



the new Rouse Hill

PROPERTY FACTSHEET

ROUSE HILL – THE HILLS SHIRE
1st HALF 2016



ABOUT

The New Rouse Hill master planned community is situated within The Hills Shire, located approximately 40km northwest of the Sydney Central Business District. Upon completion, this 122 hectare community will become home to approximately 4,500 residents and will provide 32 hectares of open space, a community pavilion, retail and lifestyle precincts and walking and cycling trails.

Residents of The New Rouse Hill will have easy access to the M2 Motorway and public transport options, providing connectivity to the Sydney CBD and surrounding areas. When complete, there will be three additional schools in the immediate area, along with numerous schools in surrounding suburbs.

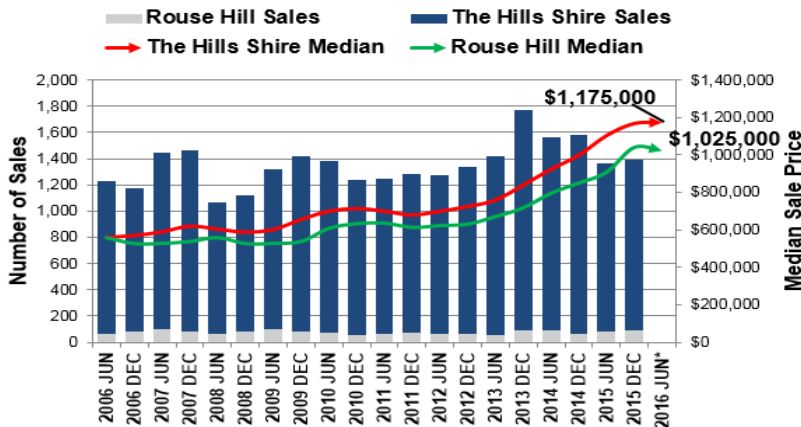
This master planned community will also incorporate Mungerie Paddock, which will stretch across 7,500m² of green open space. Mungerie Paddock will also consist of a wetlands area as part of The New Rouse Hill's Water Sensitive Urban Design program.

MARKET SUMMARY

The Rouse Hill property market has shown consistent price growth over the past five years, with the market stabilising in early 2016. Positive growth for house sales is evident at 12.6%, however this is at a slightly slower pace than in mid-late 2015; possibly due to uncertainties in the market for investors. The same pattern can be seen for the Hills Shire LGA, which indicates increased levels of affordability for home buyers. That said the Rouse Hill house market is still performing above the Sydney Metro market (10.5% price growth during the same time frame), suggesting higher investment opportunities.

The Rouse Hill land market has trended positively over the past three years and it continues to perform, with early 2016 recording peak prices and growth of 18.4%. The Hills Shire LGA land market is also showing positive trends, at 12.4% annual growth. Rouse Hill's land market growth is above Sydney Metro's (15.2%), whilst The Hills Shire LGA land market growth is on par; suggesting overall the area provides positive returns to investors.

10 YEAR HOUSE SALES CYCLE



*Note: 2016 and 2016 JUN data captures pricing of property sales up to and inclusive of 31st March 2016 or end of Q1 2016. Sales volume has not been included in the Sales Cycle graph due to incomplete half-yearly results
Source: APM PriceFinder, The Hills Shire Council, Real Estate Institute of New South Wales



KEY MARKET INDICATORS

Change from Last	Year	Half Year
House sales	↓	↓
House median	↑	↔
House rents	↑	↑
Land sales	↓	↓
Land median	↑	↑
Unit rents	↓	↓

KEY HIGHLIGHTS

Median house prices in Rouse Hill currently sit at \$1,025,000, while median vacant land prices sit at \$523,307. This represents an annual growth of 12.6% and 18.4% respectively.

