

NEIGHBOURHOOD REPORT

# SAMPLE.

2024 ANNUAL

PREPARED FOR:

**REID**

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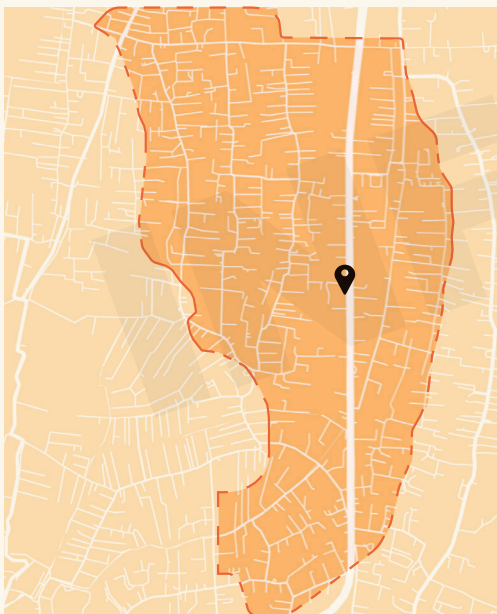
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Sample Location  
Regency,  
Bali

**INTRODUCTION**

As one of the more mature neighborhoods across Bali, Sanur has a wealth of amenity offerings, catering to a wide variety of groups from families and expats, to tourists and locals. Being located centrally in the south-east of the island and adjacent to Central Badung (above Bukit), enables easy access to most of Bali.

Sanur provides a well balanced range of amenities, offering a variety of social, public facilities and wellness, coupled with consistent tourism to the area, for both locals and visitors. Additional to this, notable amenities coming online like the Bali International Hospital and Icon Bali Mall, boost Sanur’s prominence and provide compelling value to the region.



**SUPPLY GROWTH**



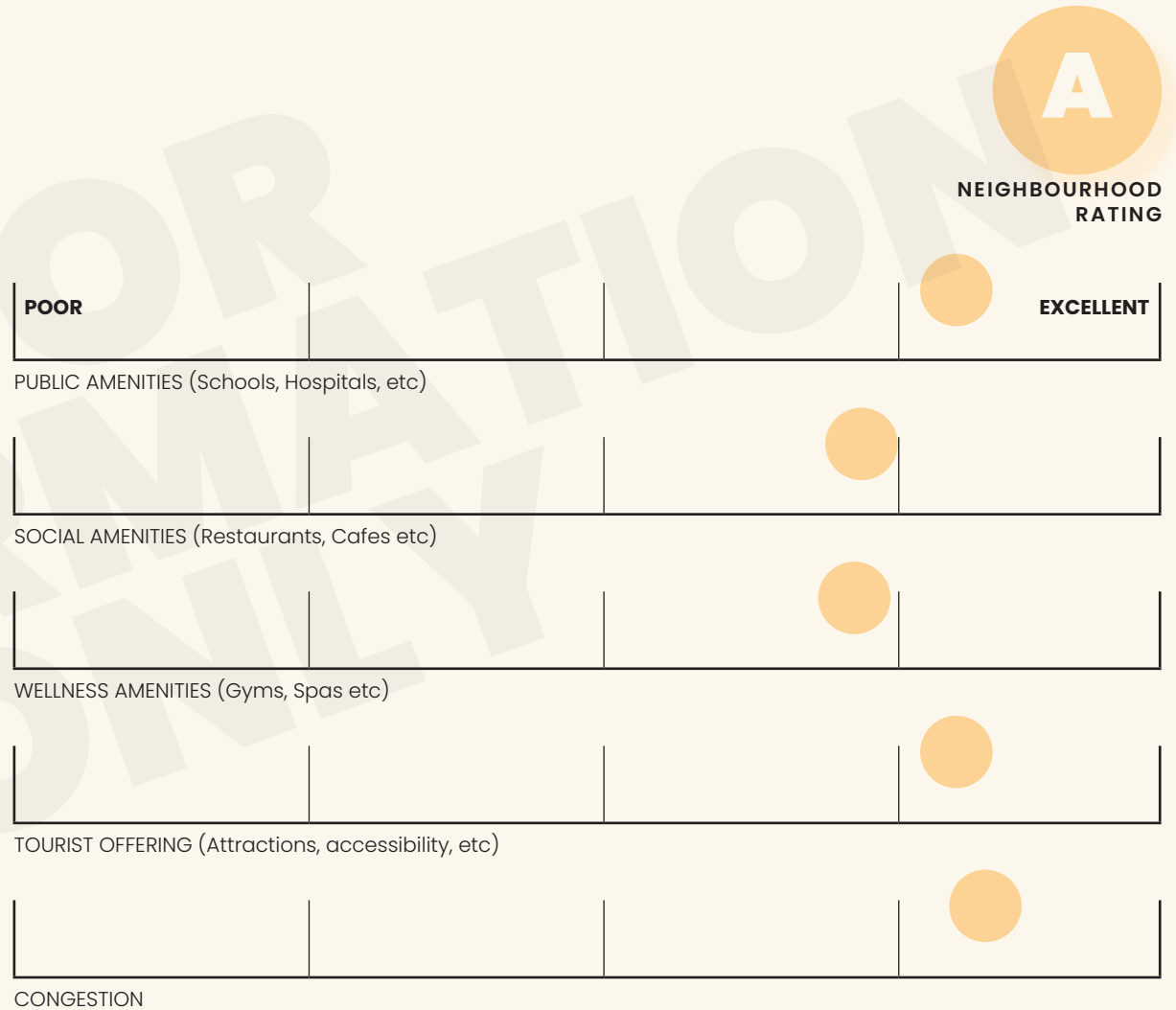
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**NEIGHBOURHOOD PROFILE**

