




WIJANTO HADIPURO
Unika Soegijapranata Semarang



REAL ESTAT & PROPERTI:
ASPEK EKONOMI



Topik

- Konteks & peran real-estate properti dalam ekonomi Nasional
 - Konteks & peran real-estate properti dalam ekonomi Regional
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KONTEKS & PERAN REAL-ESTATE PROPERTI DALAM EKONOMI NASIONAL

The Role of Real Estate in the Economy

- Construction (public and private) ...% GDP
- Service Flow, 'shelter', rent ...% GDP
- Assets (residential and non)...% of total national wealth
- Land is part of wealth
- Accounting, measurement difficulties (book versus market value)

Peran Sektor Property

=> Meningkatnya aktivitas pada industri properti dapat dijadikan petunjuk mulai membaiknya atau bangkitnya kegiatan ekonomi => multiplier effect

=> Over supply dapat mengganggu ekonomi nasional; bubble burst

Pertumbuhan PDB

Sektoral	2004**					2005**		
	Q.1	Q.2	Q.3	Q.4	Total	Q.1	Q.2	Q.3
1. Pertanian	4.89	3.85	5.31	1.86	4.06	1.63	(0.96)	1.64
2. Pertambangan	(7.00)	(9.13)	(5.04)	3.28	(4.61)	1.04	(2.87)	(2.32)
3. Industri	5.98	6.87	4.78	7.17	6.19	7.05	6.65	5.59
4. Listrik	6.07	6.76	3.05	7.87	5.91	7.81	7.59	9.78
5. Bangunan	8.36	7.77	8.24	8.31	8.17	7.32	7.44	6.31
6. Perdagangan	2.73	4.09	6.90	9.41	5.80	9.96	9.48	7.88
7. Pengangkutan	12.62	13.33	13.47	11.47	12.70	13.12	13.91	12.87
8. Keuangan	7.48	6.66	8.26	8.45	7.72	6.51	9.97	9.07
9. Jasa-jasa	4.73	5.12	4.73	5.04	4.91	4.90	4.36	5.36
PRODUK DOMESTIK BRUTO	4.38	4.38	5.1	6.65	5.13	6.19	5.54	5.34

Sumber: BPS

Pertumbuhan PDB

Lapangan Usaha	Atas Dasar Harga Berlaku (Triliun Rupiah)			Atas Dasar Harga Konstan 2000 (Triliun Rupiah)			Laju Pertumbuhan 2010 (Persen)	Sumber Pertumbuhan 2010 (Persen)
	2008	2009	2010	2008	2009	2010	(8)	(9)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
1. Pertanian, Peternakan, Kehutanan dan Perikanan	716,7	857,3	985,1	284,6	295,9	304,4	2,9	0,4
2. Pertambangan dan Penggalian	541,3	591,9	716,4	172,5	180,2	186,4	3,5	0,3
3. Industri Pengolahan	1 376,4	1 477,7	1 594,3	557,8	569,8	595,3	4,5	1,2
4. Listrik, Gas dan Air Bersih	40,9	47,2	50,0	15,0	17,1	18,1	5,3	0,0
5. Konstruksi	419,7	555,2	661,0	131,0	140,3	150,1	7,0	0,4
6. Perdagangan, Hotel dan Restoran	691,5	744,1	881,1	363,8	368,6	400,6	8,7	1,5
7. Pengangkutan dan Komunikasi	312,2	352,4	417,5	165,9	191,6	217,4	13,5	1,2
8. Keuangan, Real Estat dan Jasa Perusahaan	368,1	404,0	462,8	198,8	208,8	220,6	5,7	0,5
9. Jasa-jasa	481,9	574,1	654,7	193,1	205,4	217,8	6,0	0,6
Produk Domestik Bruto (PDB)	4 948,7	5 603,9	6 422,9	2 082,5	2 177,7	2 310,7	6,1	6,1
PDB Tanpa Migas	4 427,6	5 139,0	5 924,0	1 939,6	2 035,9	2 169,5	6,6	-

