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Inner City Apartments 2012 – 2019



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The face of the Inner Cities of Sydney, Melbourne and Brisbane have all undergone major transformations over the past fifteen years as these areas become viable residential locations. BIS Shrapnel's Inner City Apartment Market studies analyse the drivers determining the factors underpinning demand and supply, and forecast the outlook for these unique components of the residential market.

Approach

BIS Shrapnel's Inner City Apartment studies implement a forecasting methodology developed across a number of years since the first Sydney report was produced in 1997.

■ Understanding the market forces...

Using BIS Shrapnel's expertise in property related market research, the demand aspects of the Inner City Apartment Markets are thoroughly researched and explained. Major apartment projects in the development pipeline are identified and tracked to determine the current and future level of supply.

■ Modelling the market process...

With a thorough understanding of the market, the major market drivers are identified. The market drivers are then incorporated in a model of the market process.

■ Forecast the market to the year 2019...

The Inner City Apartment Market is forecast annually to the year 2019. The model investigates the components of apartment demand and provides the likely supply response. All forecasts involve BIS Shrapnel's team of renowned economists.

Outcomes

BIS Shrapnel forecast apartment completions, together with vacancy rates, market specific price growth, and rental growth annually out to 2018-19.

Population Profile

An integral part of the 2012 studies is a detailed analysis of apartment residents using data from the 2006 Census.

Coverage

The report firstly considers the Inner City Apartment Markets within the context of the overall Metropolitan area. The focus then moves to the Inner City and in particular, those locations in which the major apartment development is being concentrated, splitting up these areas into component sub-regions, or precincts, that display unique demographic characteristics, and demand and supply fundamentals.

Sydney

The Inner Sydney Apartment Market study divides Inner Sydney into eight distinct precincts consisting of:

- The Quay precinct – the dress circle, top of the market apartment scene
- The Central CBD – location of new high rises and office conversions

- Southern CBD – including Chippendale, with a student apartment focus
- Pyrmont – location of the largest amount of site regeneration
- East Sydney – Sydney's oldest apartment location
- Surry Hills – scene of smaller project activity
- South Dowling Street/ Green Square – now Inner Sydney's largest apartment location
- North Sydney – inner city location across the bridge.

Melbourne

The eight main precincts of the Inner Melbourne Apartment Market study, chosen for their distinctive demand attributes, are examined:

- CBD – scene of most building action, both new construction and conversions
- University – the preferred location of the student market
- Southbank – the high rise apartment phenomenon
- St Kilda Road – upmarket owner occupiers
- St Kilda – Melbourne's oldest apartment location
- Port Melbourne – former industrial area
- Docklands – Melbourne's newest apartment address
- South Yarra – established apartment location experiencing a surge in new supply.

Brisbane

The Inner Brisbane Apartment Market analyses eight distinct apartment precincts, determining the differing factors driving demand in each:

- Brisbane CBD/Spring Hill – the newest apartment scene
- Kangaroo Point – Brisbane's first high rise location
- North East – the Urban Renewal Area surrounding Fortitude Valley and New Farm
- Southbank/West End – across the river from the CBD
- Toowong/Auchenflower – the preferred location of the student market
- Inner North – the new urban renewal areas directly north of the CBD
- Woolloongabba – the redevelopment areas south of the CBD
- Hamilton – Northshore Hamilton urban renewal area.

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