Sanur provides a well balanced range of amenities, offering a variety of social, public facilities and wellness, coupled with consistent tourism to the area, for both locals and visitors. Additional to this, notable amenities coming online like the Bali International Hospital and Icon Bali Mall, boost Sanur’s prominence and provide compelling value to the region.

Unlike other neighborhoods of Bali, congestion within Sanur is rated significantly higher due to less traffic jams and transportation delays. Overall, Sanur is a neighborhood that is well positioned and has a lot to offer both short term and long term residents and rates highly as such, with a top of market A rating.



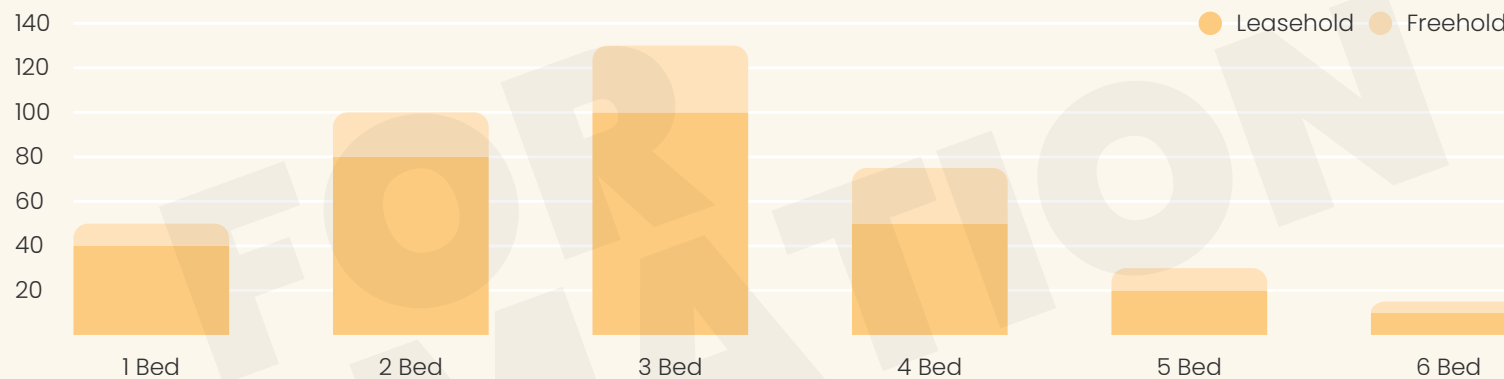
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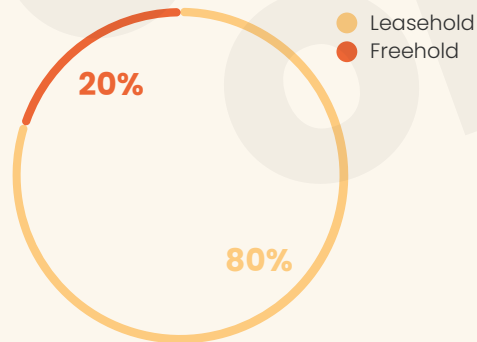
**MARKET SUPPLY**

