



# Real Estate Market Sentiment in Egypt

Future Outlook from Consumers and Real Estate Investors

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**YouGov**<sup>®</sup>



# YOUNGOV BY NUMBERS

**2000** YOUNGOV FOUNDED IN THE UK

**11**

NUMBER OF YEARS OPERATING IN MENA

**5**

NUMBER OF OFFICES IN MENA

**5 MILLION**

NUMBER OF PEOPLE ON YOUNGOV RESEARCH PANELS GLOBALLY

**21**

NUMBER OF COUNTRIES IN WHICH OUR MENA PANEL OPERATES

**95**

THE SIZE OF OUR RESEARCH TEAM IN MENA

**728,500**

NUMBER OF PEOPLE ON YOUNGOV'S RESEARCH PANEL IN MENA, INDIA AND PAKISTAN

YouGov



# A study of real estate market sentiment in Egypt.





## Who did we speak to?

**105**

Real Estate  
Investors

**312**

Consumers

\*All respondents currently own a property or are willing to buy a property in the next year.

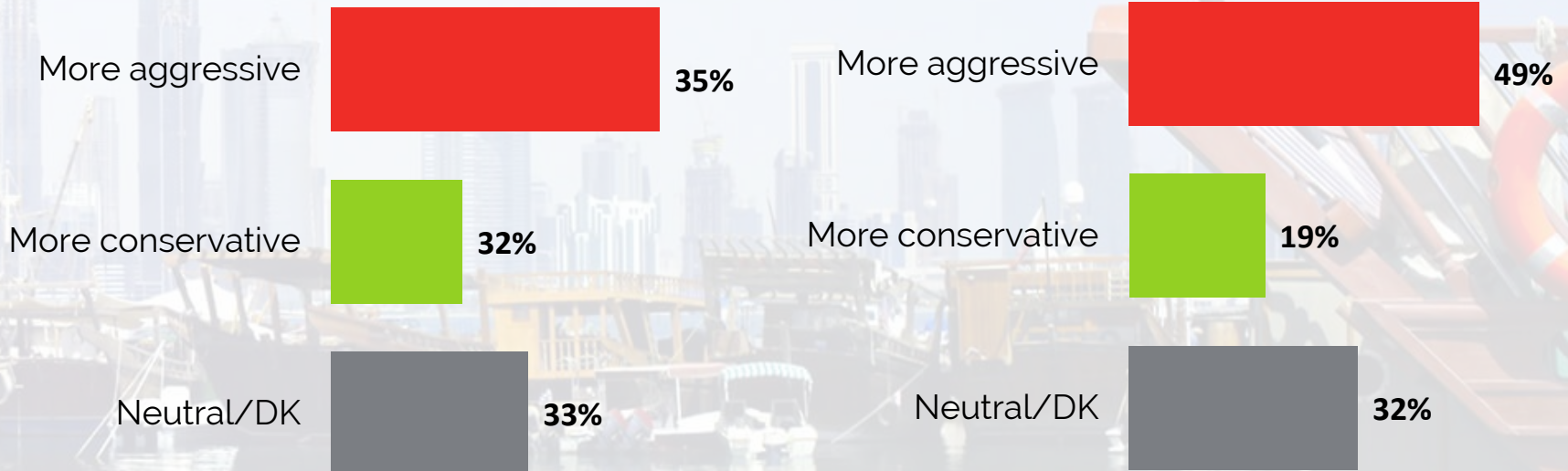


# Investment outlook is positive as more aim for an aggressive strategy with high risk & high returns in the next 12 months