Kapitalisasi Properti Nasional

No.	Proyek	Tahun							Nilai Kapitalisasi (Rp Miliar)
		1999	2000	2001	2002	2003P	2004P	2005P	
1	Pusat Perbelanjaan Jabotabek	1,469	2,756	4,484	9,828	15,937	21,368	19,363	75,206
2	Pusat Perbelanjaan Modern Daerah	79	181	578	4,152	13,440	16,539	13,368	48,338
3	Apartemen Jabotabek	271	798	916	1,484	4,064	7,909	11,860	27,303
4	Apartemen Daerah	-	-	158	249	362	236	311	1,317
5	Perkantoran Jabotabek	500	727	604	106	577	871	1066	4,451
6	Hotel (Nasional)	-	-	-	59	885	1,319	1328	3,591
7	Perumahan (Nasional)	1,993	3,495	4,037	7,129	8,708	11,571	15,078	52,011
8	Ruko/Rukan Nasional	1,096	1,922	2,220	3,938	5,582	6,364	7,812	28,935
	Kapitalisasi Nasional (Rp miliar)	5,408	9,879	12,998	26,946	49,558	66,179	70,187	241,154

Sumber: Pusat Studi Properti Indonesia

Kapitalisasi Properti Nasional

Pembagian Kredit KPR terhadap kapitalisasi Bisnis Properti 2002-2008							
Keterangan	2002	2003	2004	2005	2006	2007	2008
Sertifikat BI/BI rata-rata/tahun (%)	14,95	9,50	7,45	10,90	11,83	8,81	8,75
Penjualan rumah baru nasional (unit)	121.302	134.549	150.627	183.799	172.122	202.863	235.682
Penjualan Rumah Sederhana (unit)	74.004	79.557	87.844	110.832	105.349	128.100	153.400
Nilai Kapitalisasi Properti (Rp Miliar)	12.800	18.464	25.257	34.900	38.646	48.038	57.729
Tingkat pertumbuhan nilai kapitalisasi (%)	74,6	44,2	36,8	38,2	10,7	24,3	20,2
Ekspansi kredit properti (Rp Miliar)	3.950	8.337	11.991	13.935	16.679	21.540	27.347
Tingkat pertumbuhan KPR, KPA, KPRK (%)	9,3	38,3	39,8	33,1	29,8	29,6	29,0
Akumulasi Kredit KPR (Rp Miliar)	21.771	30.108	42.099	56.034	72.713	94.253	121.600
Pembagian nilai KPR, KPA, KPRK terhadap nilai kapitalisasi (%)	30,9	45,2	47,5	39,9	43,2	44,8	47,4

Rencana Produksi Pengembang

Jenis Produk Properti	Unit		
	Jangka Pendek	Jangka Menengah	Jangka Panjang
Perumahan < 70	11.295	61.921	71.383
Perumahan > 70	4.196	12.090	14.228
Apartemen	5.242	4.596	402
Retail	520	2.069	1.477
Shopping center	3	30	50
Kawasan Industri	10	10	10
Perkantoran	66	211	2

