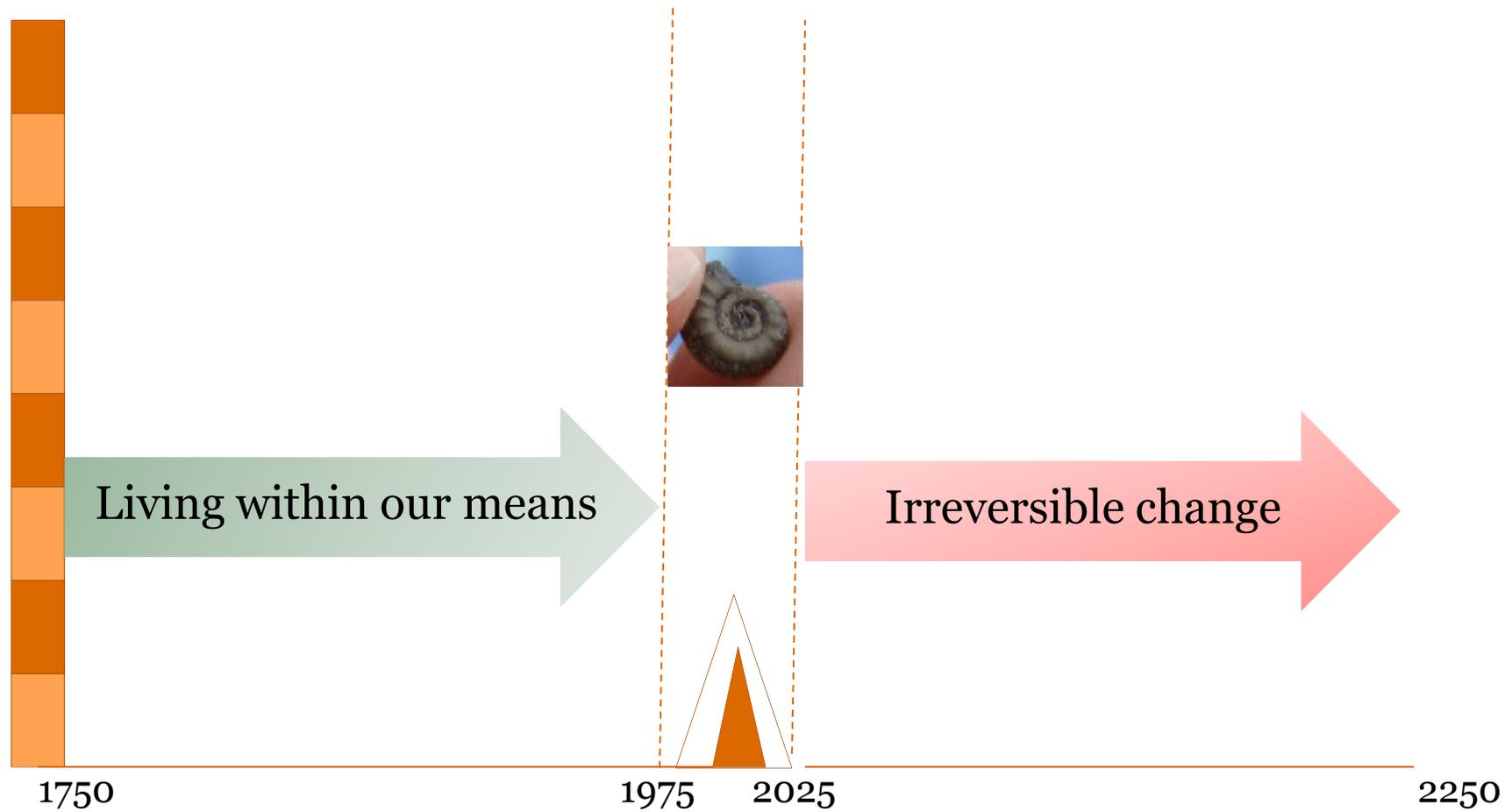


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