## Change in Investment Strategy

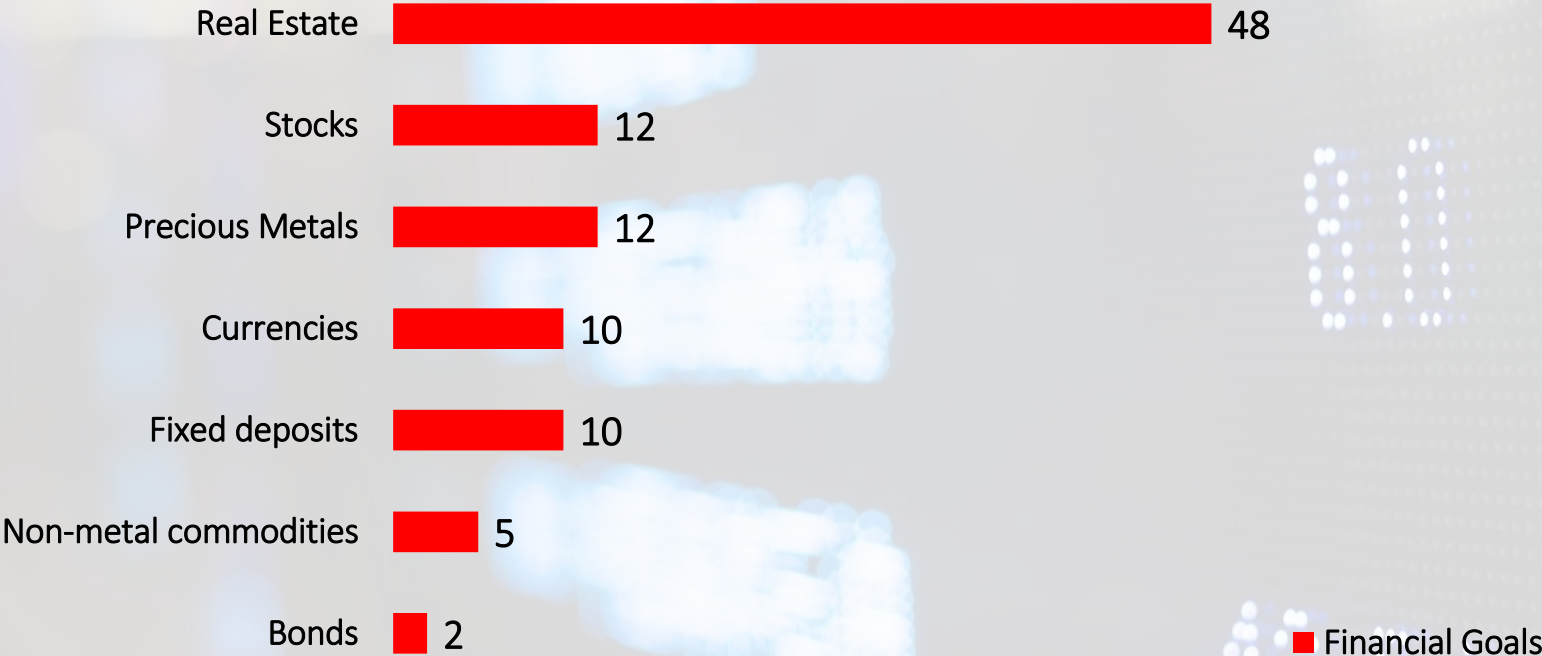
In the past 12 months

In the next 12 months

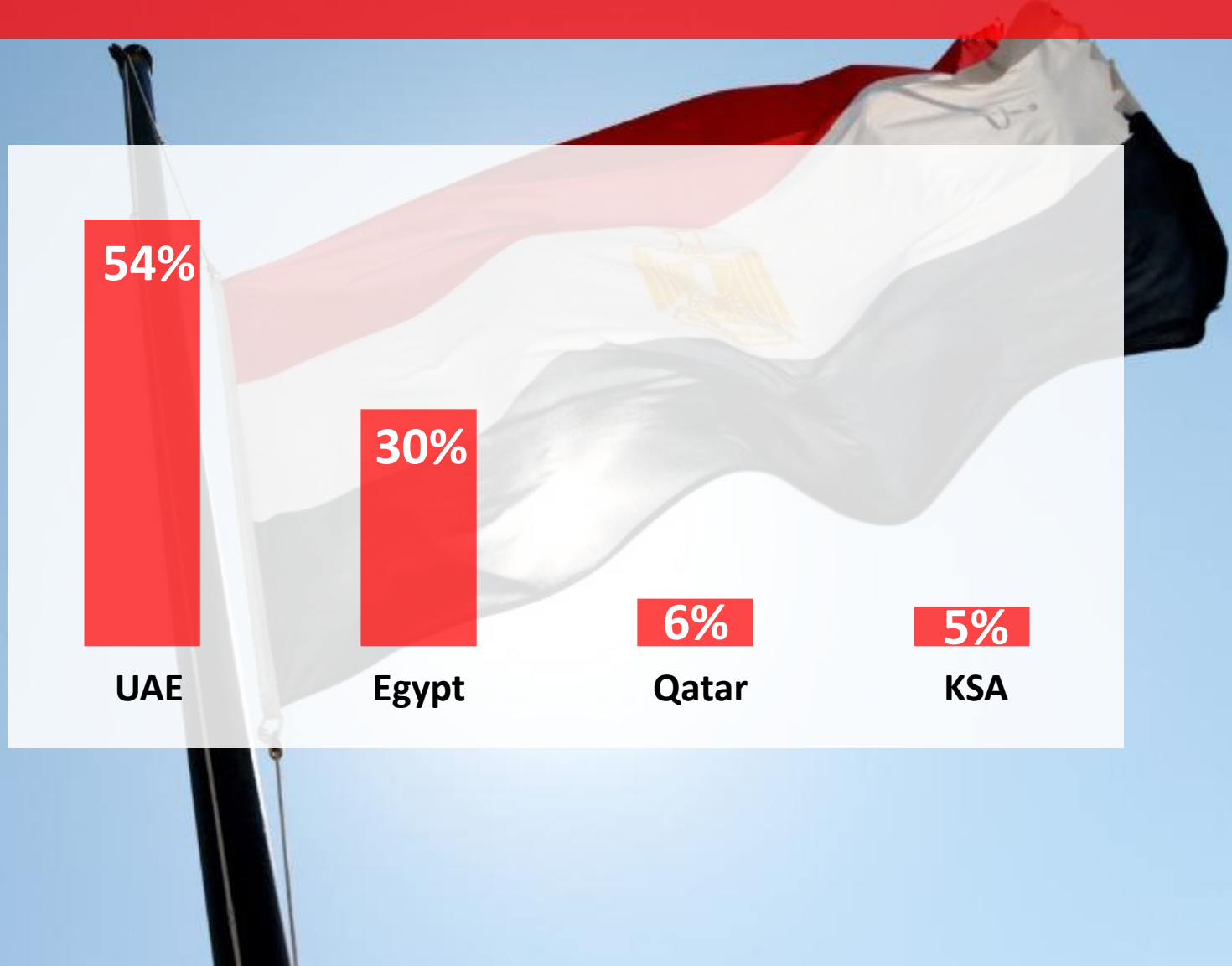


# Real Estate is considered a promising asset class in future portfolio mix

Future portfolio mix



Egypt is the second most appealing country for real estate investments in the Middle East.