- Property supply has experienced steady supply growth over the previous 4 quarters, with an average growth of 4.7% month on month.
- Sales within Sanur experienced relatively major peaks and troughs month on month and remained flat in terms of growth across 12 months.
- The influx in new properties and variance in sales volume from July 2023 to June 2024, could be accounted for by real estate seasonality and the result of post-covid development injection.

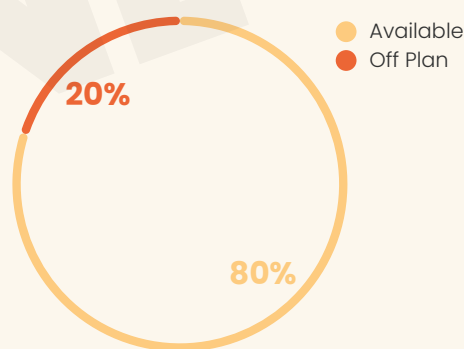
**AVAILABLE SUPPLY**



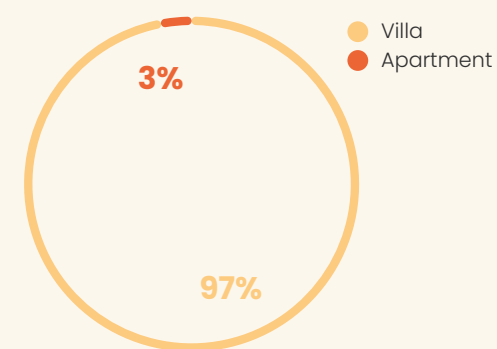
**OWNERSHIP TYPE**



**DEVELOPMENT STATUS**



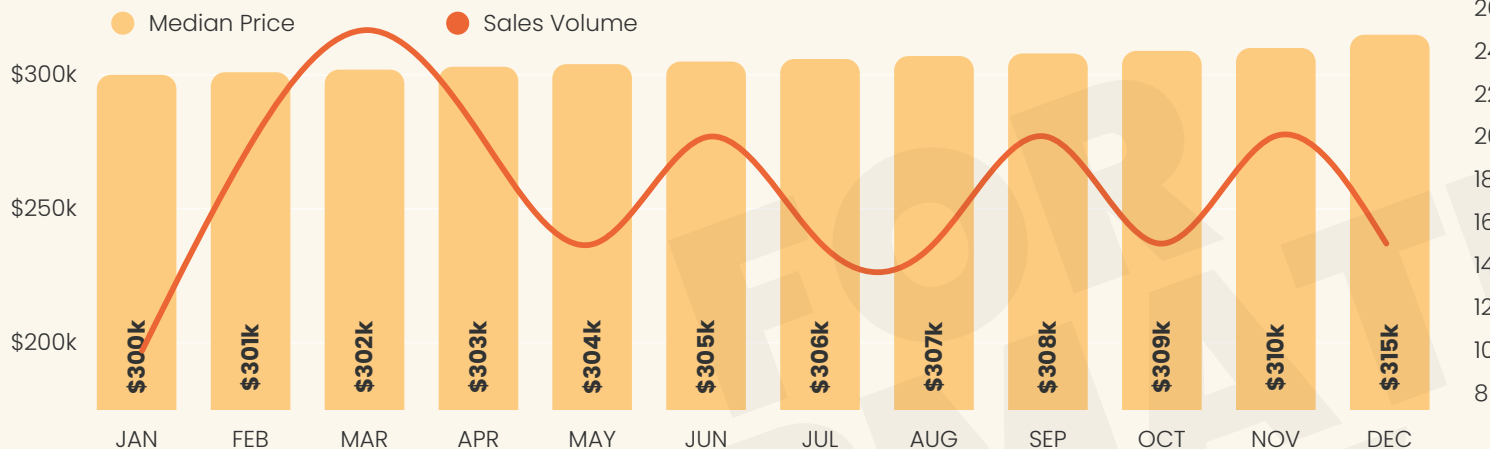
