



# Research & Reports by RISE Infra

**Delhi-NCR Real Estate Insights**

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**November 2022**

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NCR



## End users take control; Sharp V-shaped recovery to continue

The furious action in the recently concluded festive season, coupled with steady post-pandemic changes in the Delhi-NCR market, clearly points to a great Real Estate (RE) resurgence that the region is readying for. As in the past, there are certain key indicators are emerging in Delhi-NCR that clearly establish that the RE segment is looking at good times ahead. The three key insights, that point to the strengthening of the Delhi-NCR markets to a level seen around two decades ago, are:

**End-user taking  
over the market**

**Pandemic-induced  
lifestyle changes**

**Furious festive  
growth this year**

The real estate market which has already touched the 2014 peak, and now seems all set to emulate the cycle seen in the early 90s and the 2004-05. If it follows the same growth trajectory, it can be said that the Delhi-NCR segment is ready to script a success story that will match, if not surpass the era that's fondly remembered as the golden era for the sector.

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**1.** End-users establish firm grip on the market; Buck the trend of last two decades.



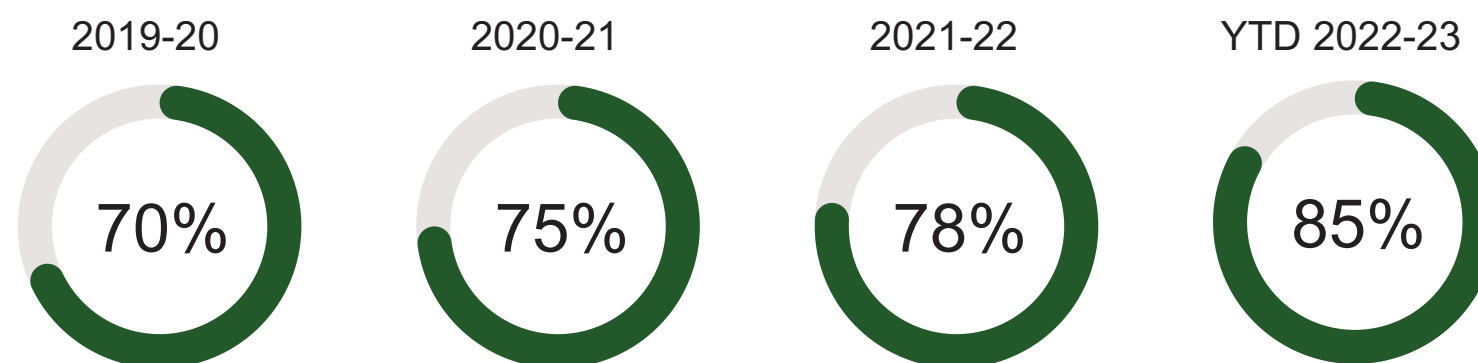
**2.** Festive sales breach 2014 peak; euphoric buyers, indicate a sharp V-shaped recovery.



**3.** On back of strong tailwinds, growth trajectory set to emulate early-90s, 04-05 growth.

## Tightening grip of End Users

While the pre-pandemic market saw investors playing a dominant role, post-pandemic sentiment has brought back the change in the trend with the end-users taking the grip over the market right back.