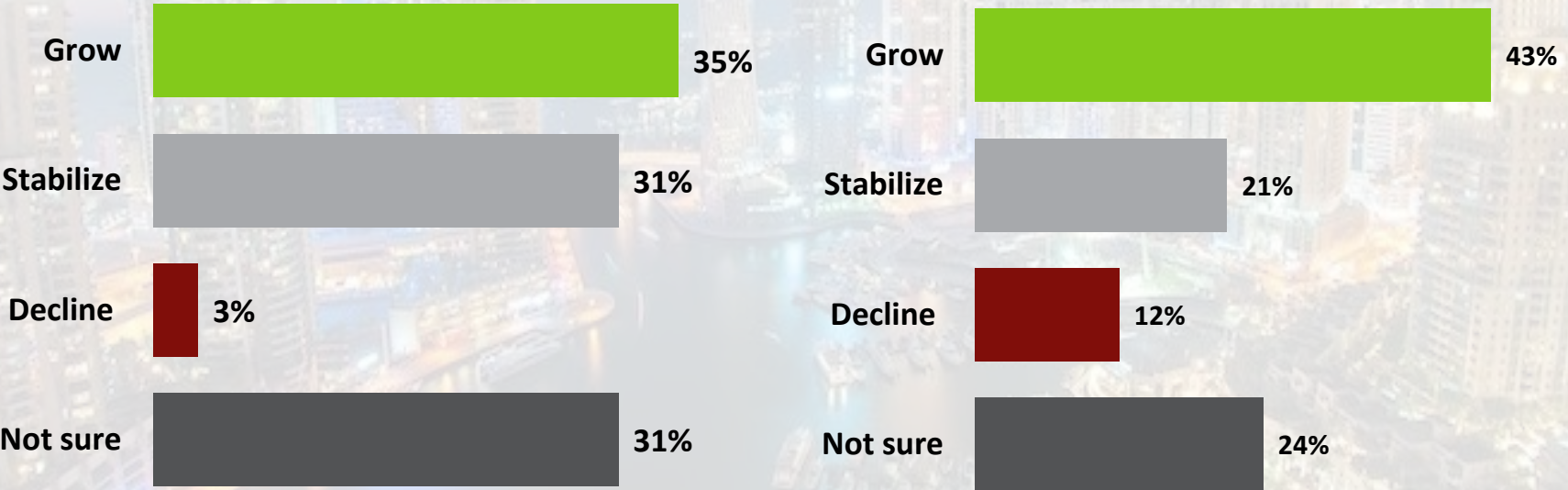


# Overall, sentiment is positive for Egypt real estate market

How do you expect the real estate to perform in the next 12 months?

In the Middle East

In Egypt

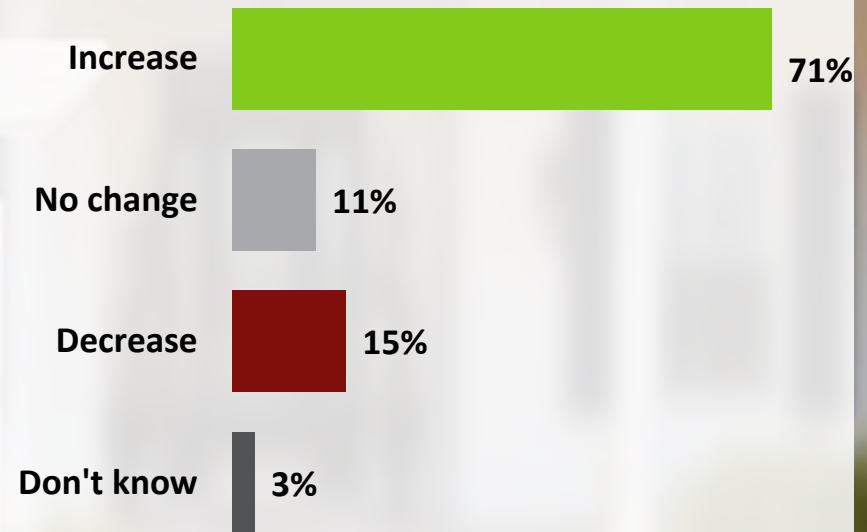
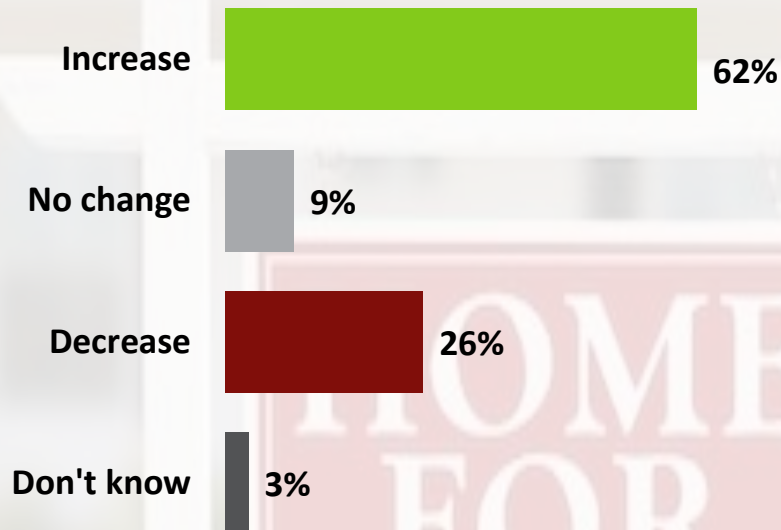




