

Lightstone Property

Detailed information on property in South Africa



What to expect...

National property market

Cape Town vs the rest

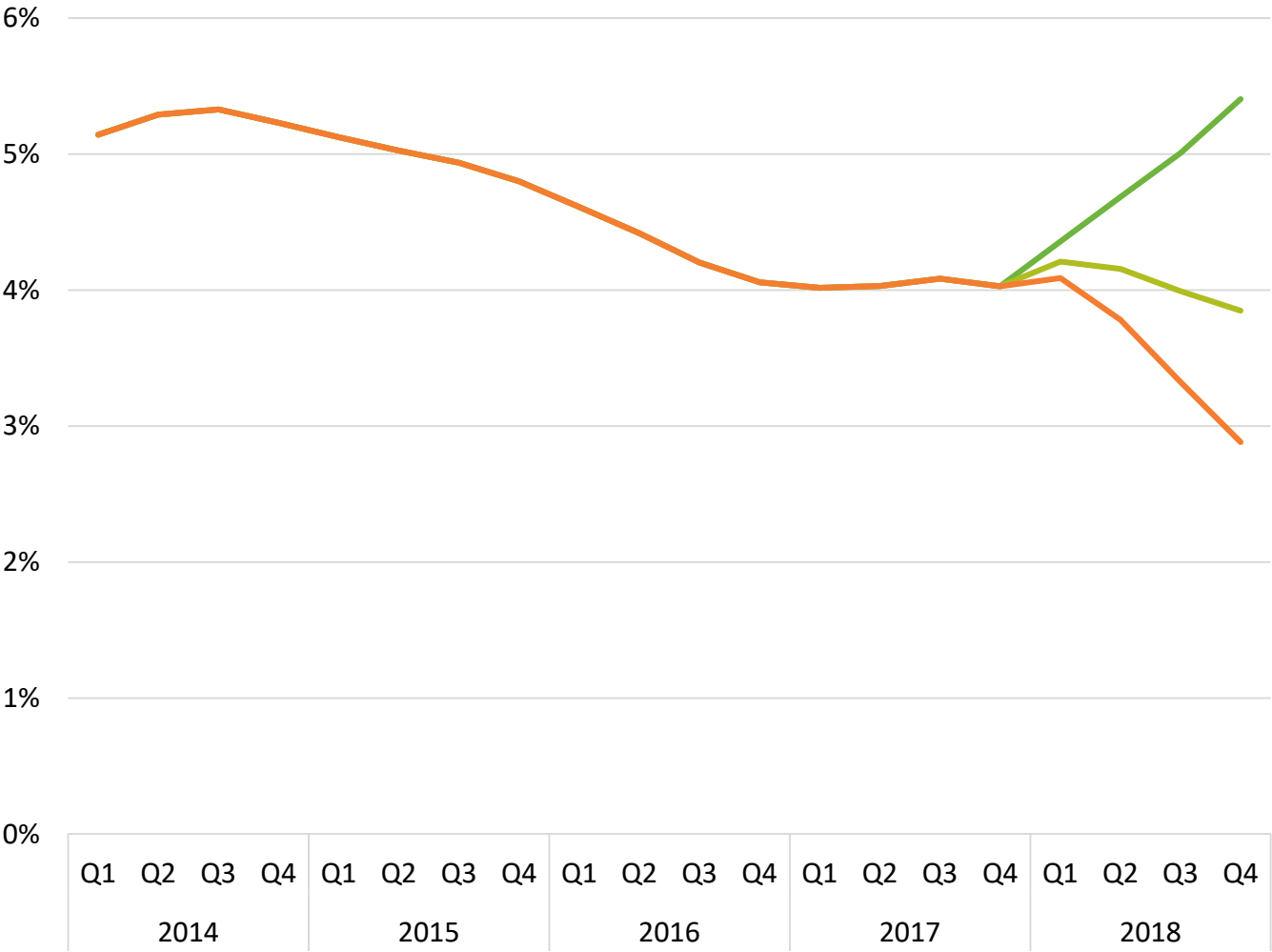
Cape Town hotspots

Buyer demographics

Information available to property buyers

National house price growth forecast

Lightstone house price inflation forecast (year-on-year)