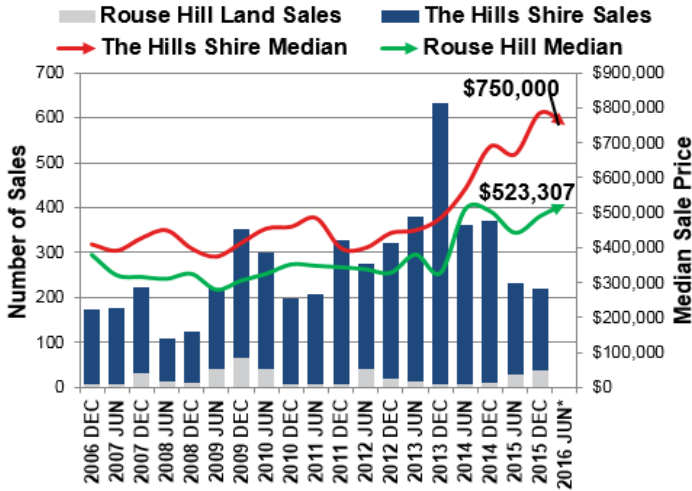
Year on year capital growth for house sales in The Hills Shire LGA grew by 6.3% to \$1,175,000 in 2016*, whereas land sales grew by 12.4% to \$750,000.

The Rouse Hill rental market is promising, with median rent figures for houses increasing over the 2015-2016* period. House rental yield sits at 3.6%, higher than Sydney Metro's 3.2%.

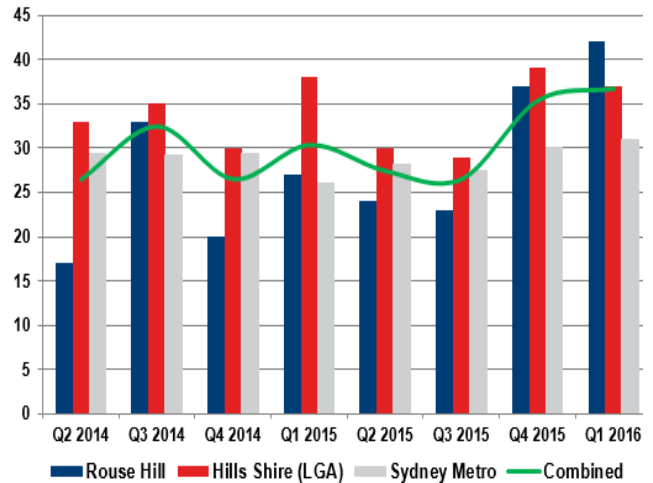
High levels of commercial projects due to commence construction in 2016 will ensure the Hills Shire area becoming a more active economic hub; which will further increase the value of property investment.

"In 2016 Rouse Hill house and land market growth, at 12.6% and 18.4%, outperformed Sydney Metro area growth of 10.5% (house) and 15.2% (land)"