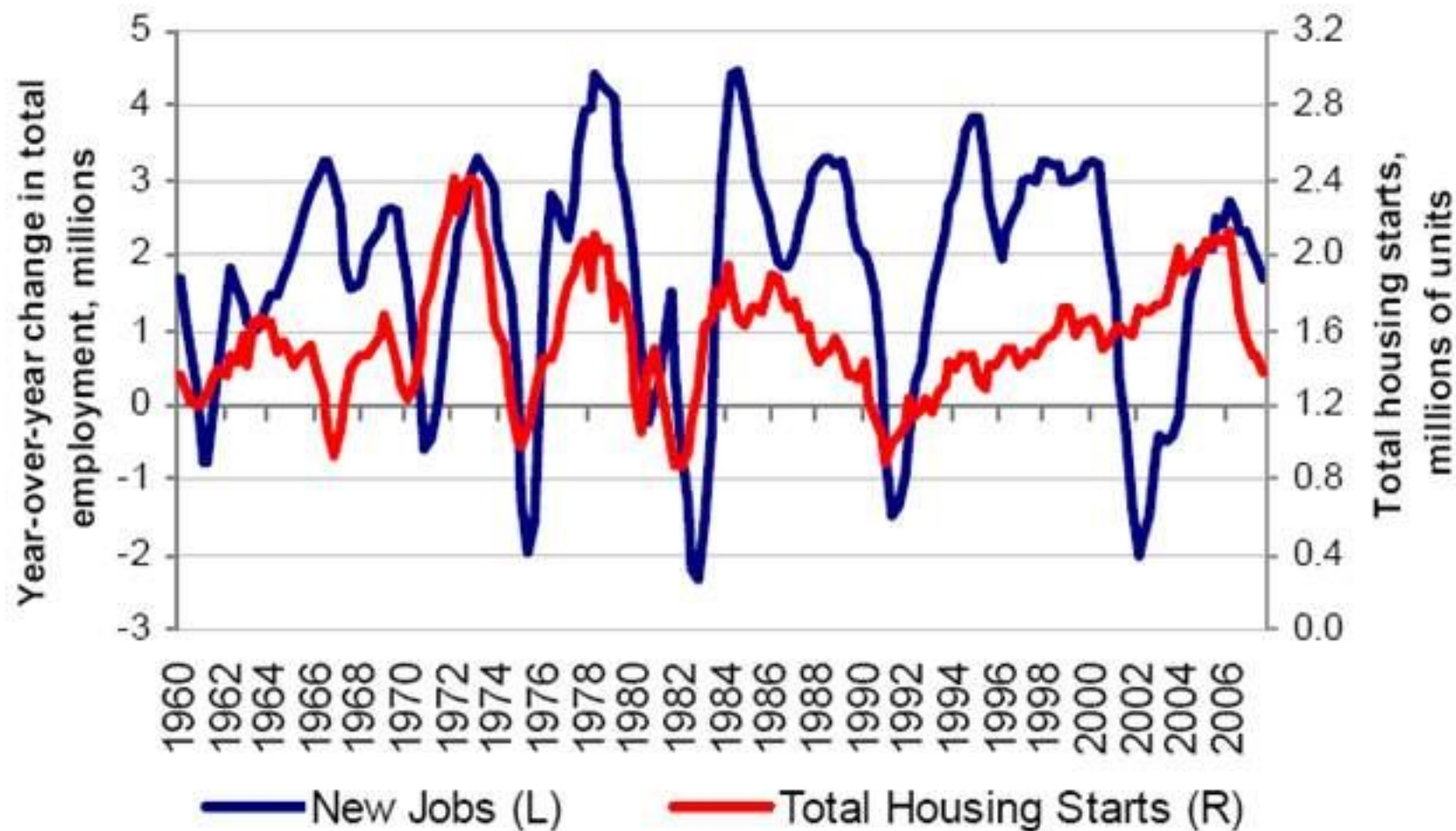


Economic Recession

A significant decline in GDP or negative economic growth in two or more consecutive quarters