A moderate increase in sales and rental prices of residential properties is expected in the year to come.

### Sale price

### Rental price

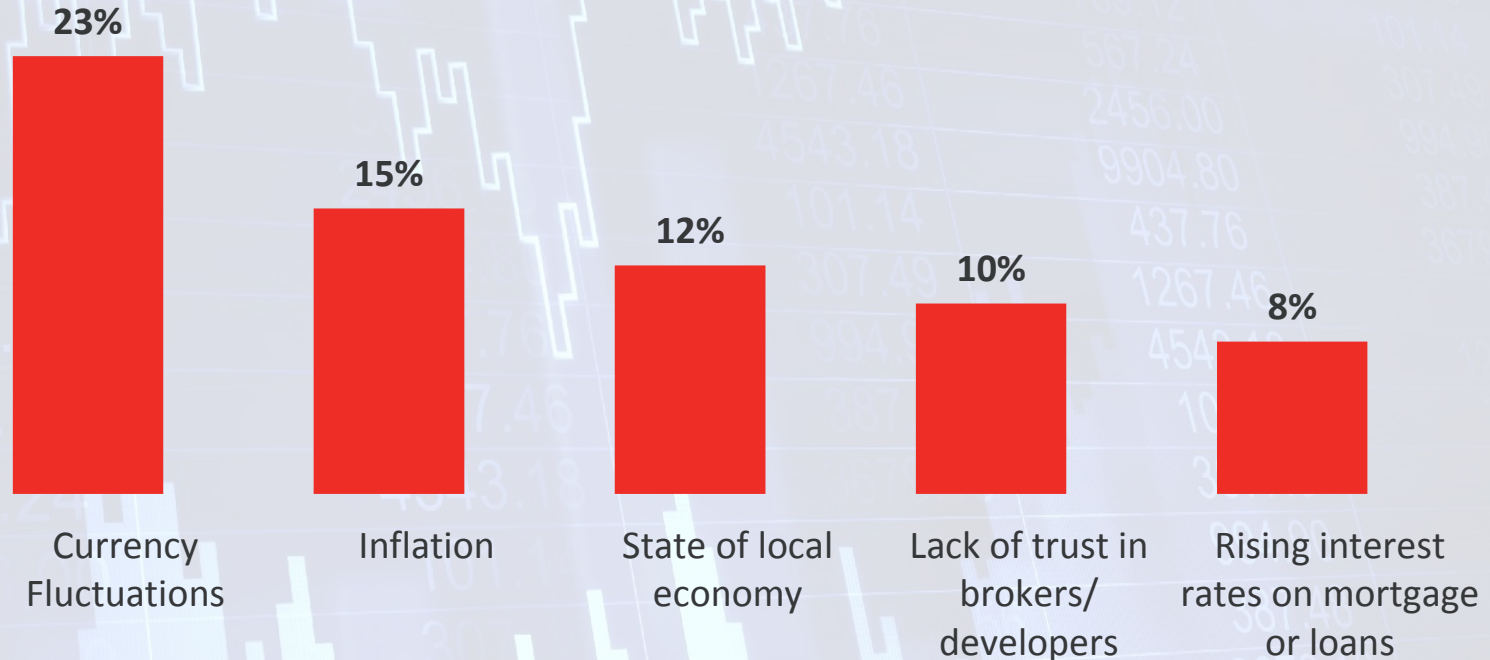


Average expected increase: 6.1%

Average expected increase: 8.58%

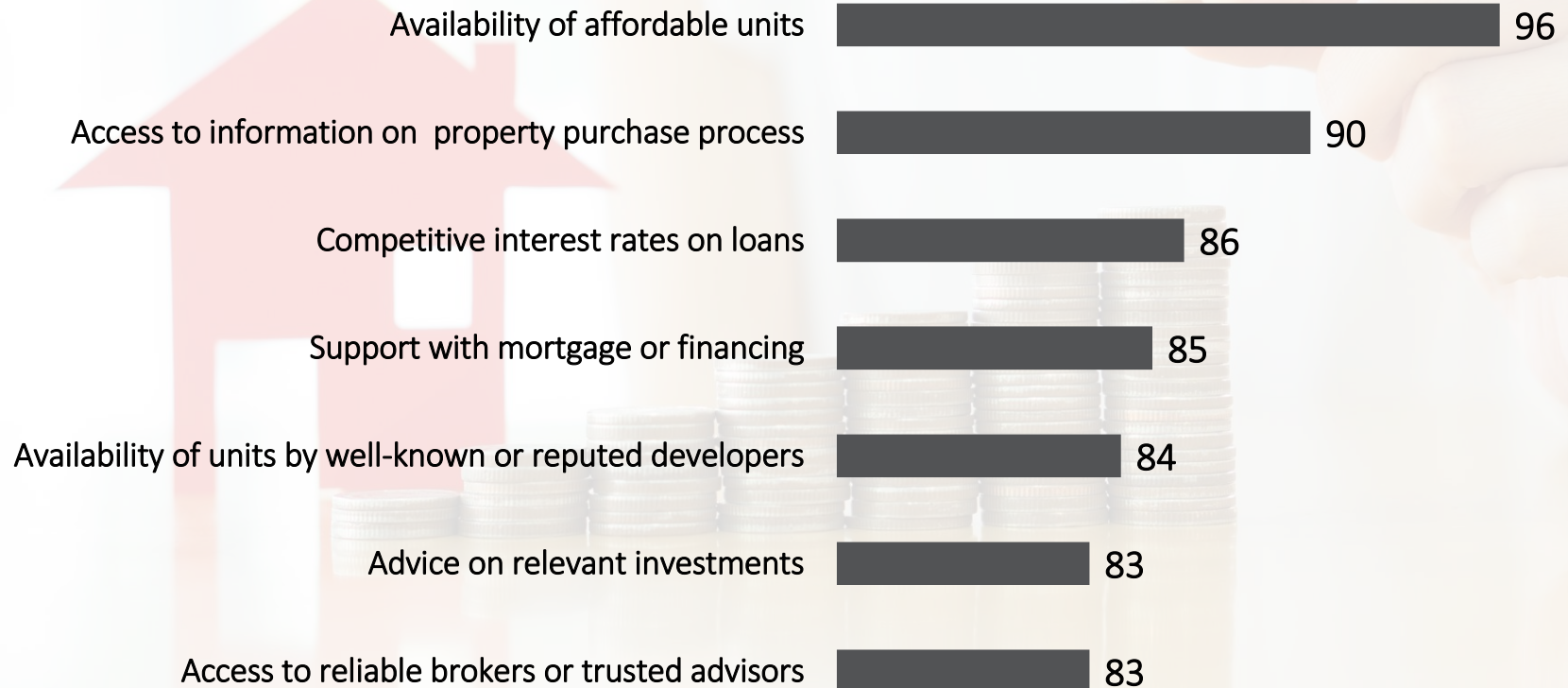
# Macro-economic factors remain as elements of concern when investing in real estate.

## Top concerns whilst investing in Real Estate





Affordable units & access to information are the most important factors encouraging consumers to invest in Egypt real estate market.



Being in close proximity to healthcare & educational facilities are high on the agenda.

**47%**

Healthcare facilities

**45%**

Educational facilities

**37%**

Place of work/  
business

**33%**

Public transport  
(bus)



Residential properties in the city center/  
Downtown are the most sought-after.

**30%**

Stand alone residential  
properties in downtown/  
city center

**28%**

Gated communities in  
the city that host  
commercial and retail  
spaces

**27%**

Gated communities in the  
suburb that host  
commercial and retail  
spaces

Large apartments (3+ bedroom) are the most preferred type of property.

57%

3+ bedroom  
apartment

19%

2 bedroom  
apartment



Affordable housing is the biggest gap in the real estate industry.

**54%**

More affordable housing

**33%**

Lack of access to reliable brokers

**33%**

Availability of smart or energy efficient properties

**30%**

Access to data comparing properties

**24%**

Competitive interest rates on loans

**YouGov**

# Egyptian Real Estate in the past year According to **YouGov** BrandIndex





# YouGov BrandIndex coverage in Egypt

1

CONTINUOUS

365 24/7

DAILY COVERAGE

4

PANELIST  
PROFILING

DEMOGRAPHIC &  
BEHAVIORS

2

LARGE SAMPLE SIZE

325

EACH DAY

5

CUSTOM TRIGGER  
QUESTIONS

... CAN BE INSERTED  
INTO SYNDICATED  
QUESTIONNAIRE

3

BREADTH OF COVERAGE

283

BRANDS

6

HISTORICAL  
DATA

NEARLY 8 YEARS  
ON MOST BRANDS

7

GLOBAL PLATFORM

COMMON METHODOLOGY, DELIVERY  
VIA ONLINE REPORTING TOOL

YouGov

# How YouGov BrandIndex works:

*From our Panel, to your dashboard*

## YouGov Panelists



## BrandIndex Survey

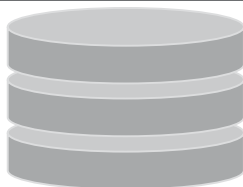
How which of the following have you heard something **NEGATIVE** about over the **PAST TWO WEEKS**?

Please choose as many brands as you like. Click to select and click again to deselect.