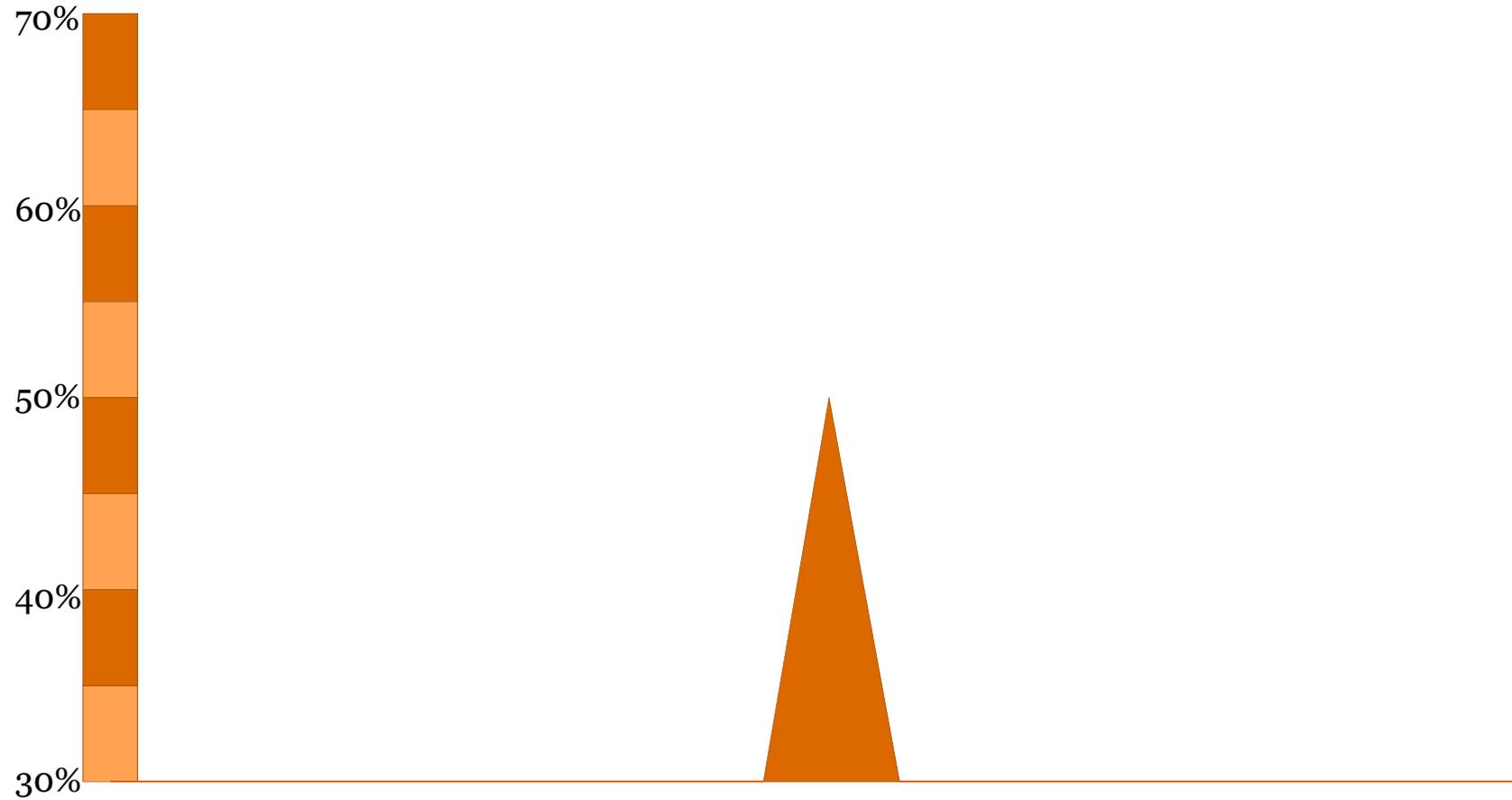
# *Sustainability*