Recession and housing production

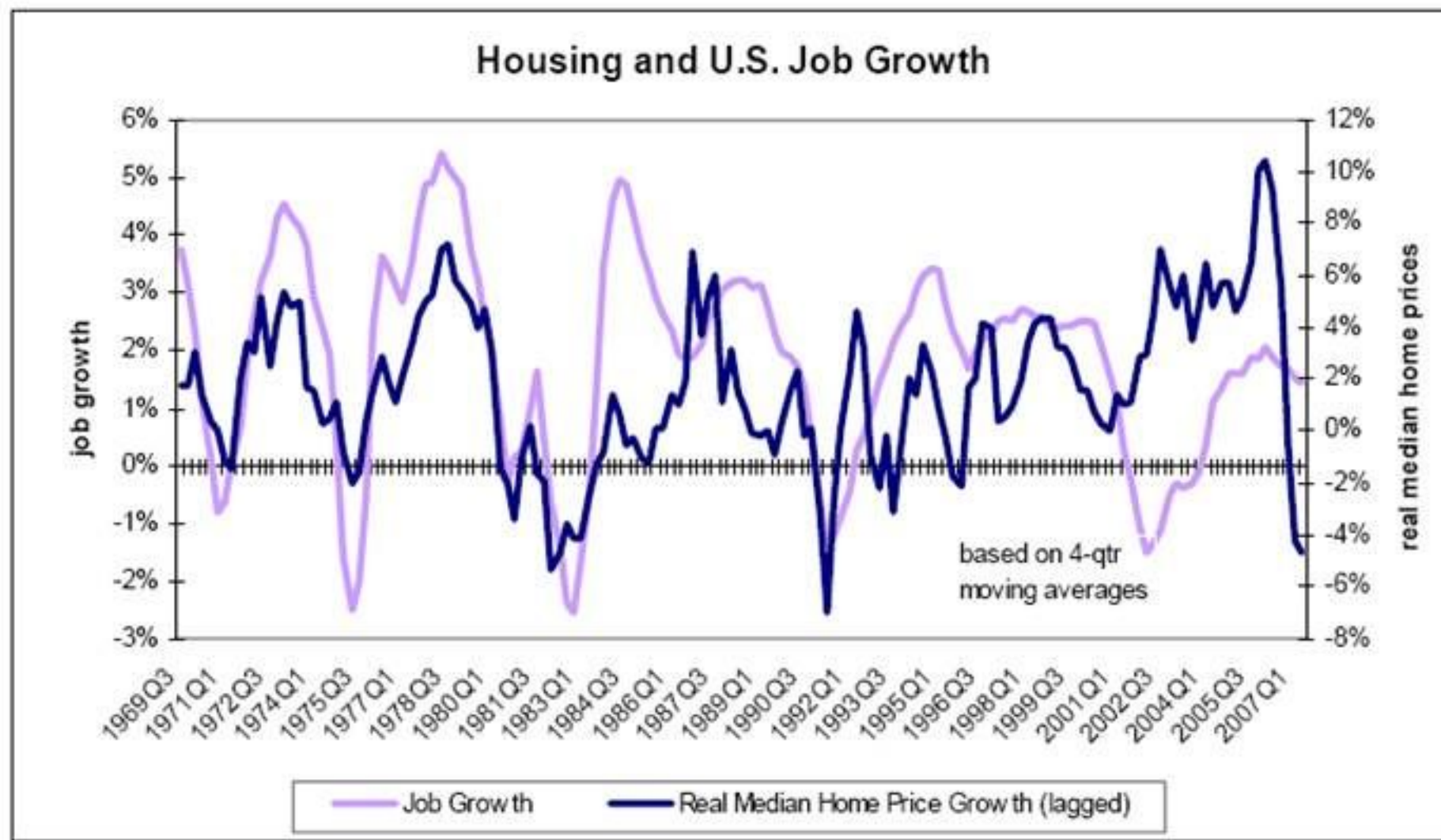
Perfect Historic correlation between economic recessions and Housing Production – except for the last 5 years