Walmart	Bank	Target	Walt Disney	Procter
Bank	Procter	Walt Disney	Walmart	Bank
Bank	Target	Walt Disney	Walmart	Bank
Bank	Walmart	Bank	Walt Disney	Procter
Walmart	Bank	Target	Walt Disney	Procter



## YouGov Database



## Online Reporting Tool



## Easily Exportable Data

Region Sector Filter Brand	US					
	Internet Sites					
	Gender: Female, Income: \$100K+					
	Google					
	Standard	Proportional	Positive	Negative	Neutral	Total
05-01-2009	65.4	80.2	120	13	30	164
05-04-2009	67.2	81.2	127	13	29	170
05-05-2009	68.2	81.6	131	13	28	172
05-06-2009	67.0	81.2	128	13	30	171
05-07-2009	69.7	81.9	129	13	25	167
05-08-2009	68.5	81.4	126	13	26	165
05-11-2009	69.0	81.6	127	13	25	165
05-12-2009	70.1	81.5	130	13	24	167
05-13-2009	72.3	83.8	139	12	24	175
05-14-2009	78.7	92.2	145	6	26	176
05-15-2009	78.3	92.4	140	5	26	172



# The Metrics in YouGov BrandIndex

*A comprehensive daily picture of brand perception and performance*

## Media Metrics

### **Buzz:**

*Have you heard anything positive or negative about the brand in the last two weeks?*