**PROPERTY TYPE**



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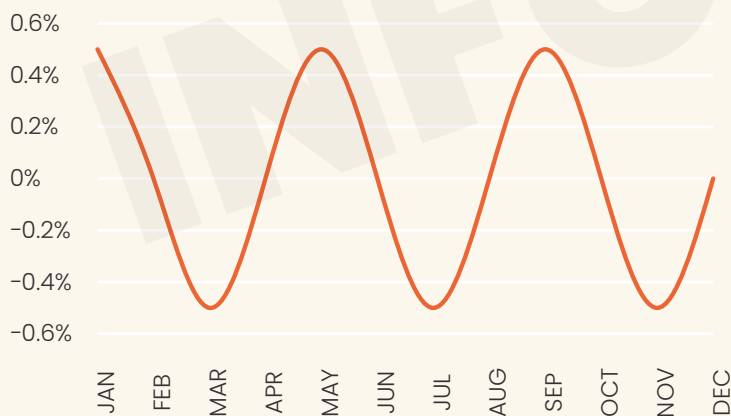
**MEDIAN SALE PRICE & SALES VOLUME**



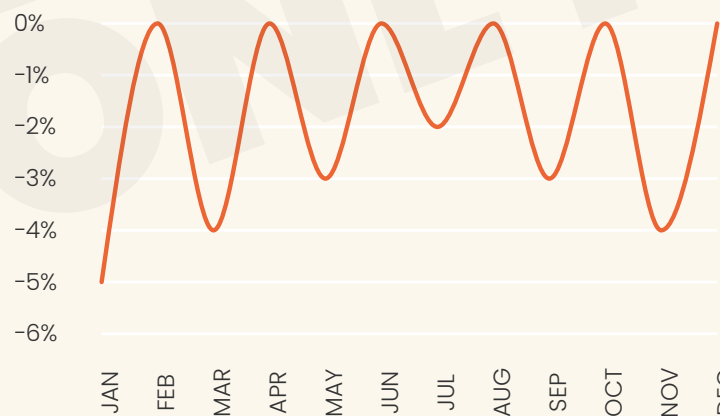
**PRICING TRENDS**

- Properties in Sanur, primarily sit in the \$100k - \$600k price range with over 50% of available properties placed within this price band.
- Properties below the 4 bedroom category, increase steadily, while price variances for 4+ bedrooms range considerably.
- The Sanur median listing price sits 5% above the market median listing price of \$360k.
- Interestingly the 5 & 6 bedroom categories both sit above the \$1M mark, which can be attributed to the majority of these categories being freehold assets.