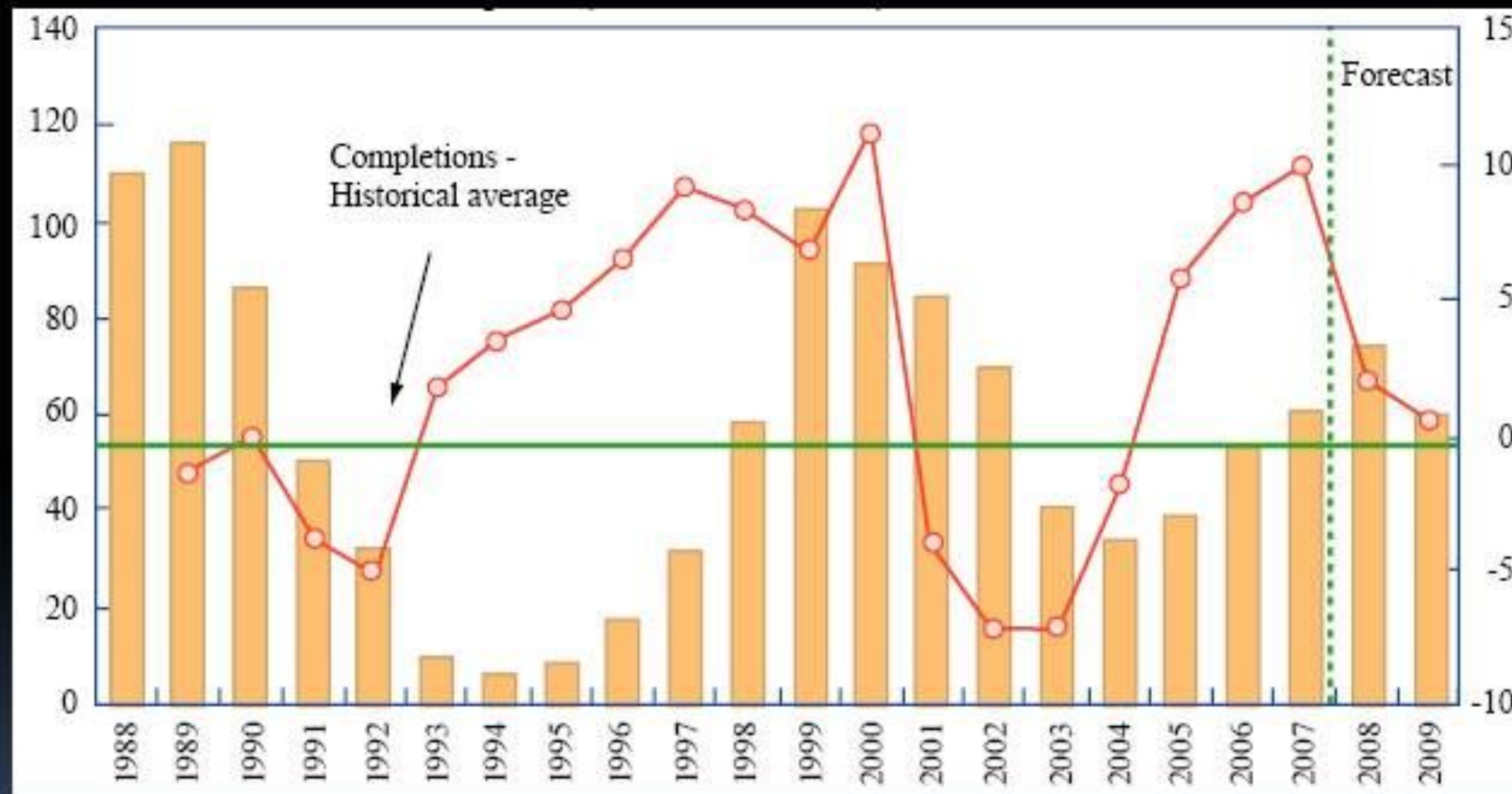
Sources: BLS, BOC, TWR.

Recession and housing prices

Perfect Historic correlation between economic recessions and Housing Prices – except for the last 5 years