Current annual inflation rate is **3.97%**
Monthly is **0.27%**

High Road
Scenario
5,4%

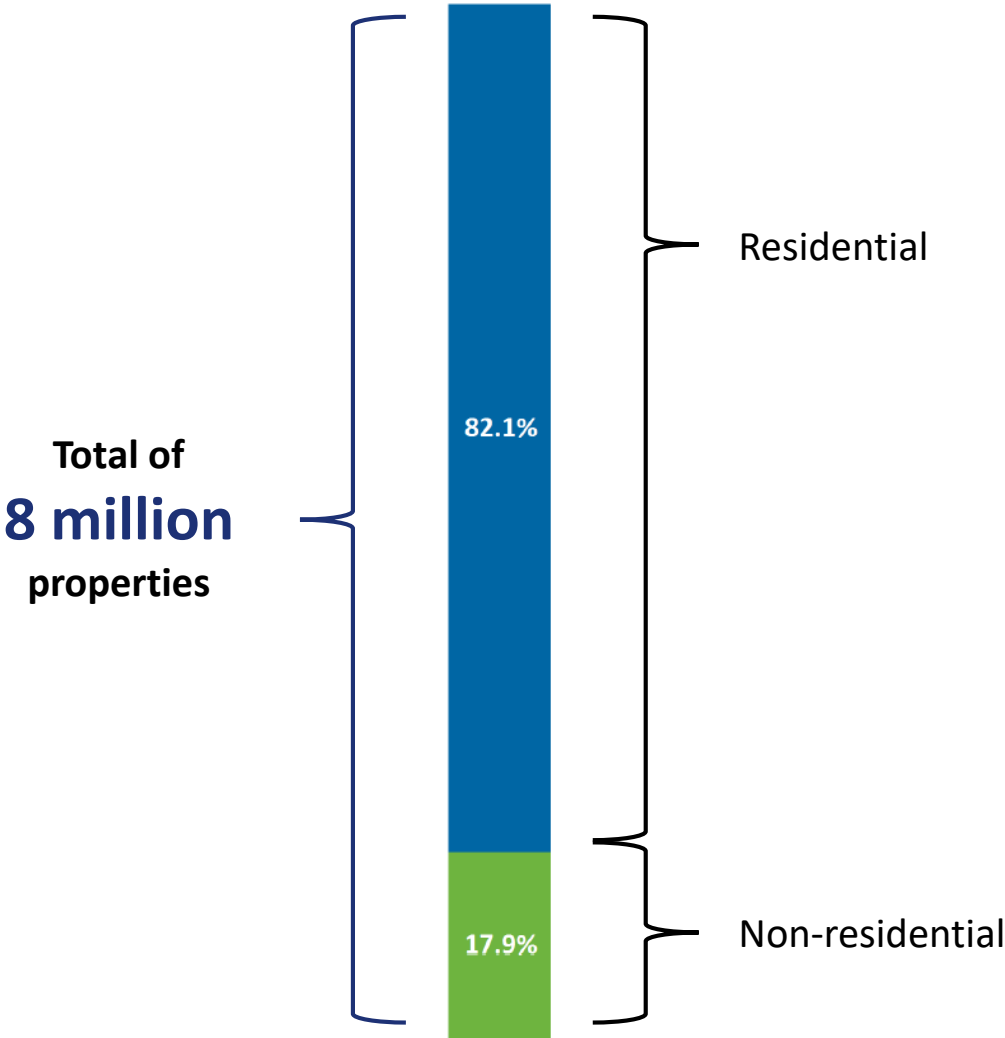
Forecast
3,9%

Low Road
scenario
2,9%

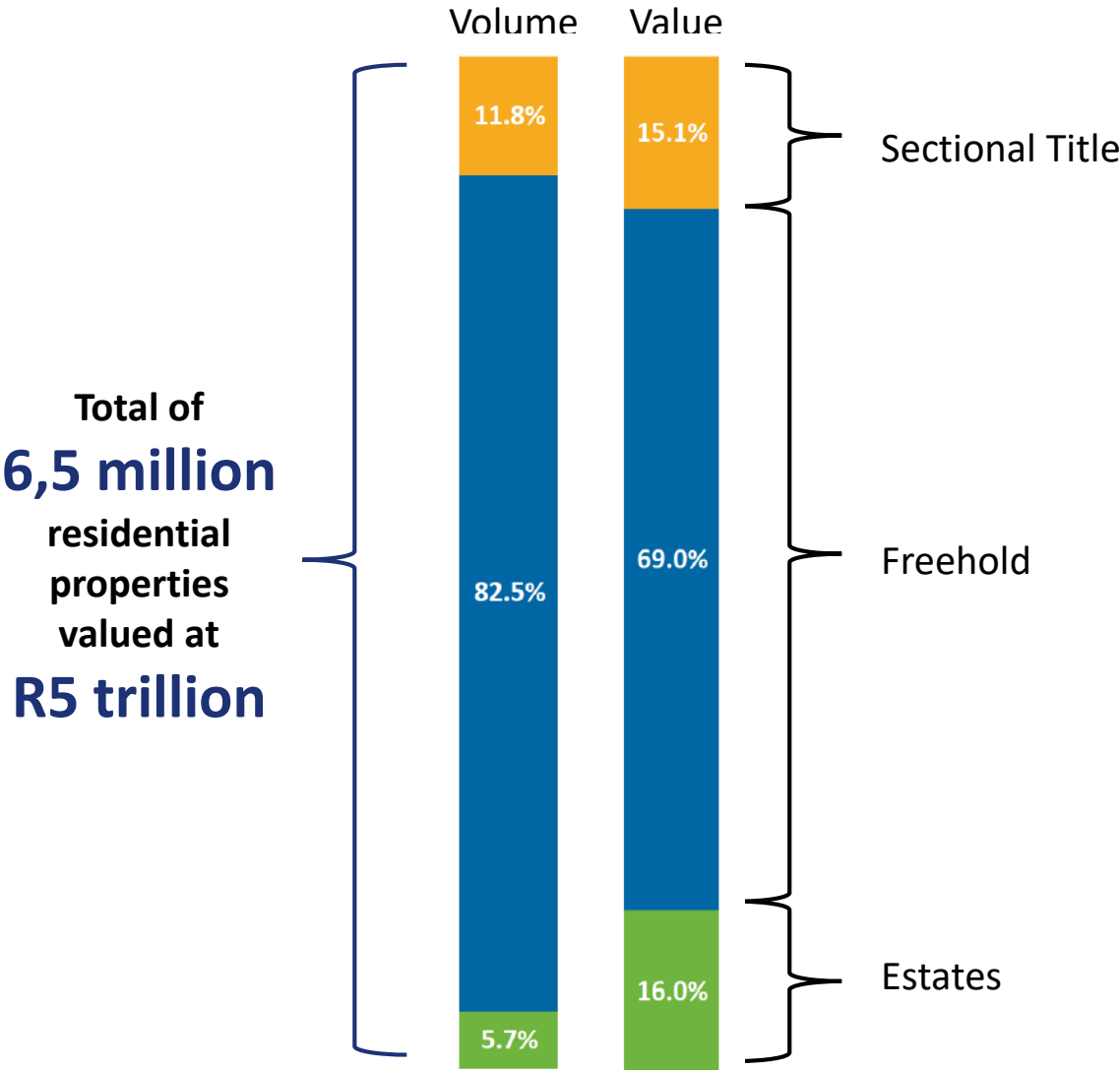


Property market overview

Residential vs Non Residential