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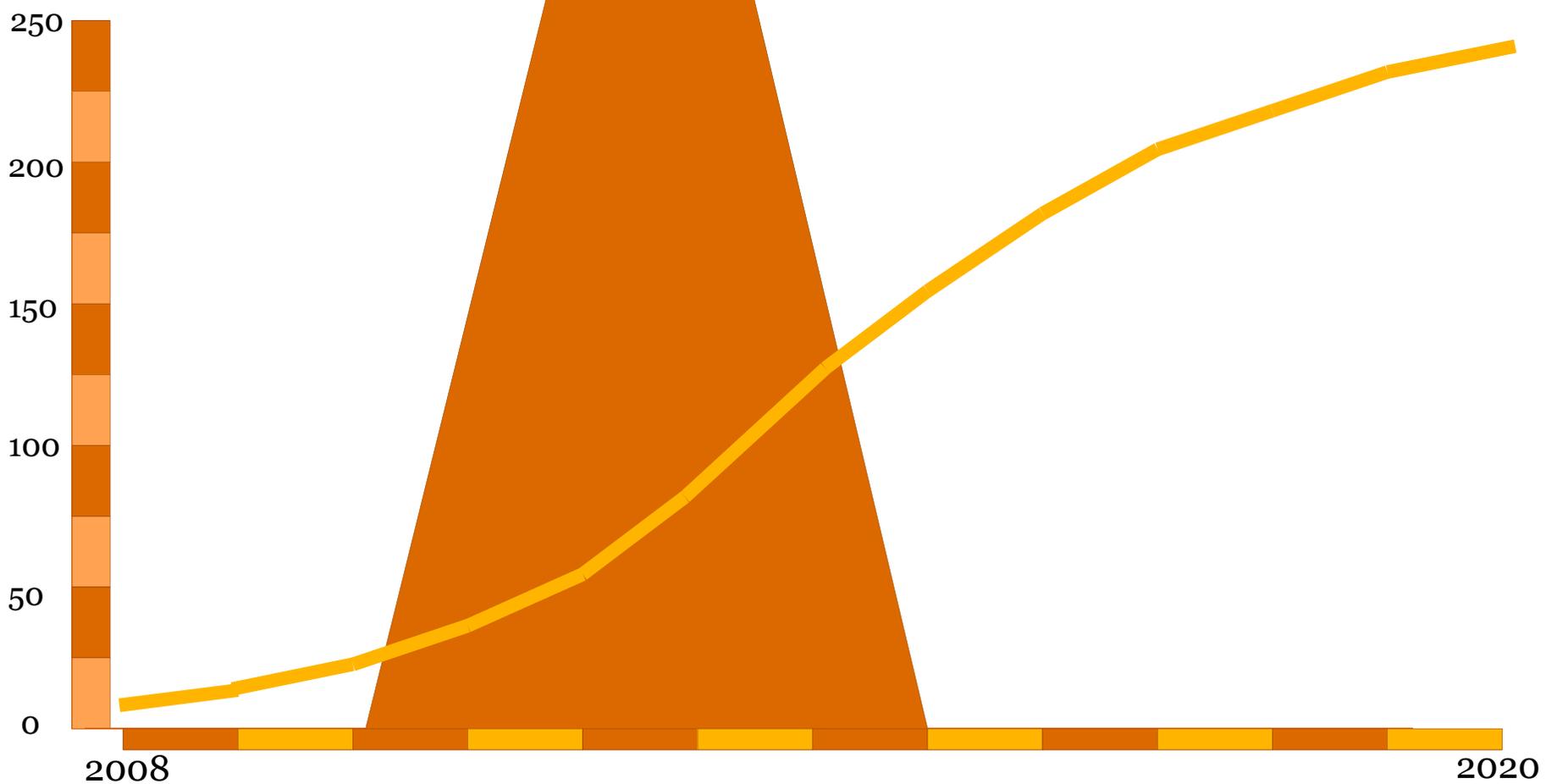