**PRICE CHANGE**



**DISCOUNT RATE**



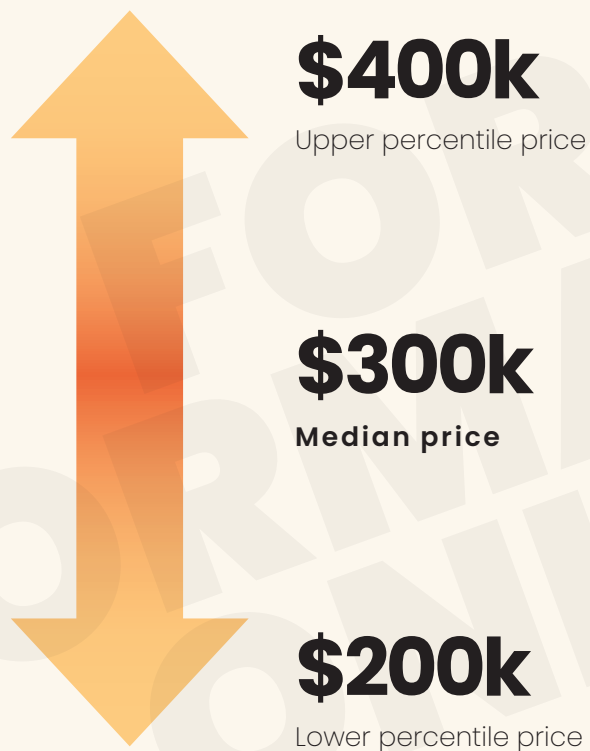
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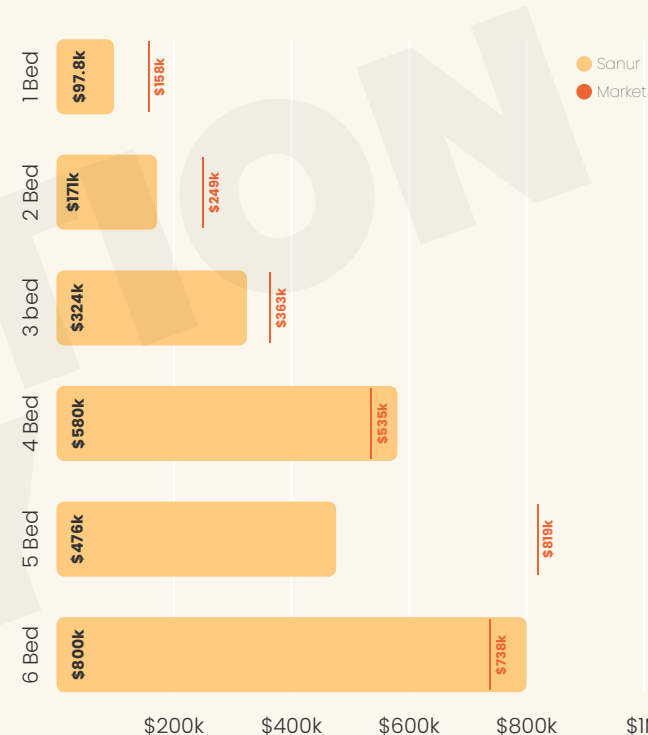
**PRICING TRENDS**

- Looking at the sale price distribution (orange lines) in comparison to the listing price distribution, Sanur varies considerably. The distribution of sale prices is more diverse and spread out sitting between \$100K to \$800K, and spikes again after \$1M. Between the \$200 - \$300K price range, the inverse relationship is held between listing and sales.
- Uniquely, from 4 bedrooms plus, median sale prices are higher than the median list price, indicating demand or low supply in these categories. This may also be due to lower transaction volumes in this category.