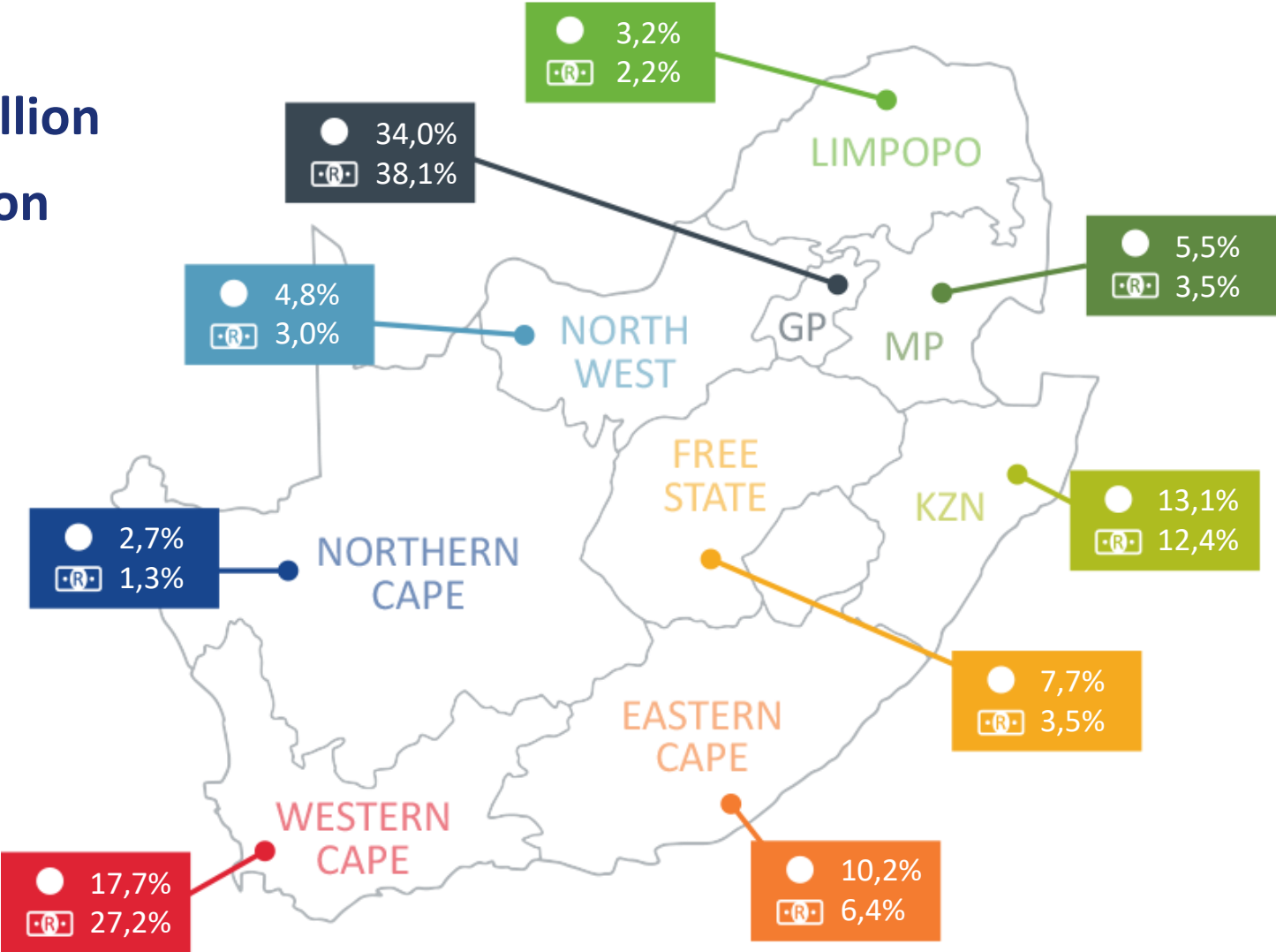
Residential Property Type



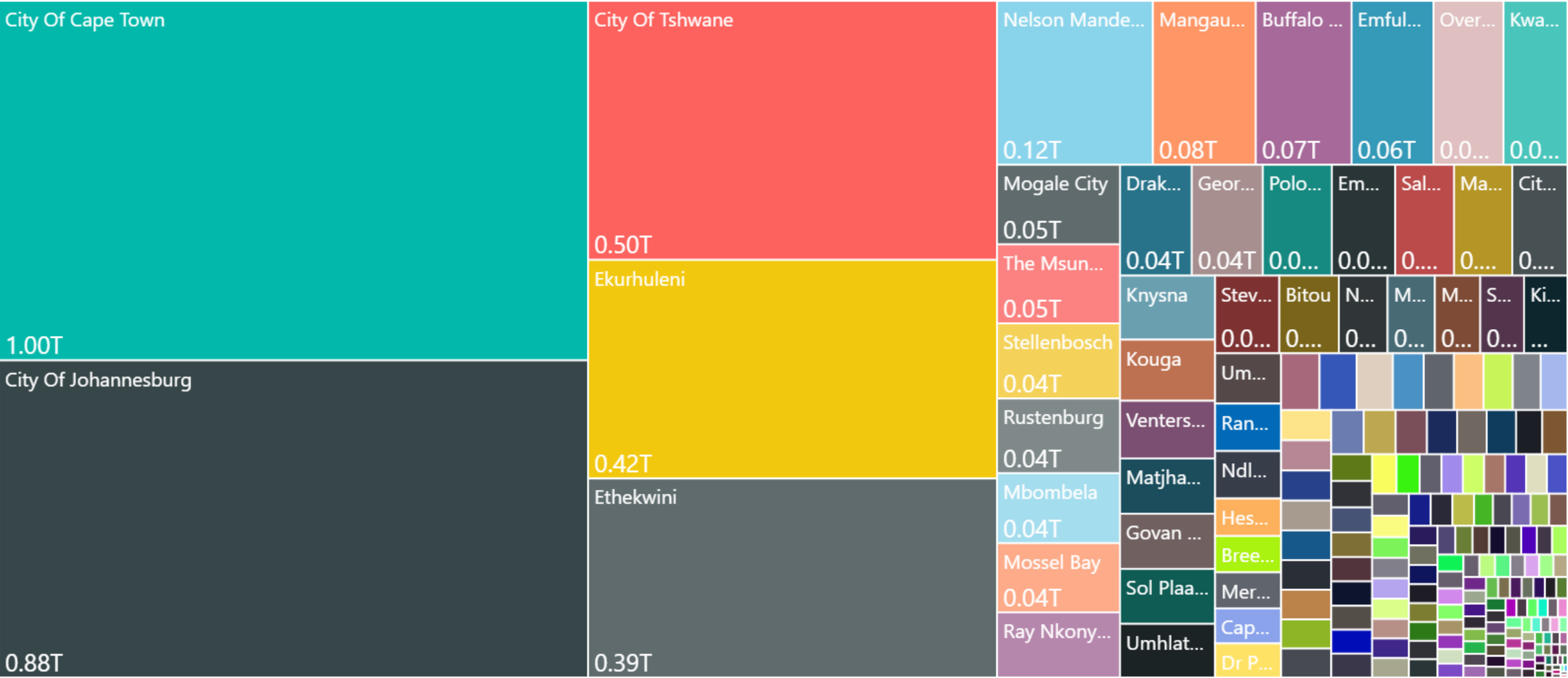
Disparity in the residential property market

● Volume: 6,5 million

▣ Value: R5 trillion



Municipal breakup of residential property value



We are here...