### **Aided Brand Awareness:**

*Which brands are you familiar with?*

### **Advertising Awareness:**

*Have you seen recent advertising?*

### **Word of Mouth (WOM) Exposure**

*Have you recently spoken about the brand?*

## Brand Health Metrics

### **General Impression:**

*What is your positive or negative impression of the brand?*

### **Quality:**

*Is the brand of good or poor quality, irrespective of price?*

### **Value:**

*Do you believe the brand to offer good or poor value for money?*

### **Corporate Reputation:**

*Would you be proud or embarrassed to work for this brand?*

## Lower Funnel Metrics

### **Purchase Consideration & Intent:**

*Which brands are you considering purchasing? Which most likely?*

### **Customer Status:**

*Are you a current or former customer?*

### **Satisfaction:**

*Are you a recently satisfied or dissatisfied customer of the brand?*

### **Recommend:**

*Would you recommend this brand to a friend or tell them to avoid it?*

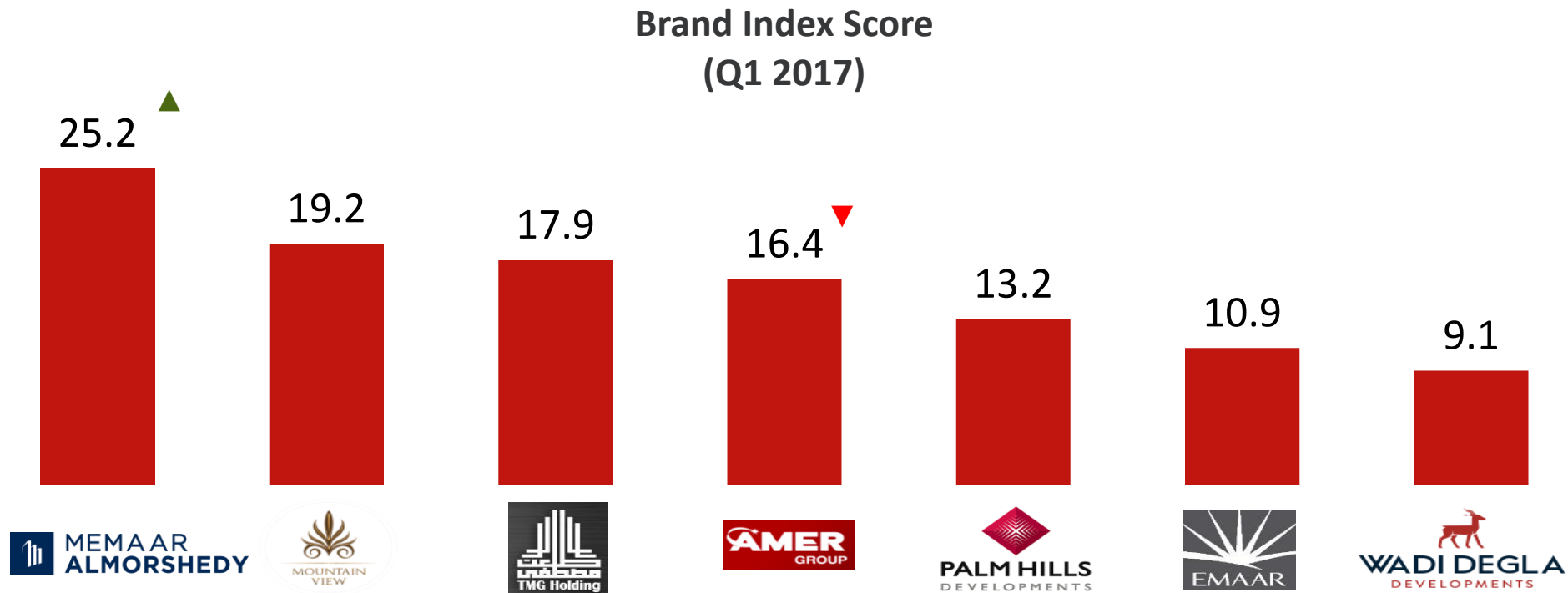
## Attention

*Sum of positive/negative Buzz*

## Index

*Average of Impression, Reputation, Quality, Value, Satisfaction & Recommend*

# Memaar Al Morshedy tops the list, while Amer group has seen a drop in its Index Score



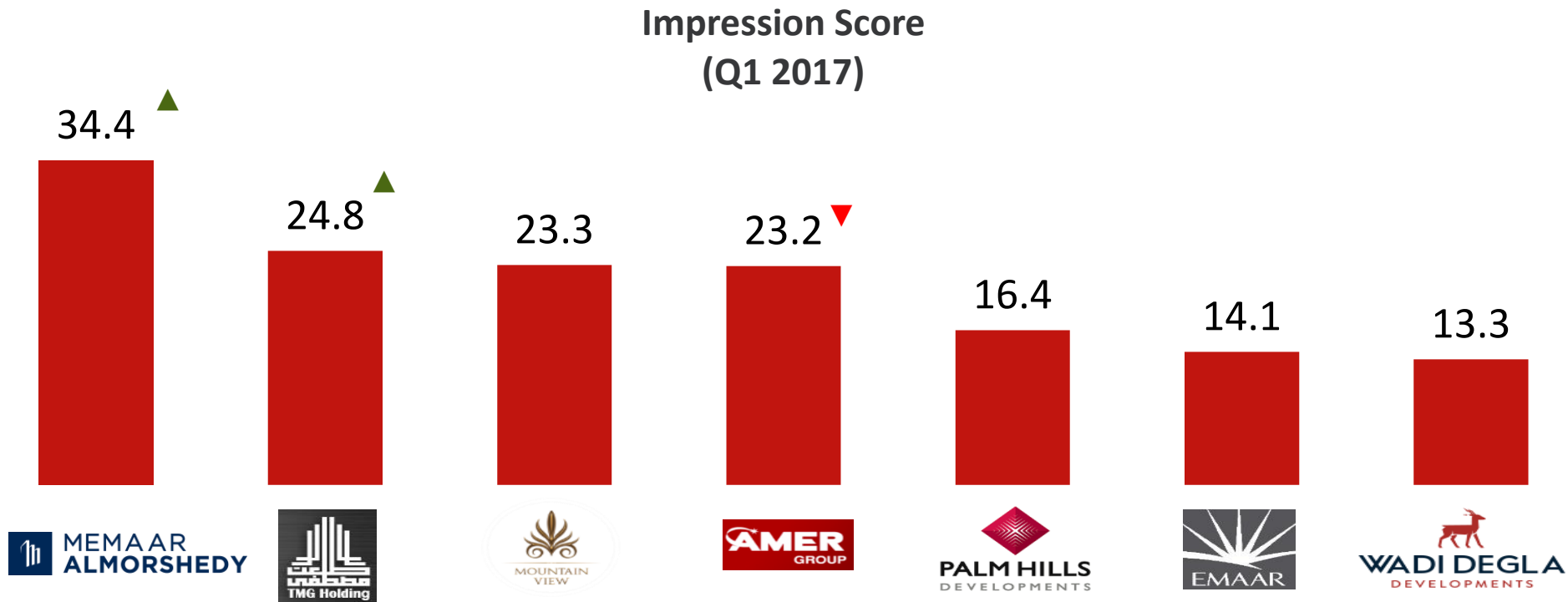
Brands with the highest average Buzz scores in Q1 2017, rated using YouGov BrandIndex's Buzz Score  
Q1 2017 (January till March): Volume = 4110

▲▼ show significant increase/decrease in scores compared to Q4 2016

YouGov



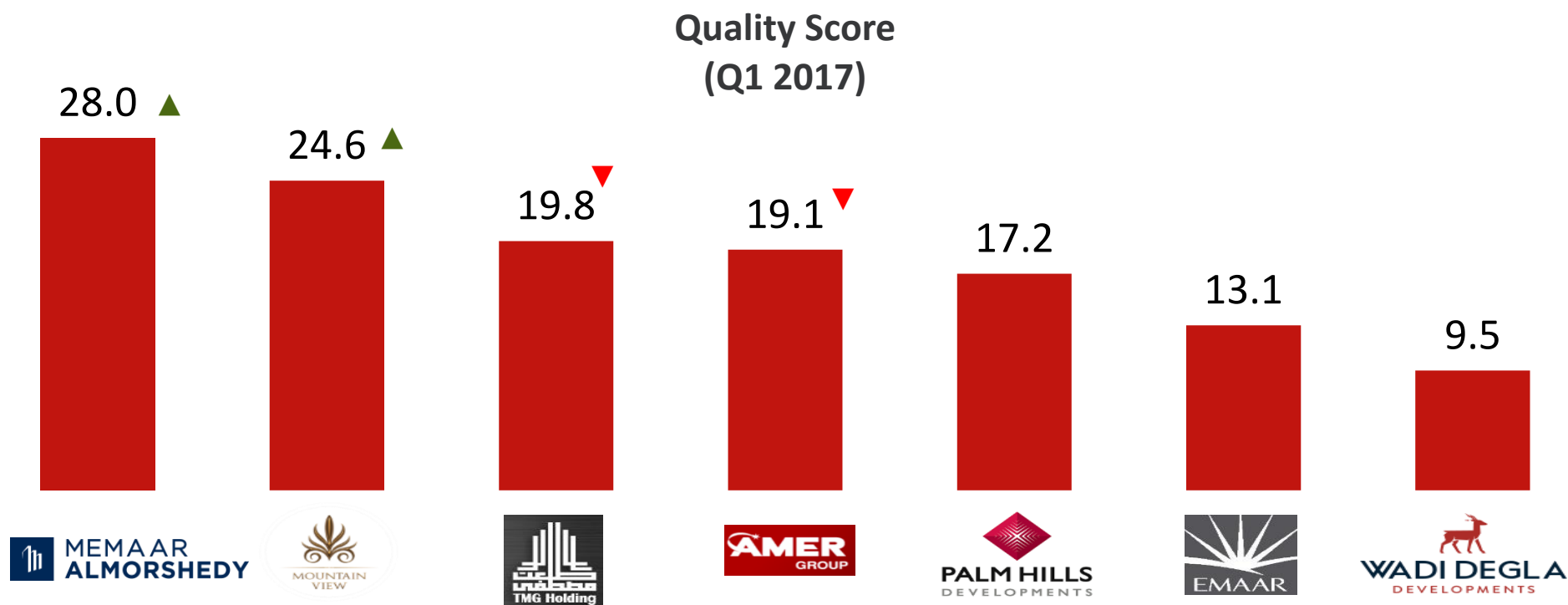
# Decent uptakes by the top 3 real estate developers.