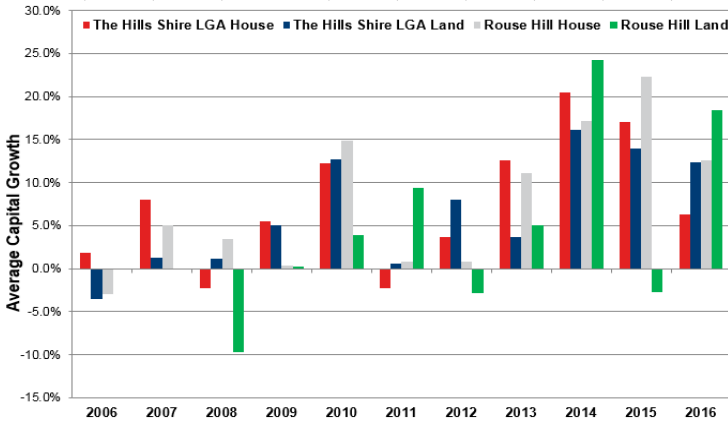
10 YEAR LAND SALES CYCLE*



HOUSE AVERAGE DAY ON MARKET

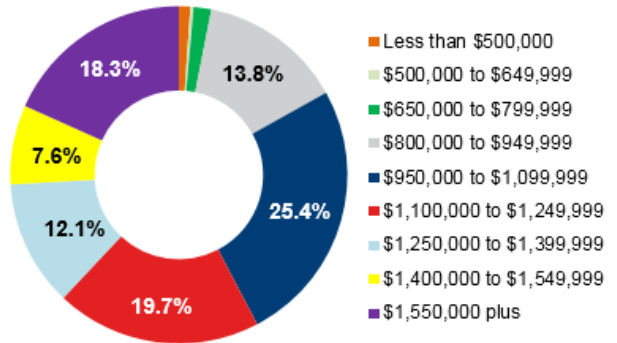


YEAR ON YEAR GROWTH*

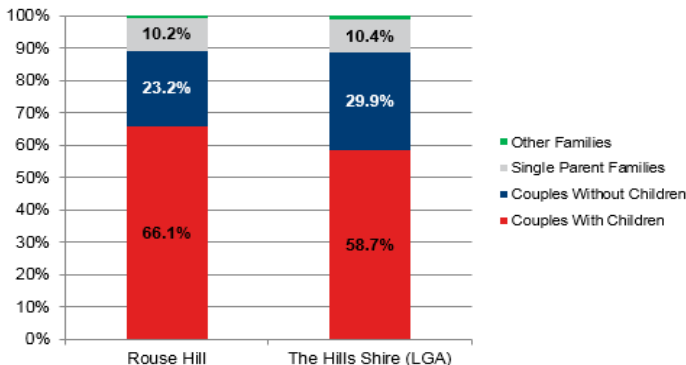


HOUSE PRICE POINTS

The Hills Shire LGA



HOUSEHOLD COMPOSITION



KEY IMPLICATIONS

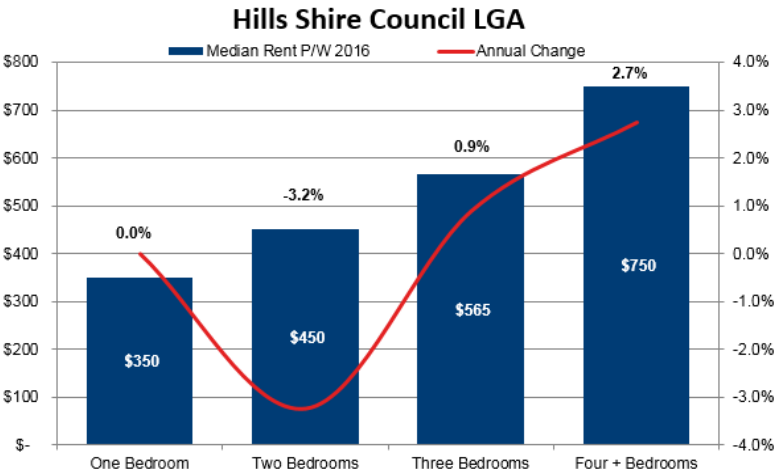
Average day on market for houses in The Hills Shire LGA has declined by 2.6% over the twelve months to Q1 2016. This is in contrast with the Sydney Metro area, which increased by 19.2% within the same time frame. Although average day on market for houses in Rouse Hill has increased slightly, this indicates that the overall area is attractive and highly in-demand.

House prices in The Hills Shire grew by 6.3% in 2015-2016, whereas land prices grew by 12.4%; further signaling a strong property market. Historical low interested rates is expected to keep buyer activity buoyant and drive further price growth in the future.

*Note: 2016 JUN data captures pricing of land sales up to and inclusive of 31st March 2016. Sales volume has not been included in the graph due to incomplete half-yearly results
Source: Australian Bureau of Statistics, APM PriceFinder, Cordell Database, CoreLogic RPdata, New South Wales Department of Planning and Environment

"4 bedroom houses provide the highest return, with 2.7% annual rental growth"

INVESTMENT ANALYSIS ANNUAL RENTAL PERFORMANCE*



KEY COMMENTS

Rental growth in Rouse Hill is strong, with houses indicating a yield of 3.6%, above Sydney Metro's 3.2%. The Hills Shire LGA rental yields are at 3.3% (house) and 4.4% (units), also above that of Sydney Metro.

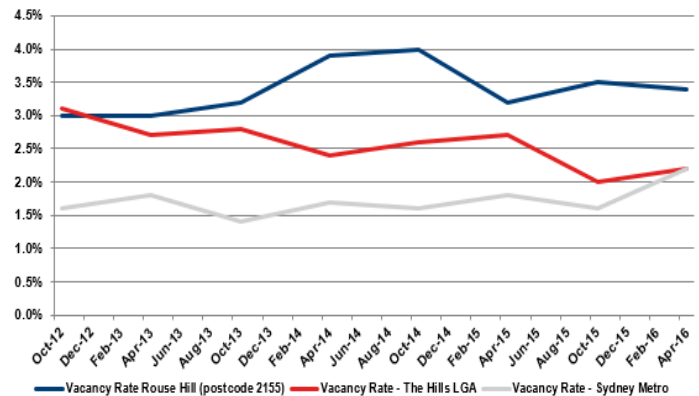
4+ Bedroom houses provide the highest rental growth at 2.7%, with median rent sitting at \$750 per week.