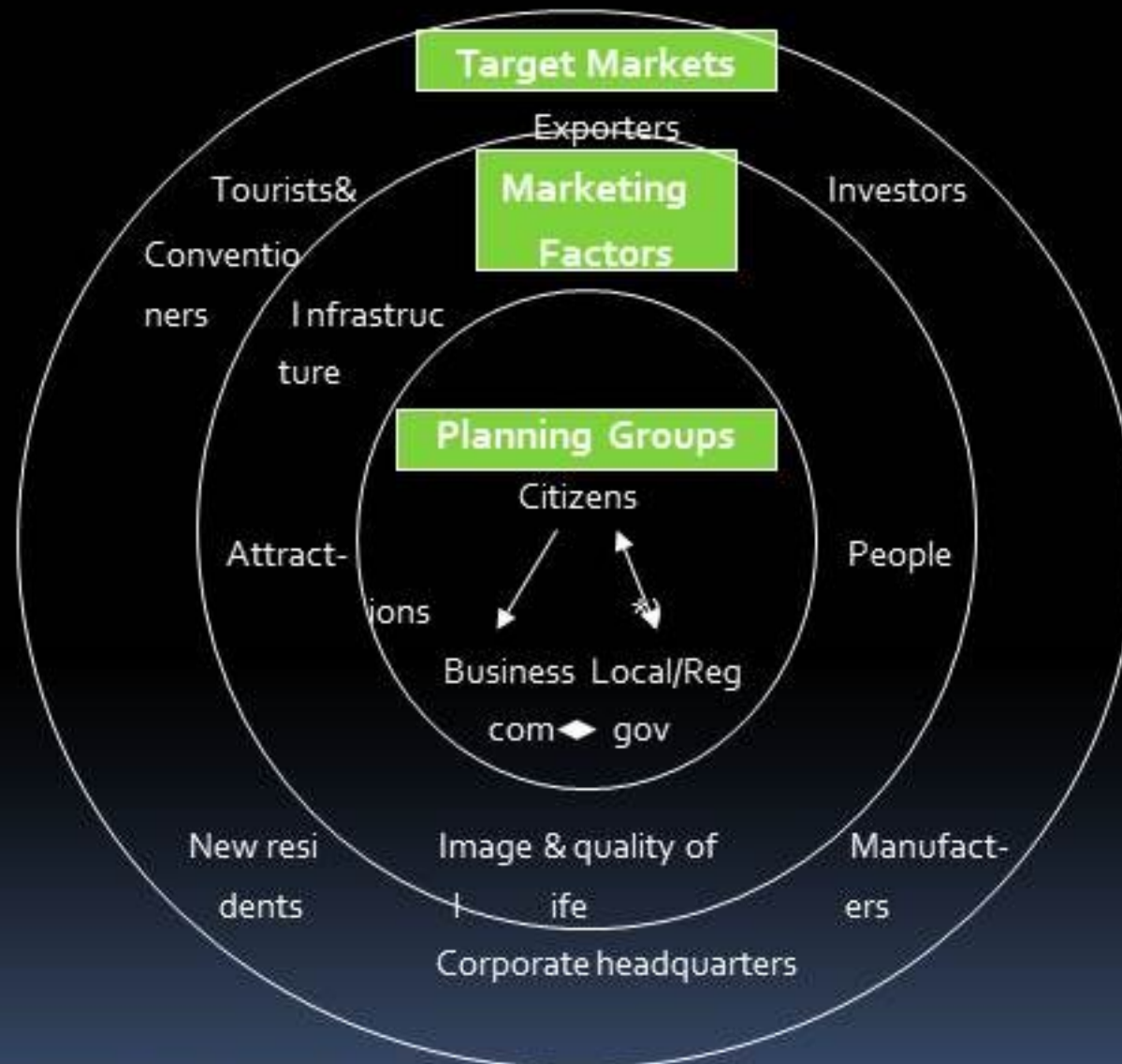
Real estate cycles: office building booms generate falling rents





KONTEKS & PERAN REAL-ESTATE PROPERTI DALAM EKONOMI REGIONAL

Peran Real Estate dan Property dalam City Marketing



*) Place Marketing Plan: diagnosis, vision, action



Four Broad Strategies for Marketing Places

- Image marketing
- Attraction marketing
- Infrastructure marketing
- People marketing

Image Marketing

- A unique and distinguishing image through a clever slogan that is believable and demonstrable
- A place's image must be valid and communicated in many ways and through many channels
- Five image situations: overly attractive image, positive image, weak image, contradictory image, negative image



Malacca the historic city of
Malaysia

Attraction Marketing (physical features and events that appeal to target buyers)

- Improving image is not sufficient, places also need to invest in specific attractions => Petronas and other Guinness attraction; conversion of a downtown area into a pedestrian mall; capitalization on major business streets for certain products and services



Attraction Marketing: Urban Redesign and Planning

- Includes: architecture, open spaces, land use, street layout, pedestrian areas, cleanliness, and environmental quality.
- Examples: Petronas, China town in Singapore.



Attraction Marketing: China Town in Singapore



Infrastructure Marketing


- Neither image or attractions can provide the complete answer to a place's development, effective infrastructure is required at the base => streets, highways, railways, airports, science park, telecommunication networks: excellent, outstanding application experience, niche application position, low tariffs



Infrastructure Marketing

Community-service Development:

Includes: good schools, health facilities, day-care service, accessible bureaucracy, IT service.





People Marketing

- Five forms of people marketing: famous people, enthusiastic local leaders, competent people, people with an entrepreneurial profile, people who have moved to the place



**FAKTOR-FAKTOR EKONOMI YANG
PERLU DIPERTIMBANGKAN DALAM
PENYELENGARAAN BISNIS REAL
ESTAT & PROPERTY**

Persepsi Industri Properti ke Depan