# Technology



# Technology

## Global cloud market size, US\$ billions



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## *What does this mean?*

*A young, urban  
middle-class in  
developing Asia will  
be the dominant  
source of investment  
opportunity and  
capital*

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A young, urban middle-class in developing Asia will be the dominant source of investment opportunity and capital

*Rapid growth and urbanisation will drive raw material demand creating huge challenges for the real estate industry but also adding to the pool of investment capital*

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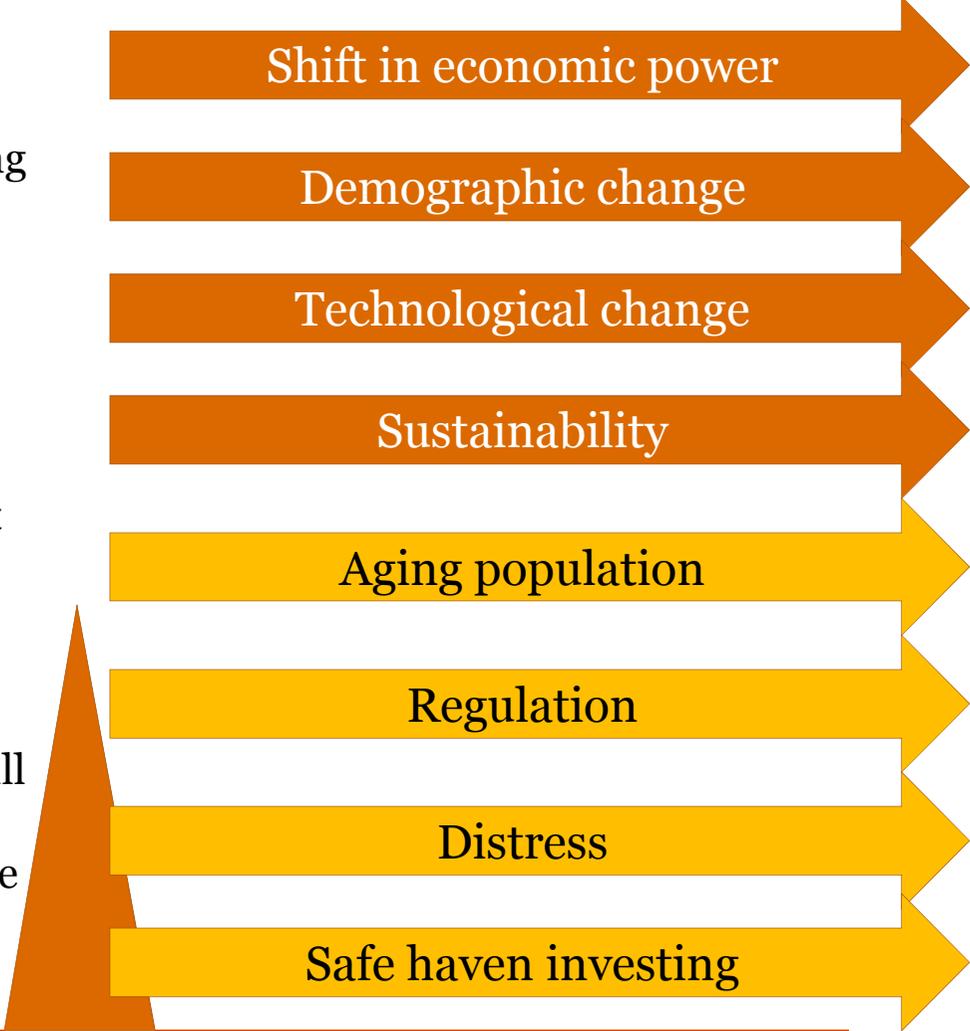
*Technological and behavioural change will render much existing building stock obsolete and require new stock to be more adaptable.*