The Hills Shire vacancy rate sits on par with the Sydney Metro at 2.2%, showing a slightly increasing trend. Rouse Hill vacancy rate is higher than Sydney Metro at 3.4%, however is on a declining trend, opposite to Sydney Metro's increasing trend. A declining trend in vacancy rates indicate a stronger and more active rental market, which will foster a positive environment to achieve high investment returns.

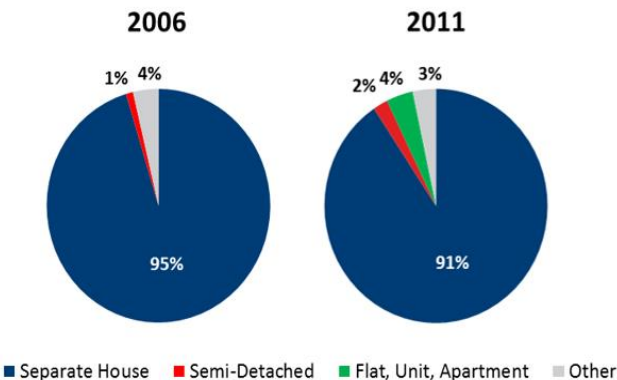
RENTAL YIELD 2016

Suburb/ Postcode/ LGA	House Rental Yield	Unit Rental Yield	Average Rental Yield
Rouse Hill	3.6%	4.5%	4.1%
Postcode 2155	3.5%	4.3%	3.9%
The Hills Shire (LGA)	3.3%	4.4%	3.9%
Sydney Metro	3.2%	4.0%	3.6%