National property market

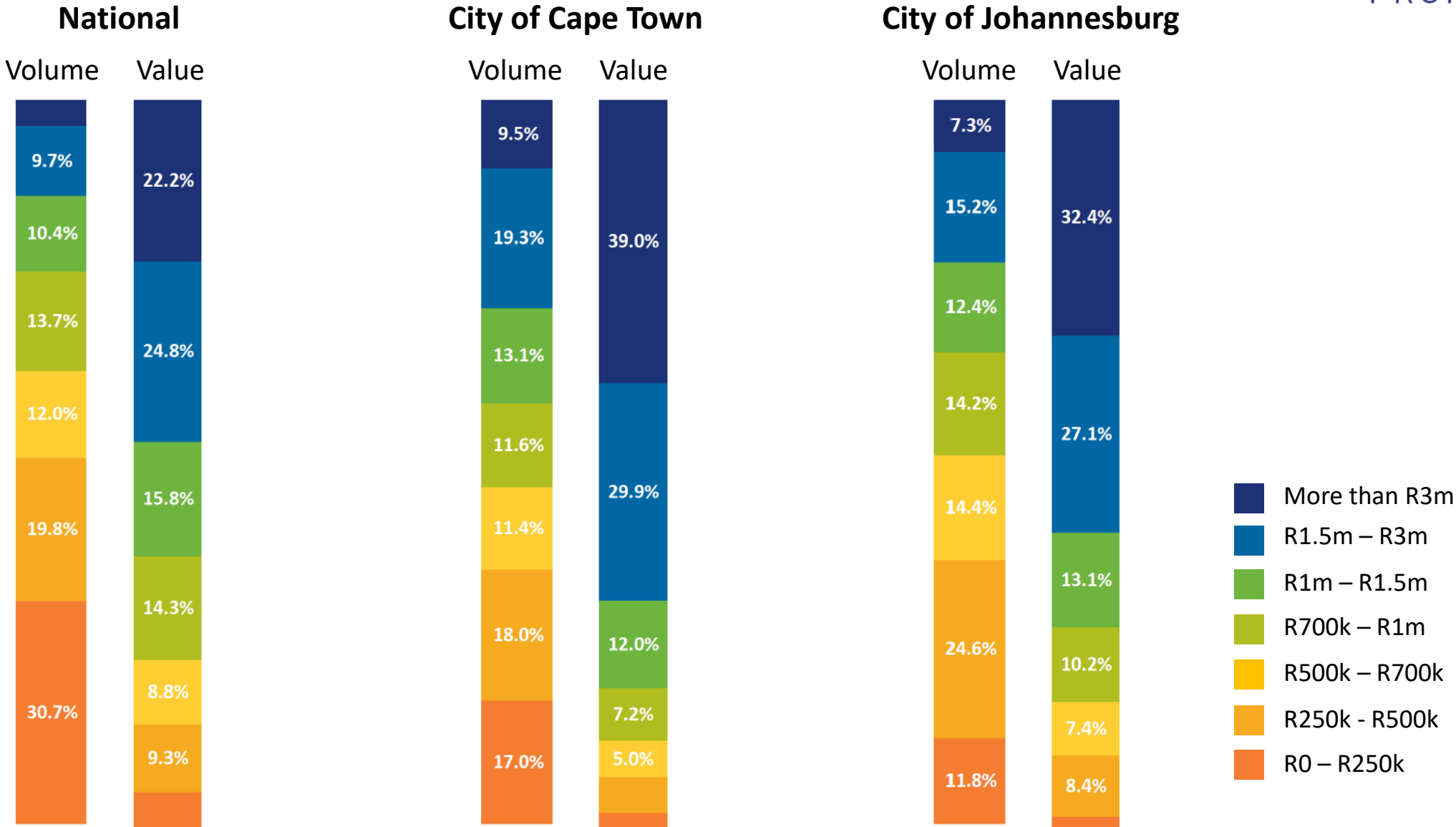
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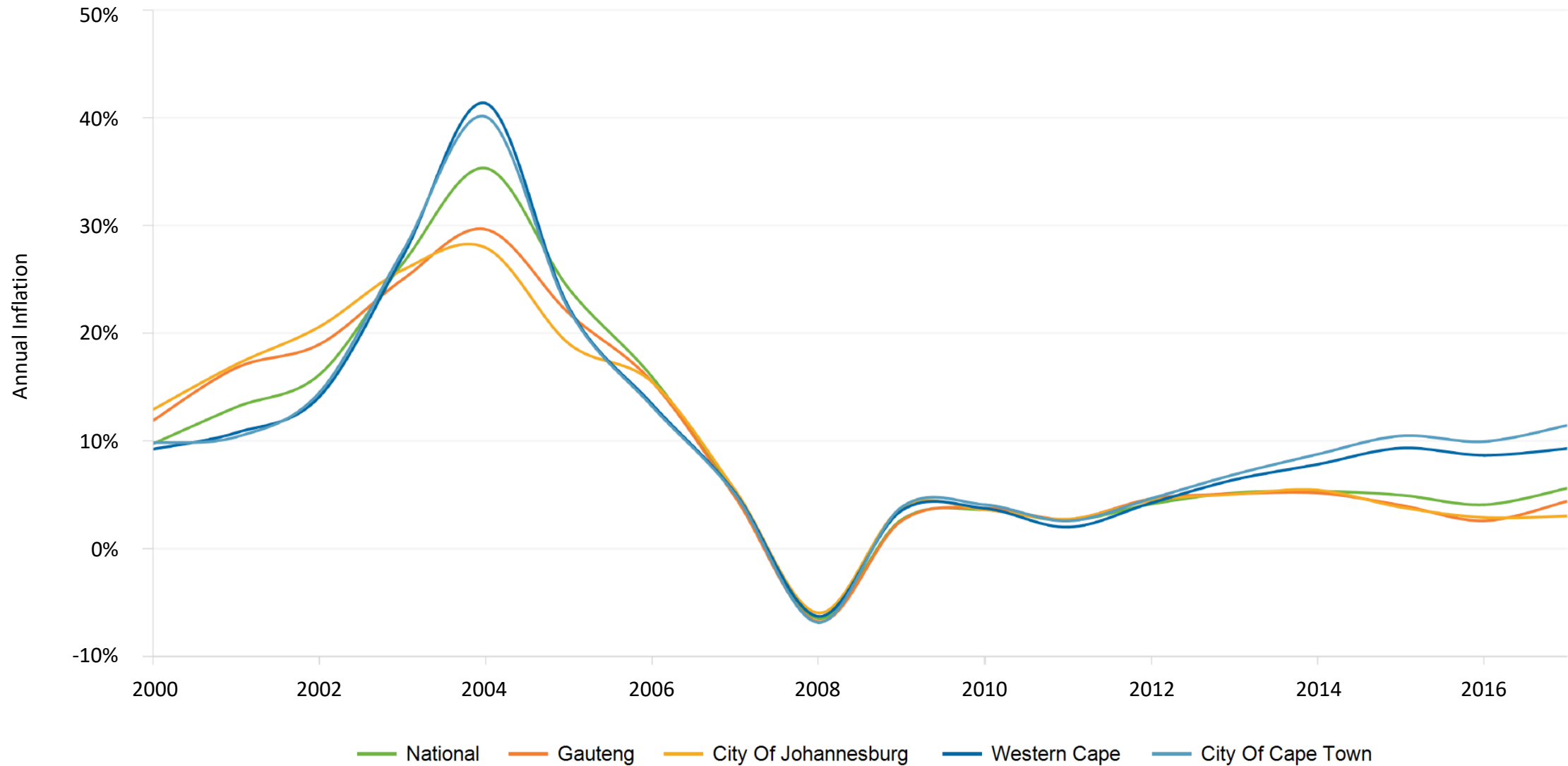
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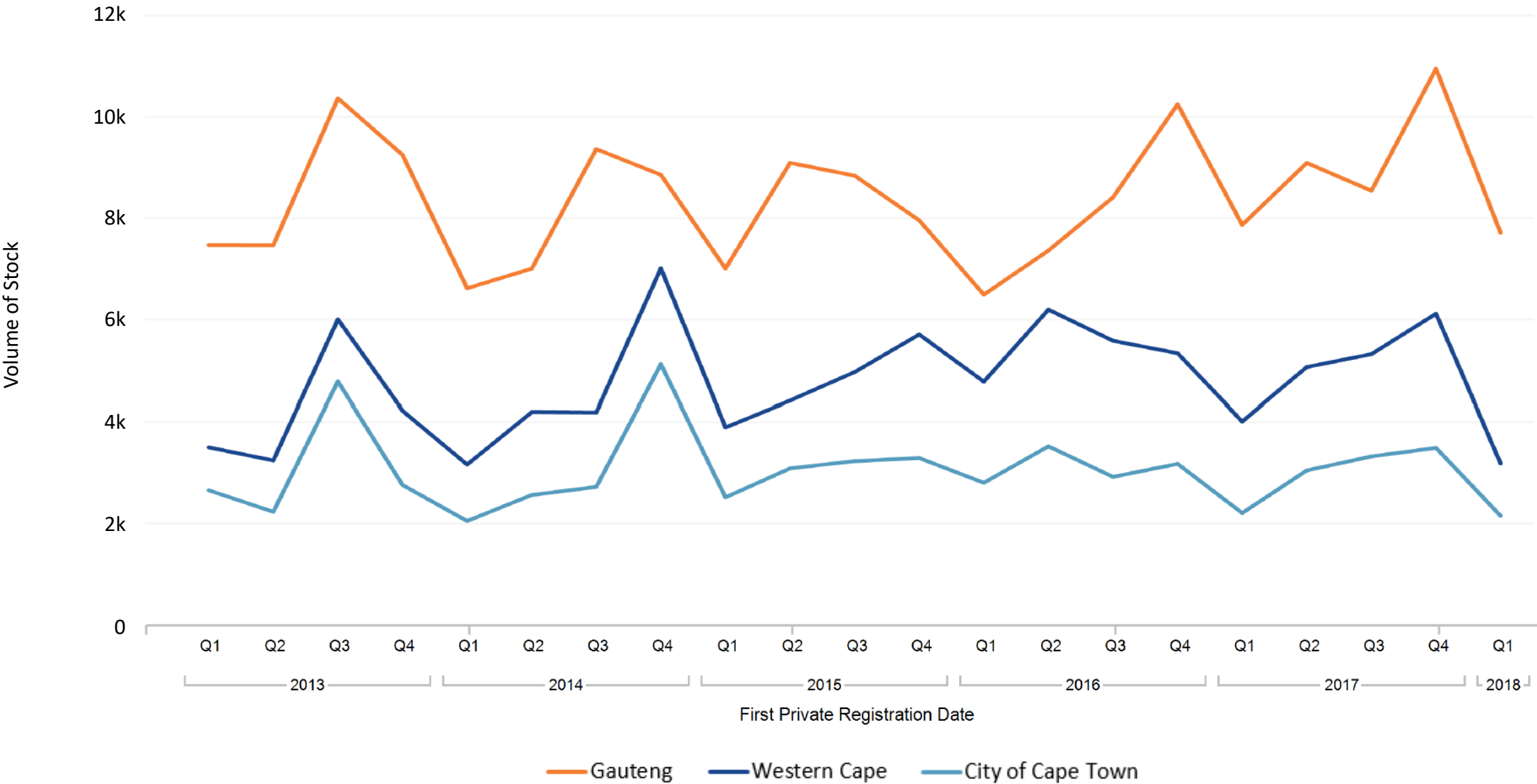
Overview of property stock – segmenting within residential