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Shift in economic power

Demographic change

Technological change

Sustainability

Aging population

Regulation

Distress

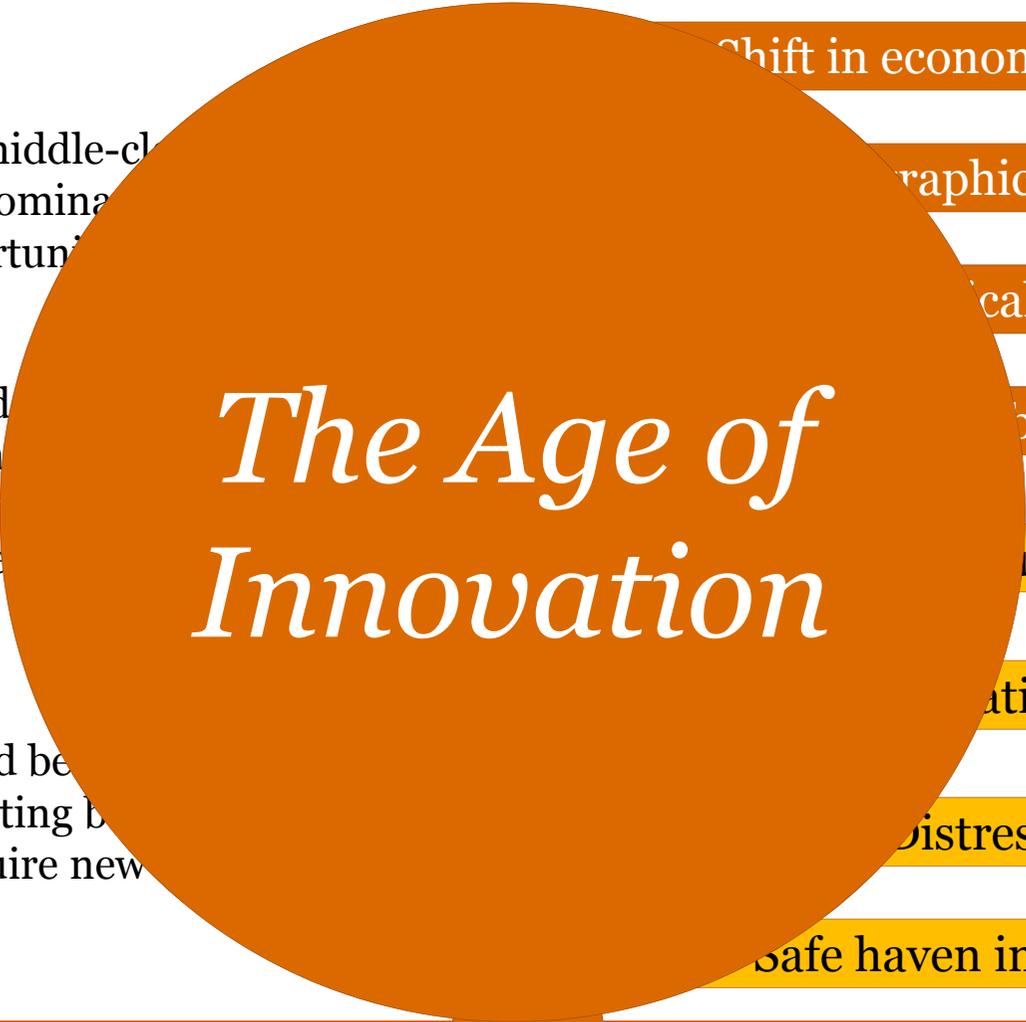
Safe haven investing

## *What does this mean?*

A young, urban middle-class  
Asia will be the dominant  
investment opportunity

Rapid growth and  
raw material demand  
challenges for the  
also adding to the  
capital

Technological and behavioral  
render much existing business  
obsolete and require new  
adaptable



Shift in economic power

Demographic change

Political change

Instability

Population

Urbanization

Distress

Safe haven investing

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# *Contact*

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# *Thank you!*

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