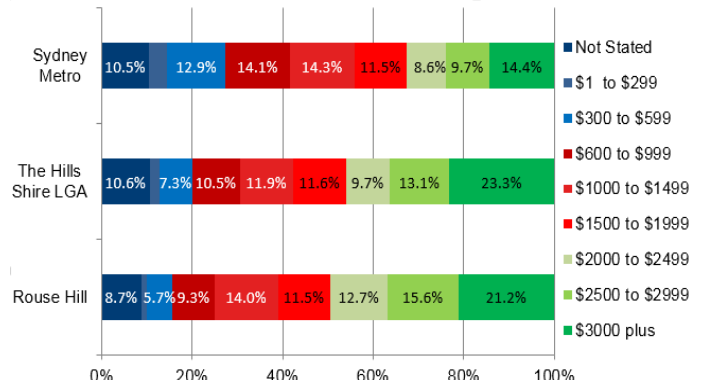
VACANCY RATES



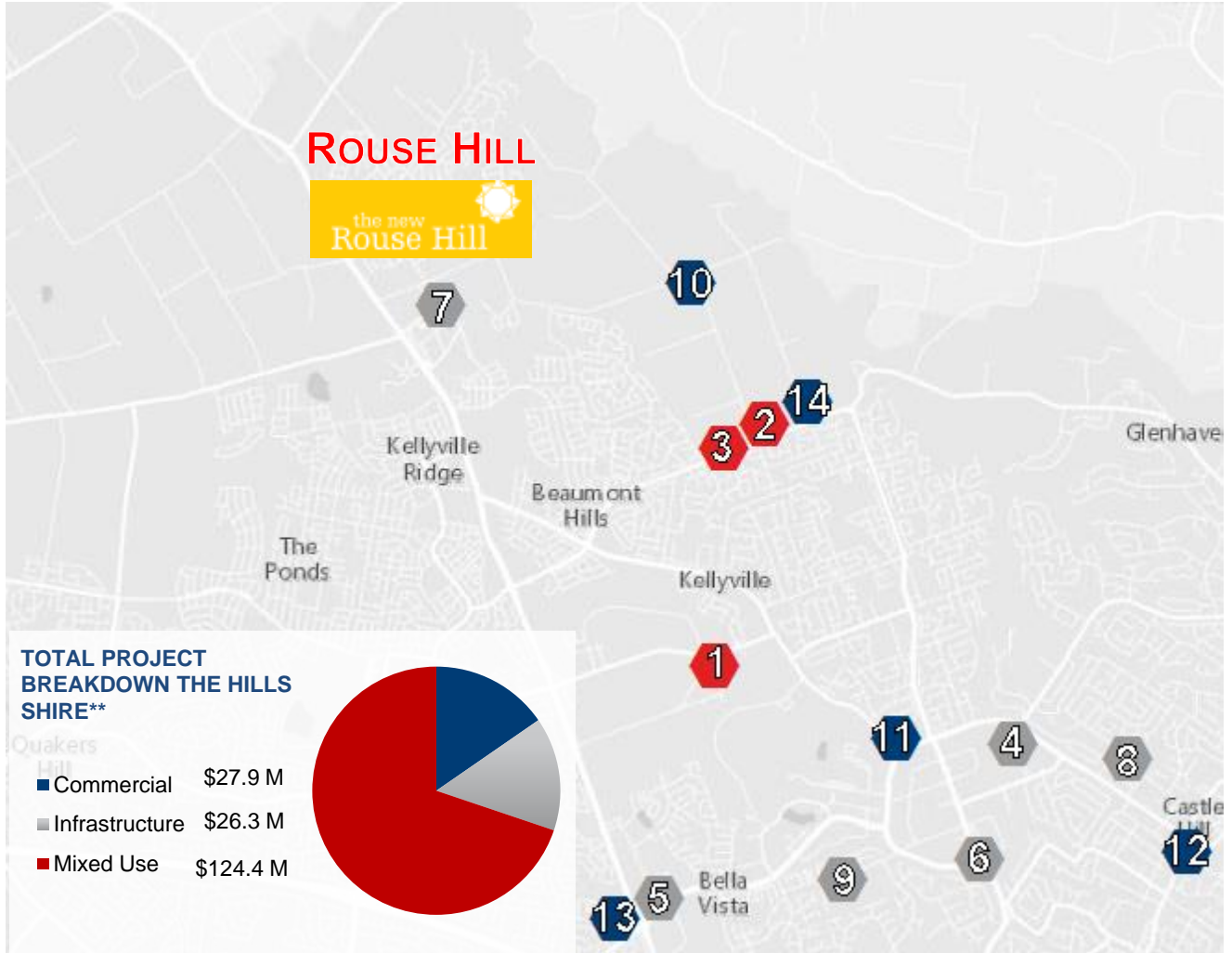
DWELLING TYPE CHANGE



MEDIAN INCOME COMPARISON



PROJECT DEVELOPMENT MAP 2016*



Location	Project Title	Type	Estimated Value***	Commence Date
1	Hector Court Local Centre	Mixed Use	\$4,380,000	23/03/2016
2	Hezlett Rd Mixed Development - Starkelly	Mixed Use	\$10,000,000	21/03/2016
3	The North Village - Mixed Use Development	Mixed Use	\$110,000,000	18/01/2016
4	Showground Road - Upgrade	Infrastructure	\$21,000,000	02/05/2016
5	Bulky Goods Development - Former Bunnings Norwest	Infrastructure	\$1,000,000	06/06/2016
6	Victoria Av Bulky Goods & Cafe	Infrastructure	\$1,320,000	22/02/2016
7	Rouse Hill Public Realm Embellishment Works	Infrastructure	\$1,300,000	01/02/2016
8	Castle Hill Rsl	Infrastructure	\$1,200,000	21/04/2016
9	Barrina Downs Rd Stormwater Detention Facility	Infrastructure	\$528,000	29/03/2016
10	Woolworths Retail Development Kellyville	Commercial	\$18,000,000	21/03/2016
11	Powerhouse Museum - Building I	Commercial	\$485,000	01/03/2016
12	Spidar Kumo Den	Commercial	\$250,000	15/02/2016
13	Strongbuild	Commercial	\$650,000	14/03/2016
14	Australian International Academy	Commercial	\$8,000,000	27/06/2016

*Disclaimer: Project development map showcases a sample of 2016 commencing construction projects. This is due to limited space available and accuracy of addresses provided by the data provider for geocoding purposes. For a full list of project development please contact PRDnationwide research

**Total Project Breakdown Chart includes all projects in the The Hills Shire Council LGA commencing in 2016 regardless of the current stage in the development process

***Estimated value refers to construction and/or land value as reported by relevant data authority and does not represent commercial/re-sale value

Source: Cordell Database, NSW Department of Planning and Environment, PRDnationwide, ESRI, DeLorme, HERE, The Hills Shire Council

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