**MEDIAN PRICE DISTRIBUTION**



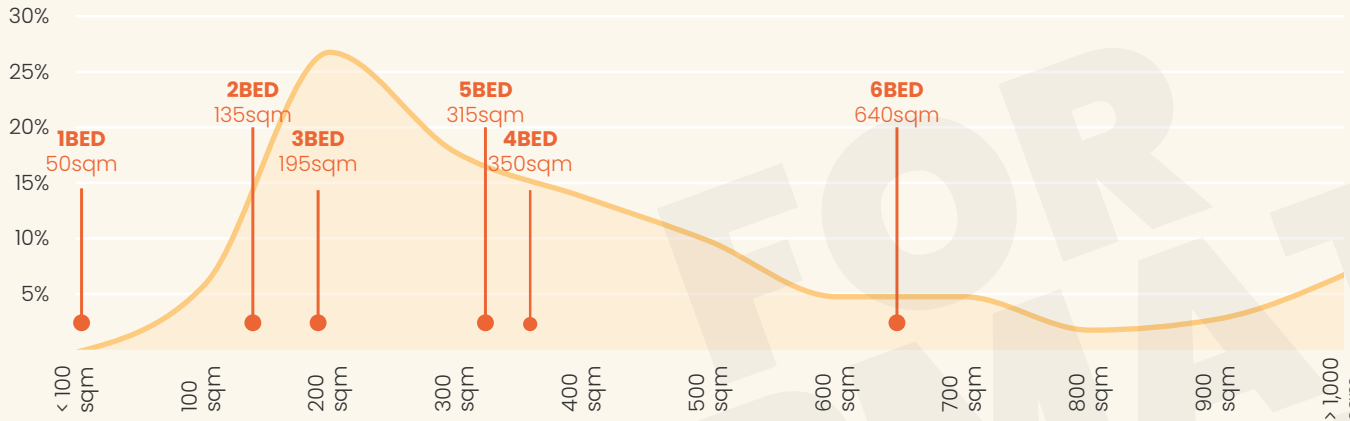
**MEDIAN BEDROOM PRICE**



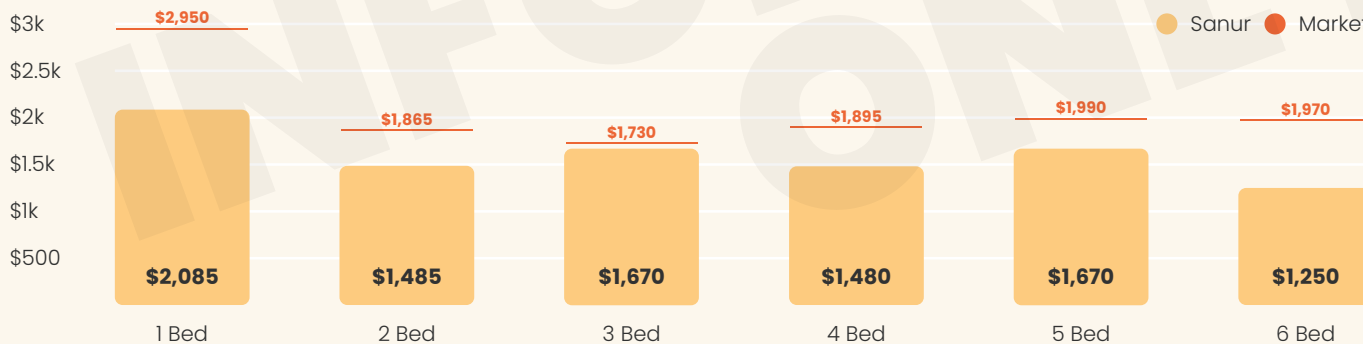
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**PROPERTY SIZE DISTRIBUTION**



**PRICE PER SQM BY BEDROOM**



**PROPERTY SIZE**

- 57% of Sanur' properties sit between 100 - 300 sqm, whilst the median size sits at 250sqm.
- Generally speaking, properties in Sanur tend to be larger in size than the rest of the market, with the median size being 19% greater than the Bali market median.
- Sanur bedroom categories cluster between \$1,400 - \$2,400 with regards to price per sqm, suggesting a relatively even spread of value across property categories.
- Sanur' median price per sqm is 13% less than the Bali market rate, suggesting a better value for price offering.

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**LEASE DISTRIBUTION**



**PRICE PER YEAR BY BEDROOM**



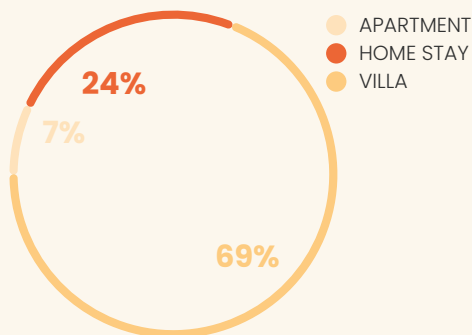
**LEASE TERM**

- Similar to the price per square meter, price per year also indicates value, where naturally larger properties incur greater price per year metrics. Interestingly however, 6+ bedroom properties are significantly more expensive than all the bedroom categories per year.
- As a whole, Sanur properties are slightly more expensive per year, suggesting shorter available lease terms than the rest of the market.

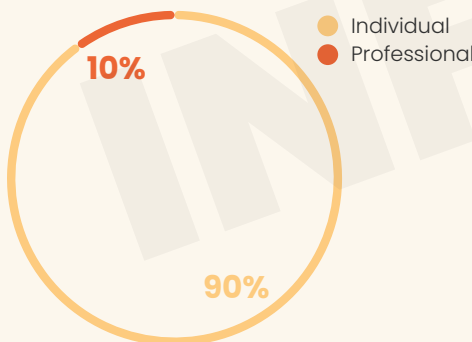
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**RENTAL MARKET BREAK DOWN**



