

Shaping the Housing Market for the Future

Consulting and analysis expertise for public and private clients



HOUSING MARKET



PUBLIC SERVICES



REAL ESTATE MARKET



CONSULTING & RESEARCH



DEMOGRAPHICS



TABLE OF CONTENTS	Page
Welcome	3
GEWOS	4
Housing market	6
Demographics	8
Public Services	10
Real Estate Market Analysis IMA®	12
Consulting & Research	14
Your contacts	15



Our mission at GEWOS is to develop tailor-made and sustainable decision bases for companies and public clients in the housing and real estate market. We support projects of all sizes – from housing market concepts and rent indexes for municipalities to location and market reports for investors and expert opinions for associations and politics.

GEWOS has been an independent company on the market for 50 years. Through our merger with the DSK | BIG Group, we can achieve real added value for our customers. The group consists of more than a dozen specialized companies at around 20 locations and has been active in urban, land and project development for more than 65 years. These experiences are incorporated into the work of GEWOS and guarantee well-founded and individualized results for clients.

Welcome to GEWOS

In view of the demographic challenges and the increasing concentration of demand on urban areas, housing market players are facing major challenges. In particular, a tense to competitive housing market requires coordinated efforts by all public and private players. New living space is therefore also of absolute necessity to cushion the rising costs for rental apartments and residential property.

On the following pages we would like to share with you the topics that motivate us here at GEWOS. Feedback is important to us. If you have any questions or suggestions, please contact us, we will take care of your concerns responsibly.

The Management Board

Daniel Hofmann

Carolin Wandzik

Jost de Jager



For the future viability of our society

More and especially affordable housing is one of the most urgent challenges of the present and a decisive factor in determining the quality of life of cities and municipalities in Germany. As an independent company, GEWOS has decades of consulting and analytical experience in the housing and real estate market.

The aim of our work is to advise public and private clients in the housing and real estate market on the basis of well-founded data analyses and forecasts. Our daily work focuses on developing municipal housing market concepts, forecasting the demand for new buildings, and advising political decision-makers.

Housing projects are complex and their implications in modern communities are far-reaching. In addition to the primary subject area of the housing market, we also apply our expertise to challenges arising from the demographic development of society and municipal public services.

The real estate market analysis IMA® is a renowned product that has been established on the market since 1982 and which we use to collect the actual real estate turnover and purchase prices on a small-scale level throughout Germany. This ensures a foundation based

on facts for assessing the opportunities and risks of the real estate market in Germany.

We are your partners in all matters concerning the improvement of social infrastructure in cities and communities. As experienced professionals, we assist you with our competencies when it comes to making forward-looking decisions. We not only collect the facts based on proven methodological competence but also support you in the interpretation of complex data with a team of consultants and analysis specialists operating flexibly on the market.

Our customers are on the one hand local authorities, federal states and federal institutions, and on the other hand clients from the private sector – building associations, housing companies, builders and project developers in the real estate sector.

We regard our work as a privilege, because we make a daily contribution to a more sustainable society. With a professionally trained and committed team, we act implementation-oriented and support clients from politics, administration and economy from a single source with all topics of the housing market.

Sustainable housing planning

Creating and maintaining appropriate living space for all target groups is one of the most important social issues. Cities, municipalities, regions and districts are therefore dependent on instruments with which they can recognize the consequences of demographic change and variations in economic structures for the housing market at an early stage.

In order to operate successfully on the market, project developers and investors base their decisions on location and market analyses as well as feasibility studies for residential construction projects. For the housing industry the success of rentals, the sustainable development of their holdings and the satisfaction of tenants are usually in the foreground. We at GEWOS

support the players in the housing market with forecasts and concepts as well as competent advice. We take an individual approach to you and the challenges you face – this way you can secure the supply of housing, make use of subsidies and have a basis for political decisions as well as for medium- and long-term planning.

We work closely with local players to effectively meet identified needs and ensure the long-term attractiveness of the location. Together we develop strategies to adapt the housing supply to the changed requirements.

- Housing market analyses, forecasts and concepts
- Rental indexes and costs of accommodation
- Location and market reports
- Consulting for the housing industry

“The interests of the players on the housing market are diverse. Municipalities and the housing industry benefit from our extensive know-how: Housing supply concepts, rental indexes, feasibility studies, analyses of space potential, support of participatory processes – all from a single source!”

Carolin Wandzik

+49 40 69712 - 233

carolin.wandzik@gewos.de



Meeting people's needs

The effects of demographic change are fundamental for all players in the housing market: retirees, the very elderly and those in need of care are increasing, while at the same time the number of working people and families is falling. Municipalities, districts, institutions and companies are confronted with differentiated changes locally. Declining and rising populations are developing in parallel and are interdependent. We are at your side when it comes to identifying local demographic change processes and positioning yourself strategically accordingly.

We support local authorities and housing companies in these demanding challenges – also in the area of age-appropriate living.

Because the increase in the older population is predetermined by demographic change, investments must be made in new buildings that are age-appropriate and well embedded in their local environment. Increasingly, the place of residence and the living environment also influence the personal well-being.

GEWOS works with analysis and forecasting tools that have been tried and tested many times and are constantly being further developed methodologically, thereby generating a basis for your decisions for future strategic planning. In addition to demographic analyses, population and household forecasts, we also provide need assessments for nurseries, schools and nursing facilities.

- Population and social structure analyses
- Population projections
- Demographic surveys

“In order to meet the challenges of the housing market, concepts are necessary that take both political and social factors into account. You can rely on our five decades of experience in demographic analysis, population and budget forecasting and needs assessment – especially for education and care facilities.”