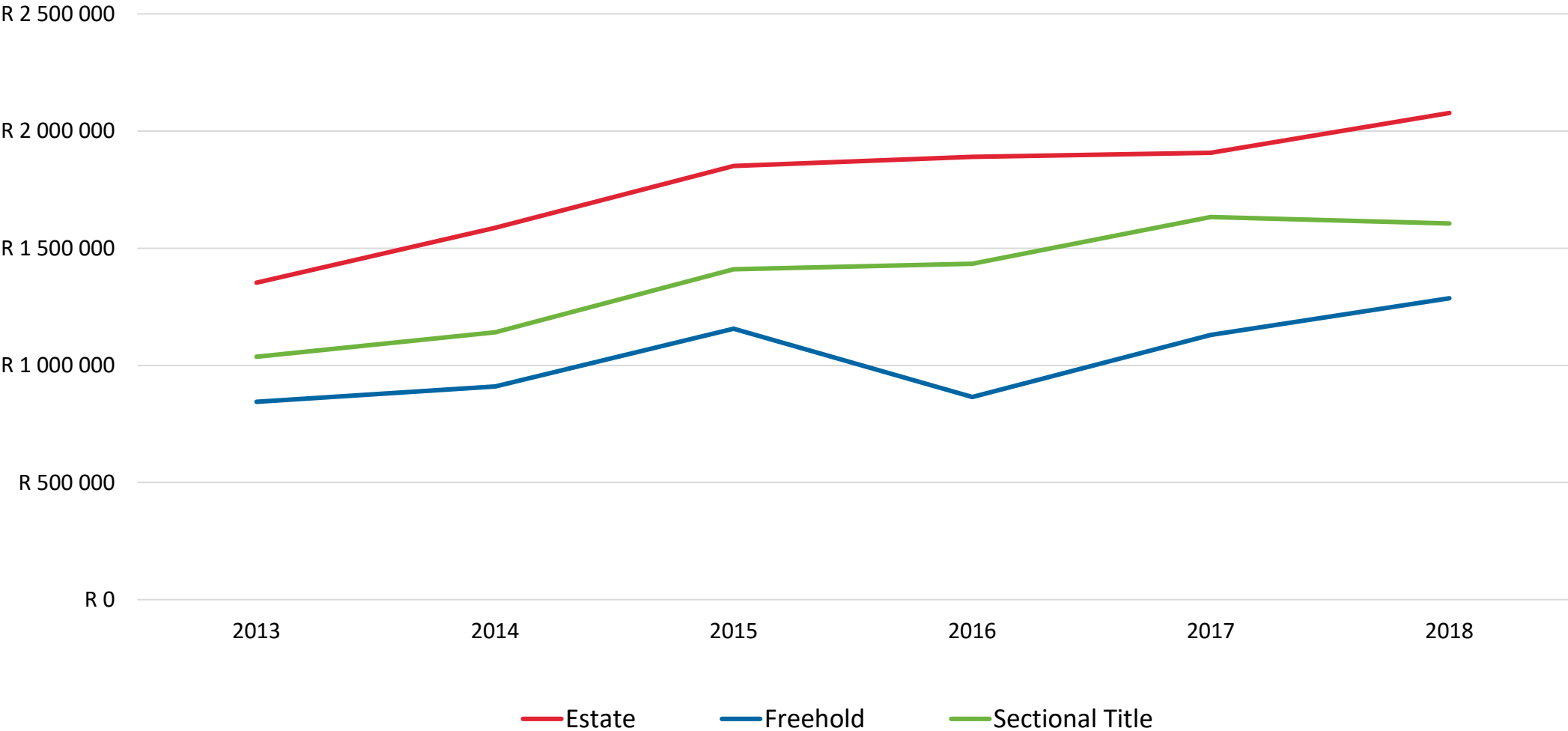
House price growth Western Cape



Property transfer activity

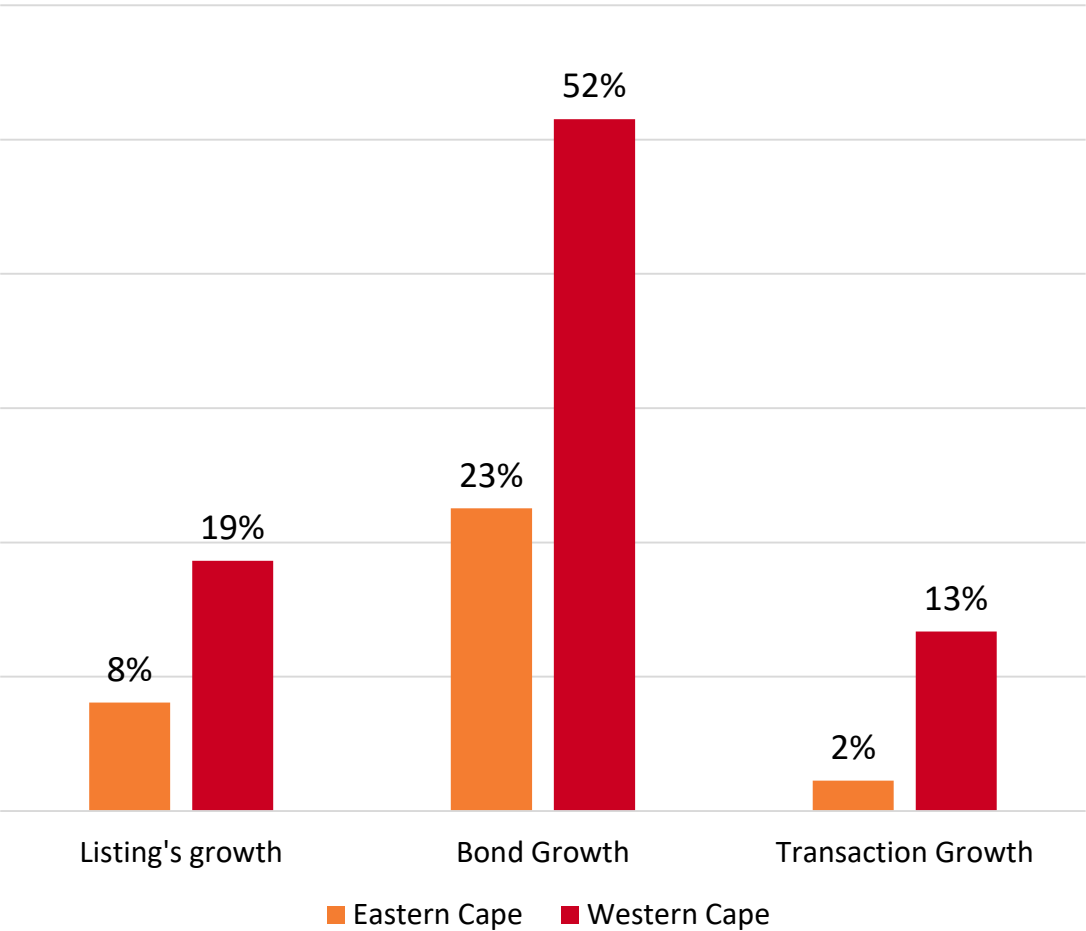


January sales average purchase price in Western Cape