**MANAGEMENT TYPE**



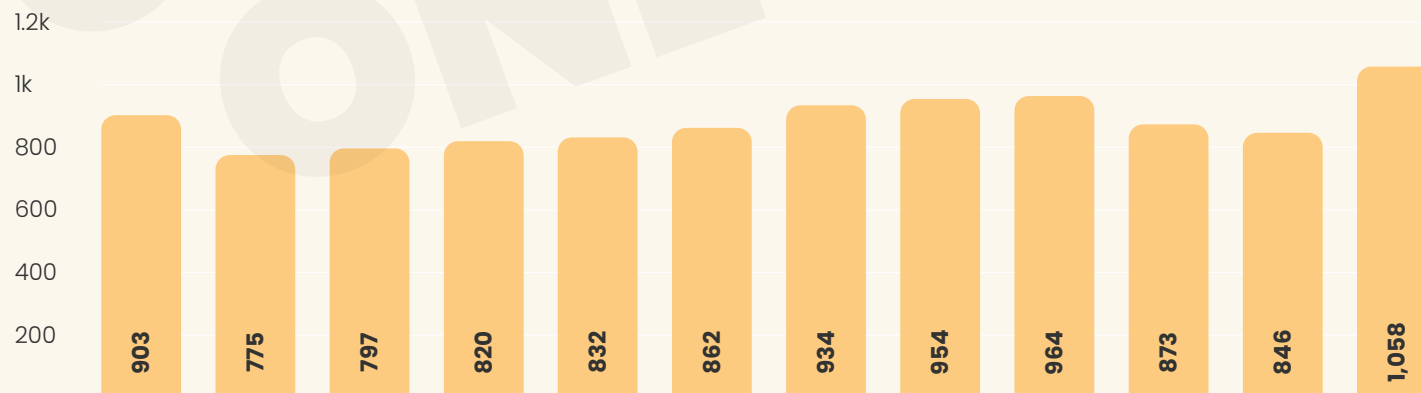
**RENTAL PERFORMANCE**

Sanur’s rental supply grew by a measured 17 percent in 2024, a modest increase in a year where some Bali regions saw inventory balloon well beyond demand. While growth here has been limited, it appears intentional. The pace of supply suggests a market more focused on preserving yield than chasing expansion.

One-bedroom properties dominate Sanur’s rental mix, accounting for nearly half of all listings. This skew toward compact formats contrasts sharply with the for-sale market, where three-bedroom homes are far more prevalent and one-bedrooms represent just 2 percent of supply.

Despite the narrow inventory base, Sanur’s rental performance is one of the strongest on the island. Average occupancy rates reach 62 percent, outpacing the Bali-wide average of 55 percent. This suggests a steady stream of tenant demand that isn’t being driven by short-term hype or speculative listings.

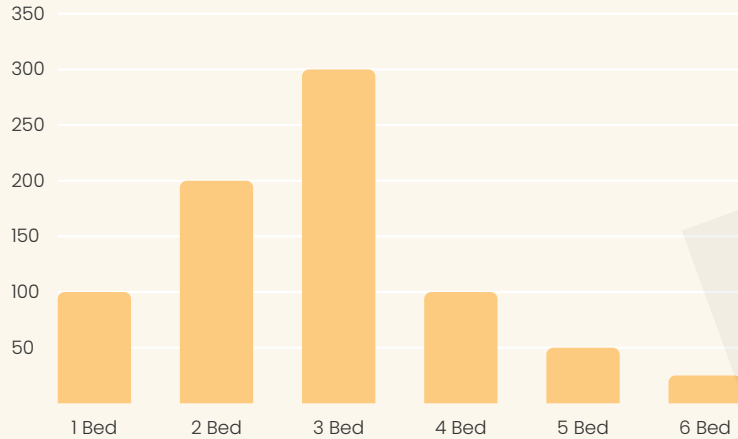
**SUPPLY GROWTH**



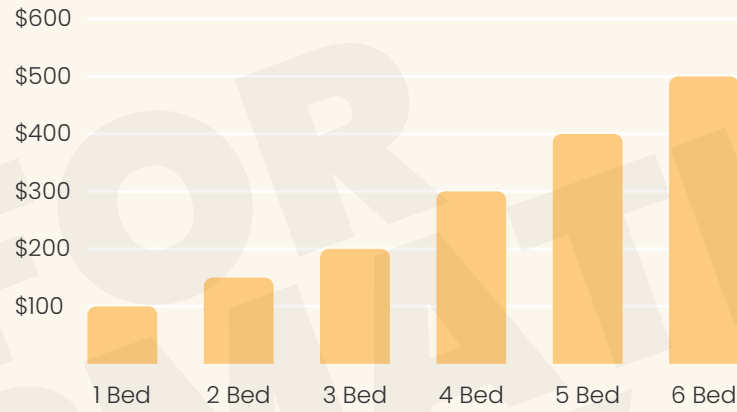
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**SUPPLY BY BEDROOM**