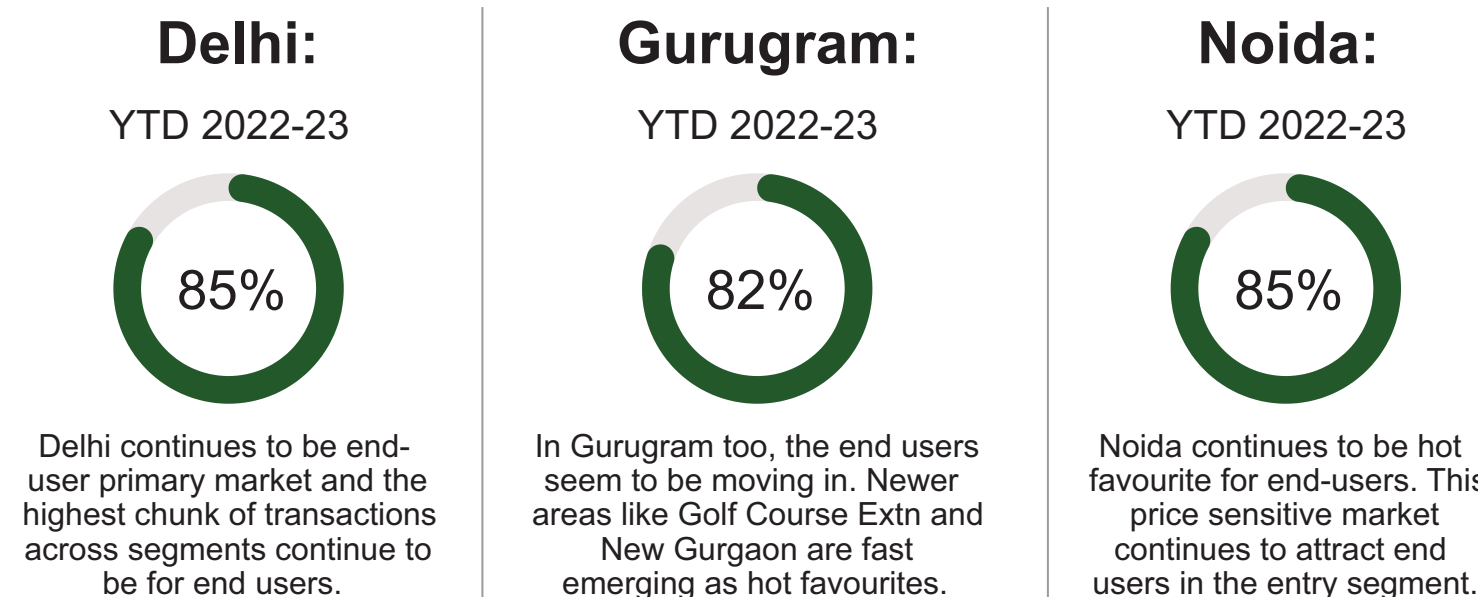


### Delhi-NCR

Post-pandemic the end-users have steadily taken control of the Delhi-NCR market. The trend is expected to continue further and might even touch around 90% in the next couple of years.

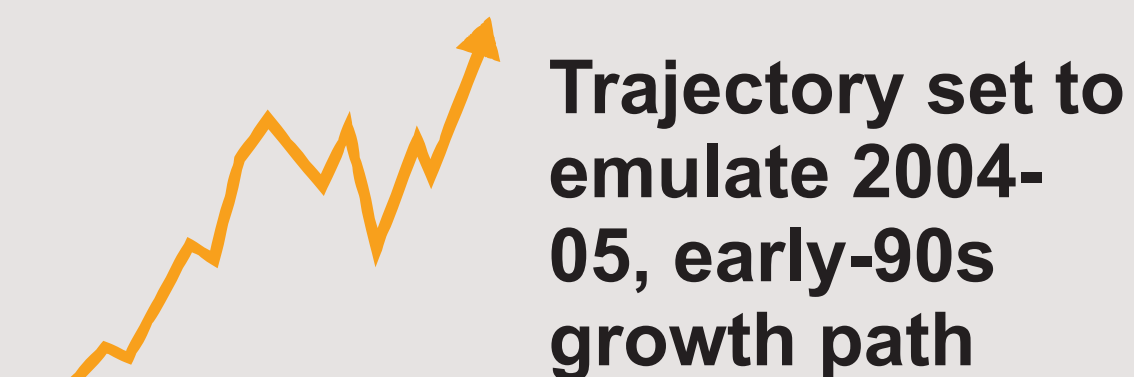
The last time the region witnessed such end-user dominance was in 2004-05, when the ratio between end-users and investors touched 90:10.

Interestingly, prior to 2004-05 period, such dominance was seen in early-90s on the back of the economic reforms.



## Festive sales spur V-shaped recovery; scale 2014 peak

Especially post-pandemic, the real estate sector has witnessed a great recovery and has successfully breached previous milestones. Against a 2019 total home sales of 3.4 lakh units, year 2022 has till date witnessed a total sales of 3.59 lakh units in the top seven markets, with NCR registering a sale of a whopping 59,342 units. This is going to continue and the numbers are likely to go up exponentially.



One look at the current end-user dominance along with the buoyant sales numbers, the familiarity with earlier upswing cycles can't really be missed. High sale numbers, new launches and entry of newer end users in the past has led to consistent and sustained growth for the RE segment over a period of time. The last time this trend was witnessed was in early-90s and around 2004-2005.



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## YOLO-Index

You-Only-Live-Once seems to be the mantra for Real Estate consumer today. With family's wellness and a stress-free life becoming top priority for the buyers, factors that influence home-buying decisions are changing rapidly

68%

**Buying a home closer to workplace**

Among those who are looking at resuming full time working from office, 68% of home buyers are using being close to the work place as an essential parameter to either buy their first home or upgrade their property.

72%

**Hybrid, WFH mean demand for extra space**

72% of those who are looking at a hybrid work arrangement going ahead, are looking at extra space towards a dedicated workstation which affords them some level of privacy. This is both for first time home buyers and those upgrade their existing home.

82%

**Lifestyle is a high priority while deciding on a home**

82% of home buyers today are looking at improving their quality of life but also safeguards them against another pandemic-like event. These parameters include facilities like club house, swimming pool, walking tracks, sporting facilities, physical attributes activities, etc.



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# R&R by RISE Infra

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