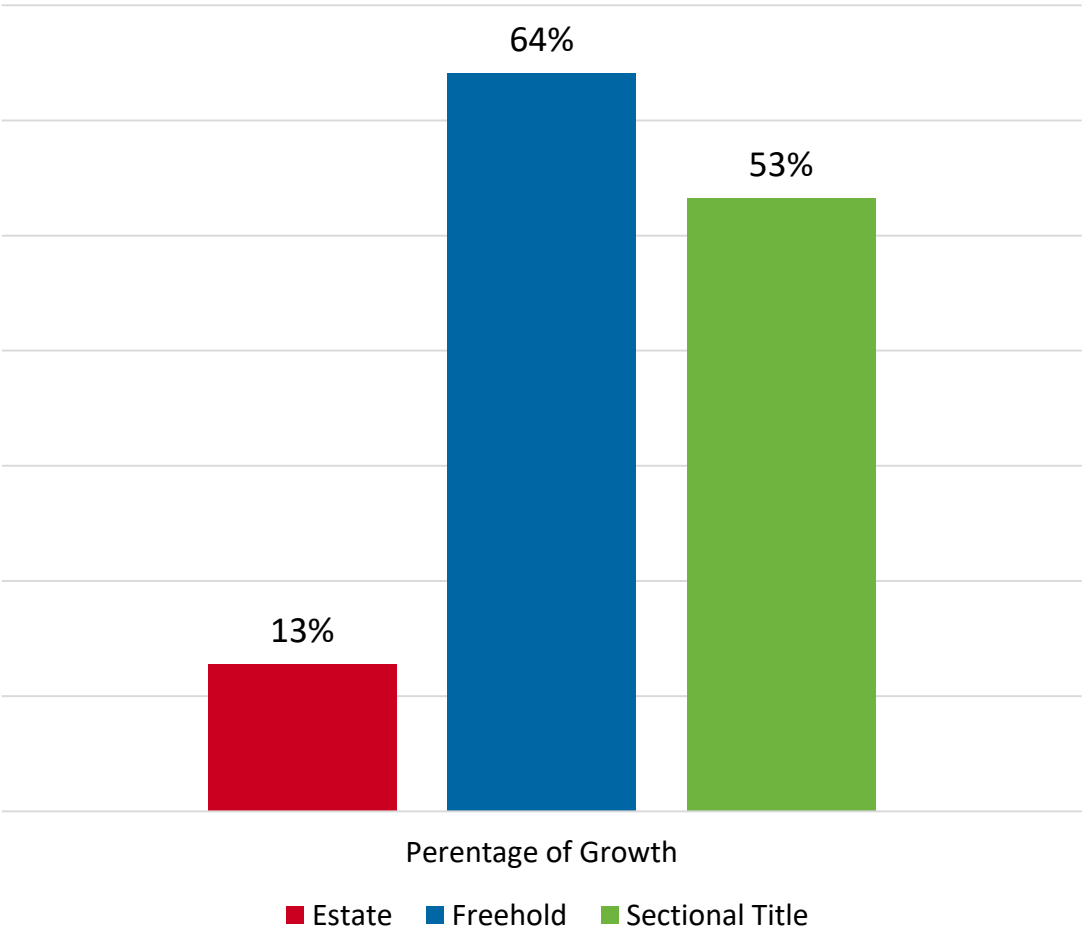


Western Cape water crisis and the property market

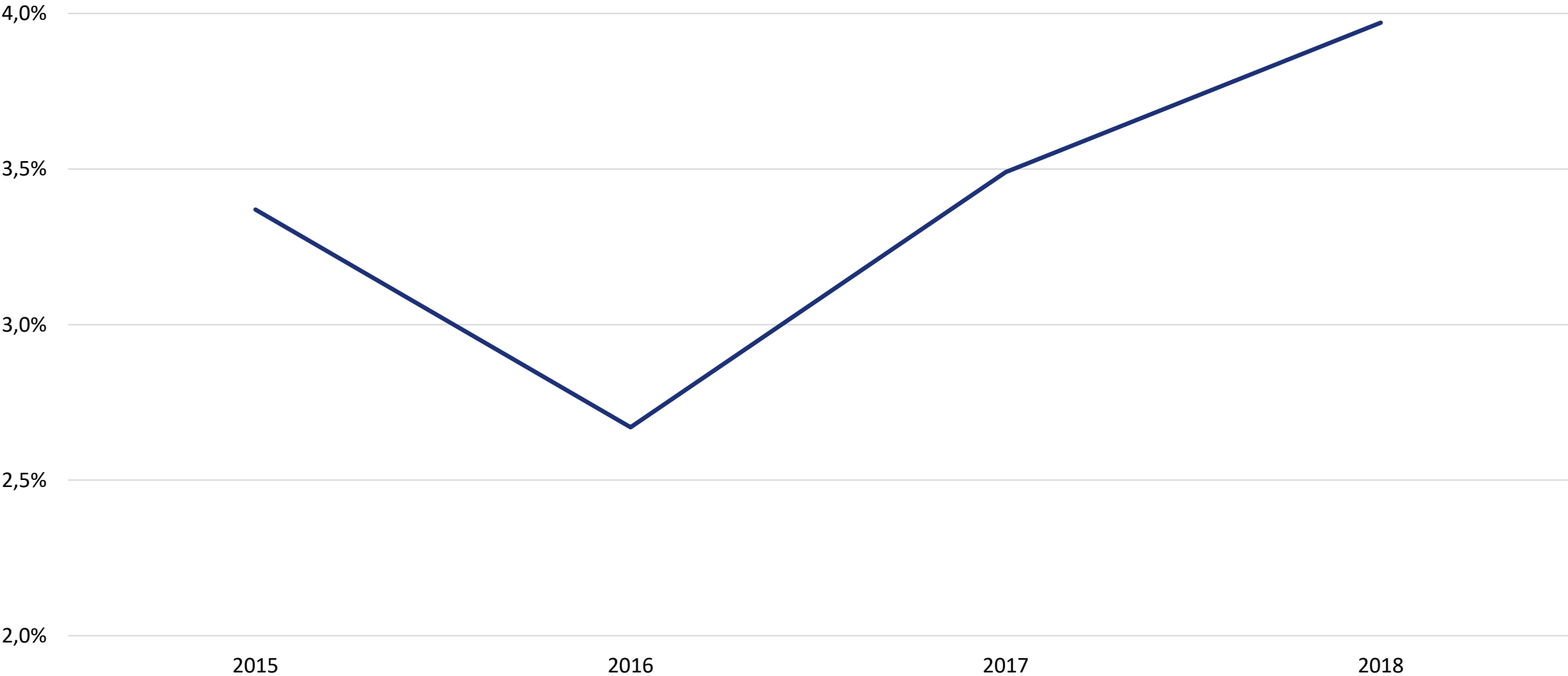
Activity growth from January 2017 to 2018