**DAILY RATE RANGE BY BEDROOM**



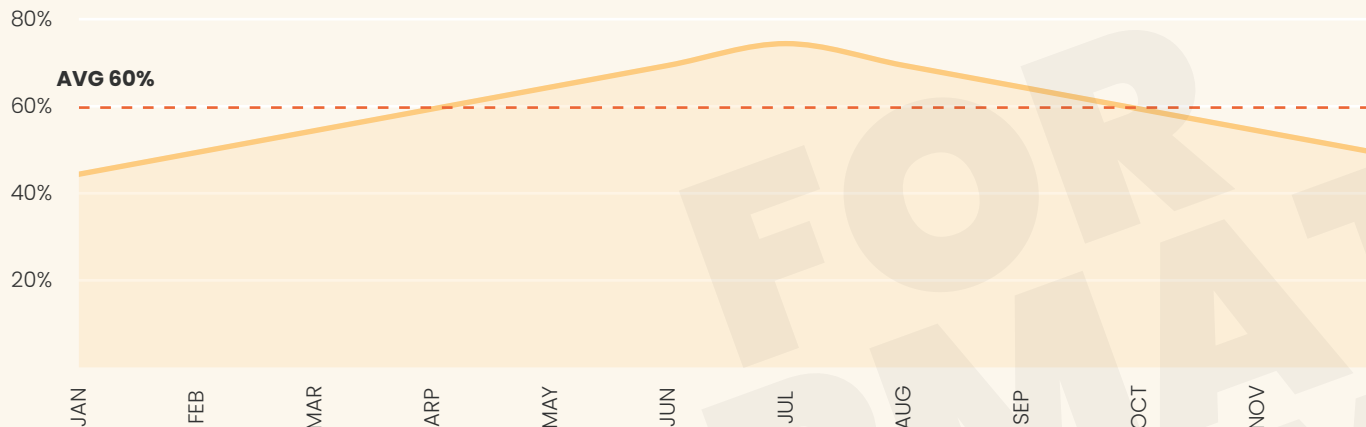
**DAILY RATE PERFORMANCE**

- The 1 to 4 bedroom categories of the Sanur area performed consistently across 2024, while the 5 & 6 bedroom category varied considerably, most likely due to limited supply.
- The strength of the 2 bedroom daily rate in comparison to 1 bedroom assets may provide some insight into its dominance in the expansion of new properties.

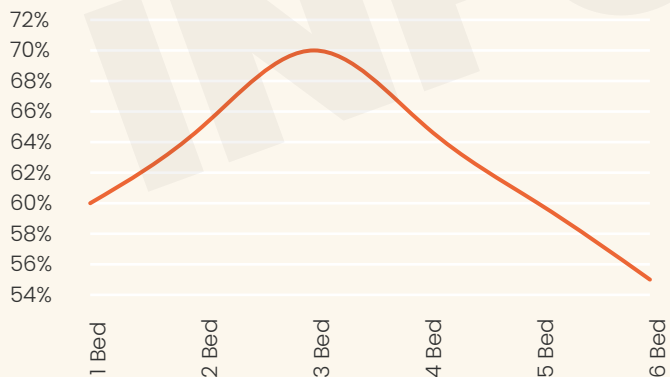
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**AVERAGE OCCUPANCY**



**OCCUPANCY BY BEDROOM**

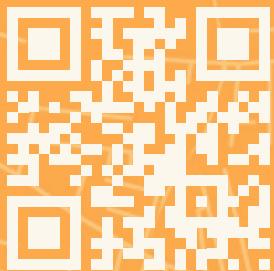


**OCCUPANCY PERFORMANCE**

- The following data tracks the minimum and maximum occupancy across bedroom categories as well as the average occupancy.
- Sanur outperforms the Bali market average occupancy by almost 10%, when coupled with a stable supply market suggests a mature rental market.
- All categories perform steadily in Sanur indicating resilient demand.

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