Q. Impression- Do you have a POSITIVE/NEGATIVE Impression about these Real Estate Developers?  
Q1 2017 (January till March): Volume = 4110

▲▼ show significant increase/decrease in scores compared to Q4 2016

# Memaar Al Morshedy remains to have a positive quality, while scores of Talaat Moustafa & Amer group slightly decreased in Q1 2017

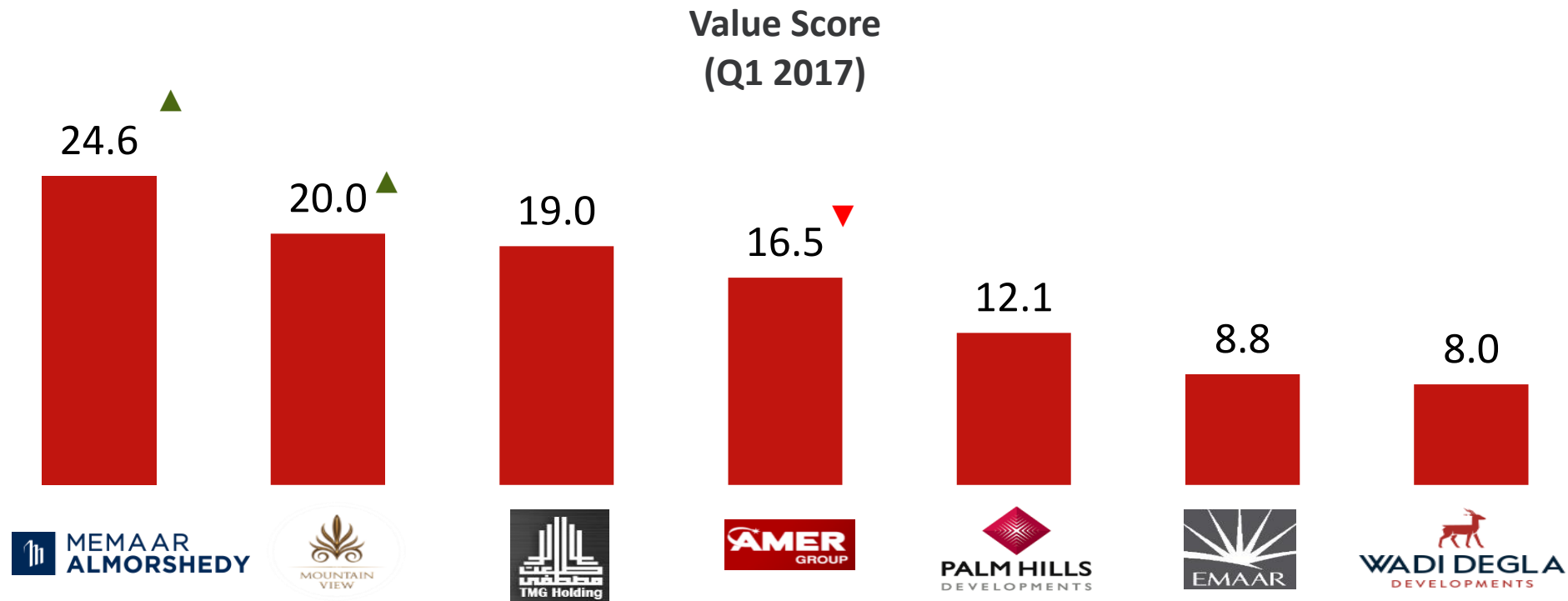


Q. Quality- Do you believe the following Real Estate Developers represent POSITIVE/NEGATIVE Quality?  
Q1 2017 (January till March): Volume = 4110

▲ ▼ show significant increase/ decrease in scores compared to Q4 2016



# The Value rankings remain largely in line with Quality and Index rankings



Q. Value- Do you believe the following Real Estate Developers represent POSITIVE/NEGATIVE Value for Money?

Q1 2017 (January till March): Volume = 4110

▲ ▼ show significant increase/ decrease in scores compared to Q4 2016

Questions?

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