Bonded activity growth



Percentage of Foreign Investments in Property *(January year-on-year)*



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Most expensive streets and suburbs in Western Cape

Top suburbs – average value

R 17.1m

Bishops court,
Cape Town

R 15.7m

Llandudno,
Cape Town

R 13.1m

Constantia Heights,
Cape Town

R 12.3m

Clifton,
Cape Town

R 12.2m

Steenberg Golf Estate,
Cape Town

R 12.2m

De Bosch,
Stellenbosch

Top streets – average value

R 25.9m

Nettleton Road,
Clifton

R 25.4m

Hillwood Avenue,
Bishops court

R 24.1m

Steenways Road,
Llandudno

R 23.7m

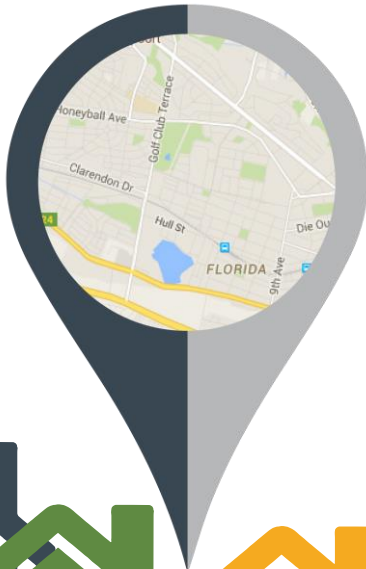
Torquay Avenue,
Bishops court

R 23.3m

Glen Beach Road,
Camps Bay

R 22.6m

Upper Primrose Avenue,
Bishops court



Top 10 high growth suburbs over 2018

Suburb name	House price inflation
Robberg Ridge	20%
Southern Cross	19%
The Island	16%
Raithby	14%
Clara Anna Fontein	12%
Mount Pleasant	12%
Paardevelei	12%
Welcome Glen	12%
Jamestown	12%
Stanford	11%