Jost de Jager
+49 40 69712-250
jost.dejager@gewos.de

Responding to changing infrastructure needs

The effects of demographic change are causing regions and communities with shrinking and growing populations to coexist in many places. This requires different local strategies for the sustainable adaptation of the infrastructure regarding public services. Changes in demand in terms of quality overlap these quantitative developments and result in changes in demand. Mobility offers, medical care, leisure facilities, schools and childcare facilities are particularly affected by these causes.

Solid empirical data and reliable demand estimates are essential for a sustainable and resource-efficient orientation of the infrastructure supply. The cooperation between GEWOS, the public sector, welfare

associations and churches has proven itself in identifying challenges at an early stage. With well-founded analyses of trends and forecasts for future development, we create for you a starting point for a strategic adjustment of the infrastructure offers in your region.

Based on our extensive experience in participation processes, we strive for a consensus between different target groups in which we integrate the content of administration, politics, stakeholders and citizens. We support you with implementable concepts that represent a roadmap into the future at the municipal or regional level.

- Demand forecasts
(daycare centers, schools, medical care, etc.)
- Moderation of strategy processes
- Future concepts
- Public services

“GEWOS facilitates your work with population, supply, accessibility and needs analyses, for example for schools, daycare centers, medical care and nursing. We develop future concepts for public services, plan and implement citizen participation and advise you strategically.”

Carolin Wandzik
+49 40 69712 - 233
carolin.wandzik@gewos.de

Customer-oriented evaluation of industry data

The housing and real estate market in Germany is characterized by sustained dynamics – one of the central challenges for the federal government, the federal states, local authorities and the economy. Since 1969 we have maintained an intensive exchange with decision-makers and experts and have adapted our methods to changing conditions. We refine proven procedures, but at the same time create new instruments in order to provide clients with reliable data according to the latest findings at all times.

Through the use of the real estate market analysis IMA®, we have been determining actual real estate turnover and purchase prices throughout Germany

for more than 35 years. Customers have access to a unique, localizable and standardized data pool. Based on the IMA® data, GEWOS regularly publishes the real estate index DEIX, which reflects the actual price development for owner-occupied homes and condominiums in western and eastern Germany over the long term. Due to the comprehensive data basis and the high degree of differentiation of the available market data, IMA® is also ideally suited for the development of special analyses.

Our know-how is adapted to the dynamics of the markets: That is why we work on projects in interdisciplinary teams that are tailored to the assignment. Our analyses and recommendations draw on the expertise of geographers, urban and regional planners, economists and sociologists. This enables us to include all influencing factors of the market equally in our evaluation.

“Our real estate market analysis is an accurate and differentiated instrument for assessing the opportunities and risks of real estate investments, identifying market potential and for sound sales management. This makes IMA® the only comprehensive analysis of the transaction activity of residential and commercial real estate in Germany.”

Daniel Hofmann

+49 30 278749-11
daniel.hofmann@gewos.de



Understanding market developments in context

At a time when data can be generated and made available more quickly and extensively than ever before, its interpretation and communication are of decisive importance. Consequently, GEWOS has always been more than a pure analysis institute – consulting and research are the focus of our work. As an independent consulting specialist, we have been analyzing developments in the housing and real estate market as well as urban development for almost five decades now.

One of our core competencies is the analysis of regional and nationwide data and statistics. We supplement this market analysis with the differentiated recording of transactions in the residential real estate sector. On this basis, we regularly publish our own purchase price index in the “Immobilien Zeitung”, one of the leading trade magazines for the real estate industry in Germany.

Municipalities and investors need dependable, precisely interpretable data to make reliable decisions for society. We create individual market observation instruments adapted to the special requirements of our customers. In addition, we invest continually in our own research in order to recognize market trends at an early stage.

Your contacts



Daniel Hofmann

IMA®, housing industry, location and market reports

“Thanks to real estate market analysis, we have a unique, location-based and standardized data pool. The IMA® is a first-class analytical tool for assessing the opportunities and risks of real estate investments and enables us to forecast potential in the German real estate market on a small-scale and nationwide basis.”

+49 30 278749 - 11
daniel.hofmann@gewos.de



Carolin Wandzik

Housing market, public services and participation procedures

“Cities and municipalities make infrastructural decisions of enormous importance for the common good. Reliable analyses and demand assessments are essential for a sustainable and resource-efficient orientation of the product range. We advise you with housing market, location and market analyses – always state-of-the-art professionally.”

+49 40 69712 - 233
carolin.wandzik@gewos.de



Jost de Jager

Demographics, research and consulting

“For decades, clients from politics, administration and business have relied on our profound analyses, forecasts and concepts for the housing market. This enables us to provide the best possible independent expertise in a field that is essential for the future viability of society.”

+49 40 69712 - 250
jost.dejager@gewos.de



Hamburg Offices

Drehbahn 7
20354 Hamburg

T +49 40 69712-0
F +49 40 69712-220
info@gewos.de

Berlin Offices

Axel-Springer-Straße 54 A
10117 Berlin

T +49 30 278749-0
F +49 30 278749-20
info@gewos.de

GEWOS Institut für Stadt-, Regional- und Wohnforschung GmbH
Drehbahn 7 | 20354 Hamburg
Executive Board: Jost de Jager, Daniel Hofmann, Carolin Wandzik
Local Court Hamburg | Commercial Register: HRB 12536