Most expensive and high growth estates in Western Cape

Median property value

R 16.2m

High Steenberg,
Cape Town

R 15.8m

Silverhurst Estate,
Cape Town

R 14.8m

Riversong,
Cape Town

R 14.4m

Silversteen Estate,
Cape Town

R 14.4m

Whale Rock Beach,
Plettenberg Bay

R 13.8m

Warblers Grove,
Cape Town

House price growth

21%

*Nottinghill,
Parklands*

14%

*The Anchorage,
Muizenberg*

13%

*Rocheft Village,
Pinehurst*

13%

*St Johns Wood Country Village,
Durbanville Central*

13%

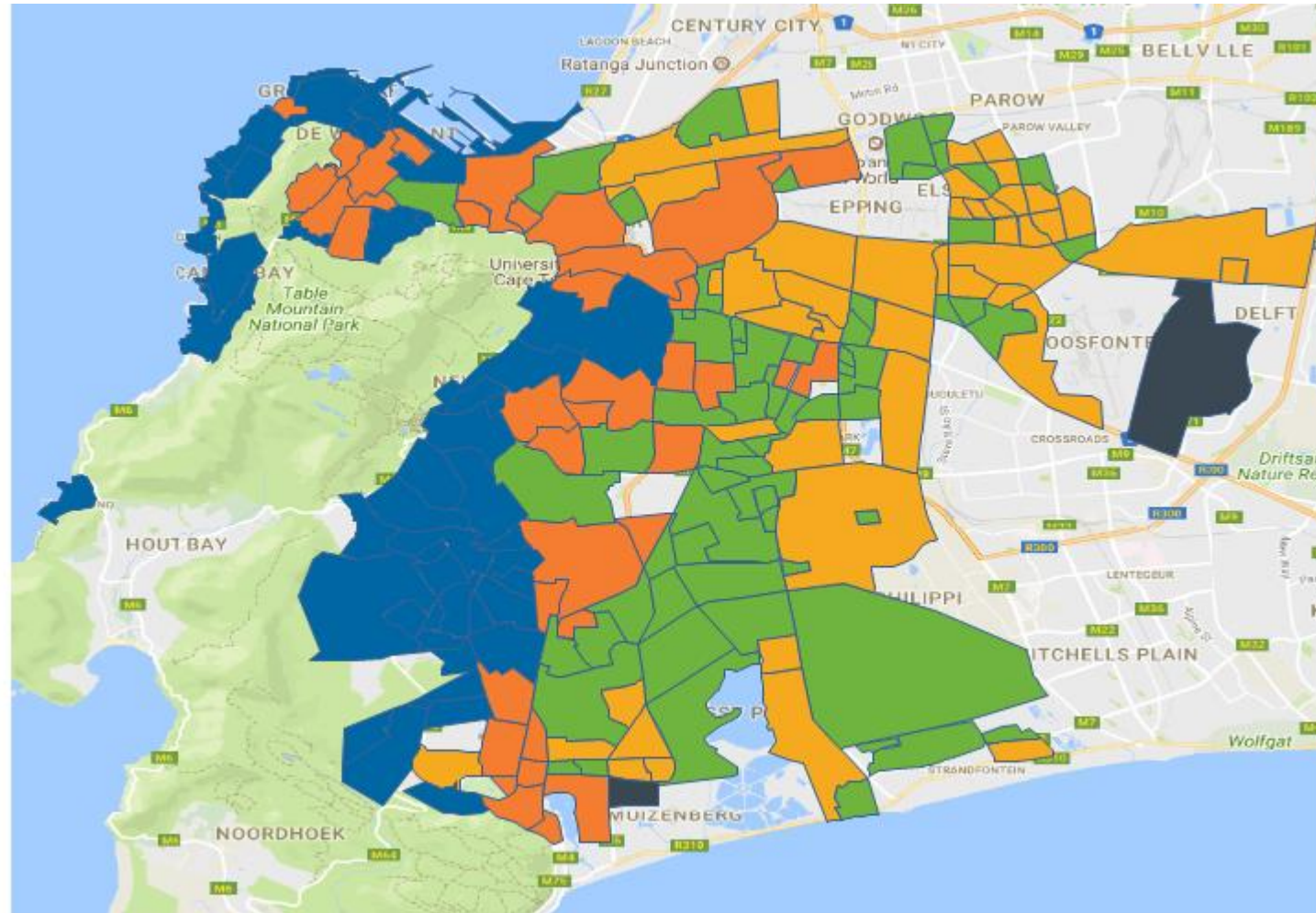
*Sultana Select,
Uitzicht*

12%

*Estoril,
Rugby*



Cape Town median property value



- Less than R250k
- R250k – R700k
- R700k – R 1.5m
- R1.5m – R3m
- More than R3m

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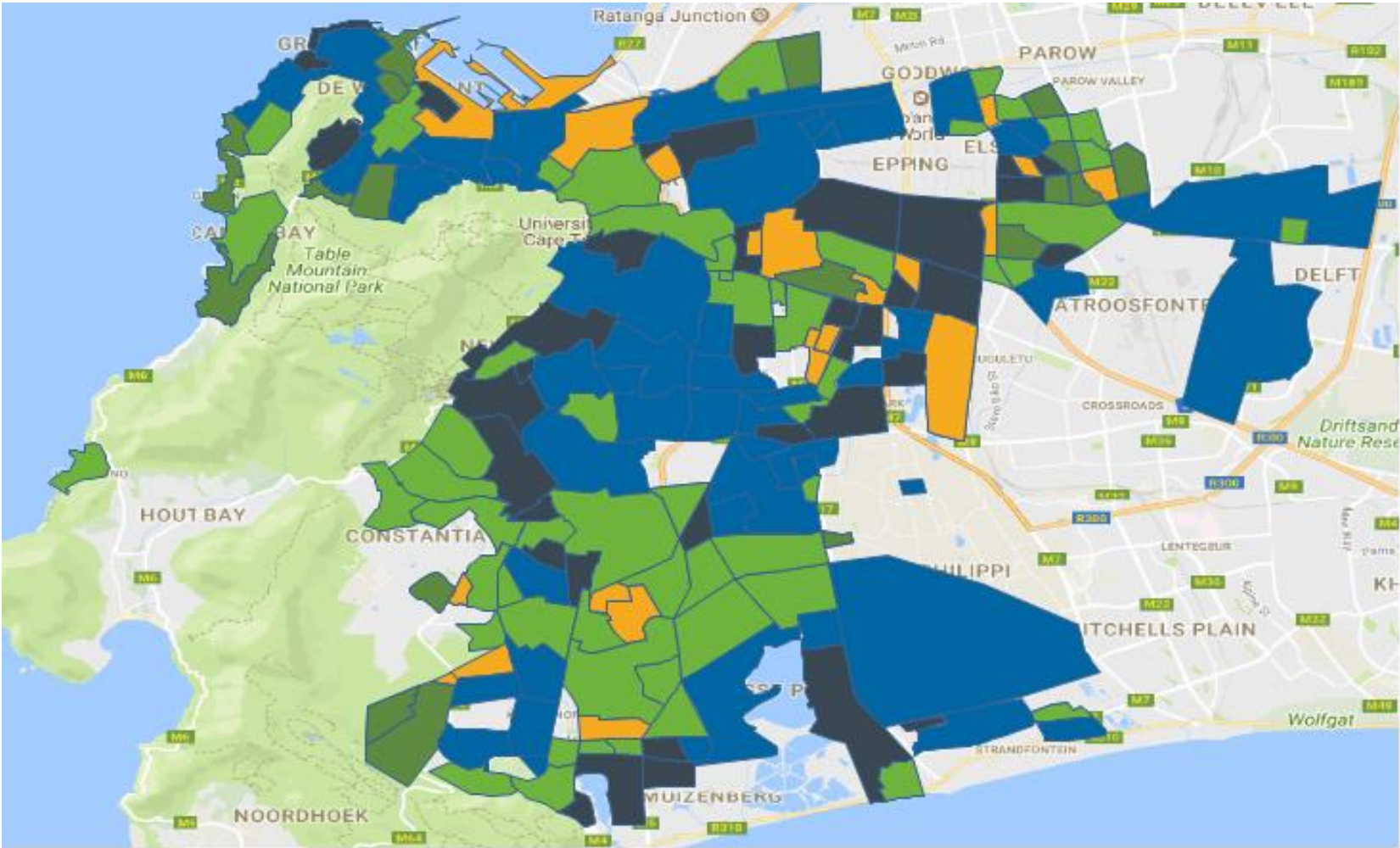
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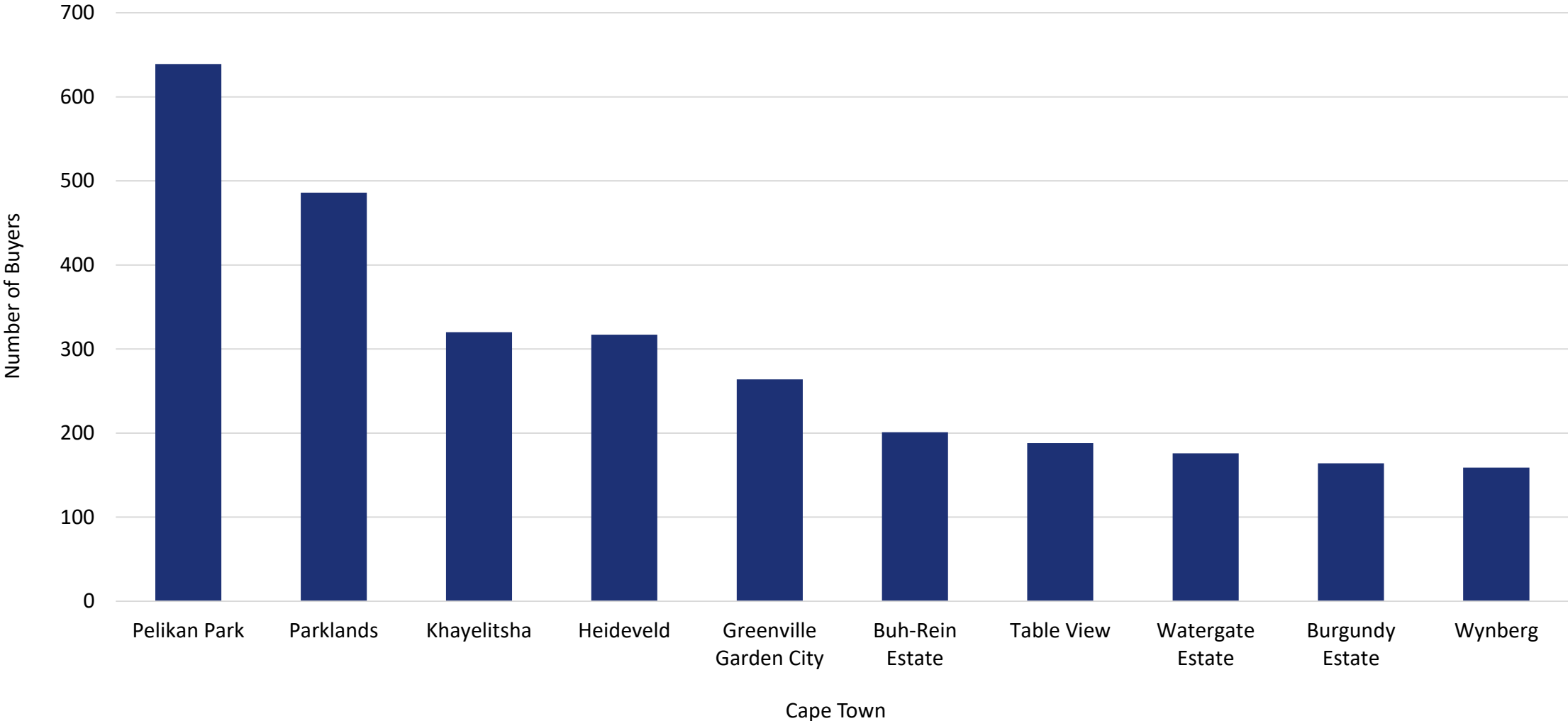
Information available to property buyers

Buyer age for properties purchased (last 12 months)



- 18 - 25
- 23 - 35
- 35 - 45
- 45 - 55
- 55 - 65
- 65 - Older

Top 10 suburbs with the highest number of first time buyers



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