

Property & Demographic Advisory

Practical insights into aligning clients with changing demographics

KPMG's Property & Demographic Advisory is a 'Centre for Excellence' in demographics as it relates to the business sector. Our services broadly fit within four main categories however we often draw on a number of these to successfully deliver our projects.

Demographic / Market Analysis

We analyse demographic data to define markets using Geographic Information System (GIS) technology. We extract and analyse demographic trends within a geographic context. Our analyses often involve linking demographic data with client and/or industry data to provide insight into current market positioning and identifying market opportunities for clients.

Case Study:

Project: Inner City Perth property demand and trend analysis.

Process: This project involved a timeline trend analysis of the demographic and cultural profile of Perth's inner city population compared to equivalent geographies in Sydney, Melbourne and Brisbane. This information was then used as an input into the formulation of 30 year dwelling demand projections by dwelling type (flat/unit, townhouse and detached dwellings) based on the projected age profile of residents.

Outcome: This report identified important trends in residential dwelling demand that had not yet been quantified. This has since helped the client in formulating and validating its development strategy.

Strategic Planning

We develop demographic and market evaluations to provide important insight into medium and long-term strategic planning. Through this process we undertake a competitor and operational gap analysis to identify opportunities for expansion and consolidation. The identification of current and future demographic trends, combined with an operational knowledge of industry and competitors provides crucial insights into aligning clients with their markets and workforce.

Case Study:

Project: Strategic planning for an aged-care provider.

Process: We assisted the client in the development of a strategic plan. This involved the identification of current market position and existing gaps in relation to major competitors and the industry. We provided forecasts of key demographics to identify future opportunities and align strategic objectives with future market trends.

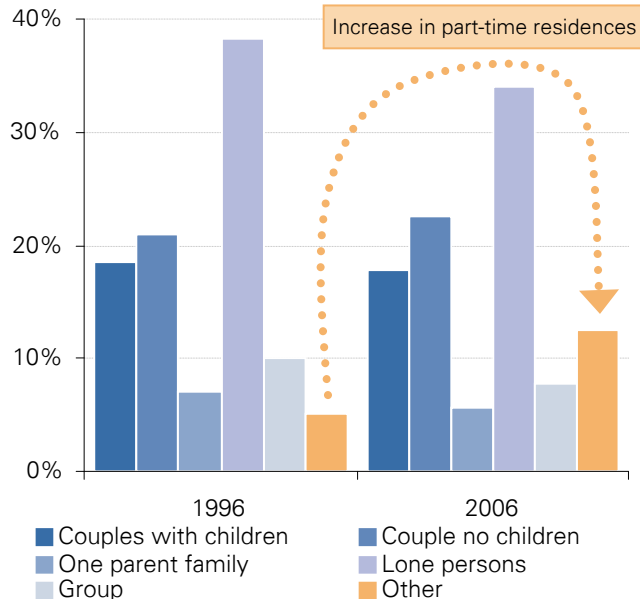
Outcome: The study provided key insights into the client's current and future market positioning in relation to the aged care industry which allowed them to develop and implement their strategic plan.

Contacts:

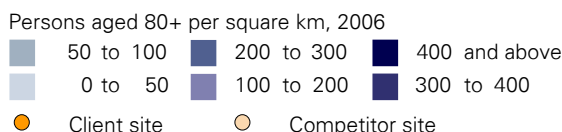
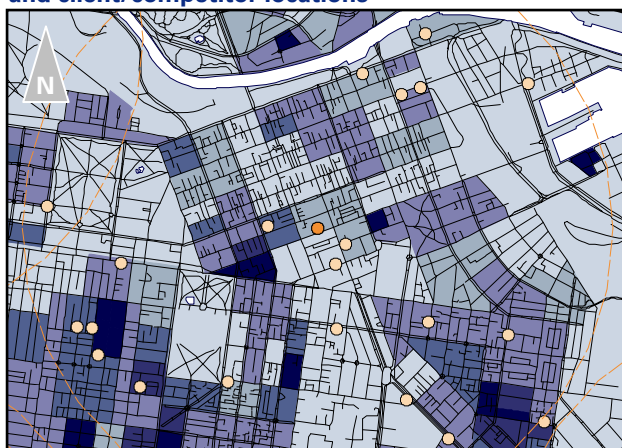
Bernard Salt
Partner in Charge
+61 3 9288 5047
bsalt@kpmg.com.au

Sarah Read
Director
+61 2 9335 8355
sread@kpmg.com.au

Percentage distribution of occupied dwellings by household type in Inner City Perth, 1996-2006



Forecast population density of persons aged 80-plus and client/competitor locations



Source: Department of Health and Ageing, KPMG Property & Demographic Advisory

Master Planning

We advise on the composition, scale, timing and staging of the property components of master-planned developments. This advice includes demand evaluation within the context of the existing and future built environment.

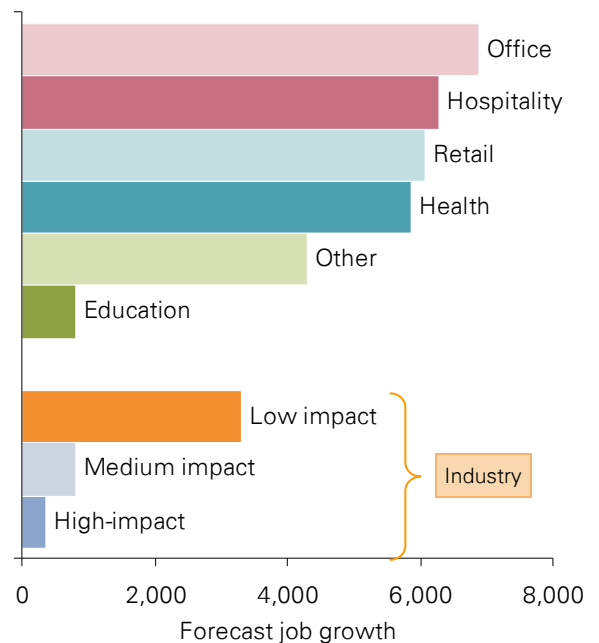
Case Study:

Project: Master planning for a town centre development in Queensland.

Process: We undertook a master planning analysis for a developer with a prominent site located within the proposed development of a regional town centre. KPMG provided an outlook for the region based on population projections in defined catchment areas and a retail economic analysis to identify the potential scope for retail facilities. This information assisted the developer to ascertain the 'highest-and-best-use' for the site and the appropriate staging of the development.

Outcome: The findings brought into question the amount of land allocated to industrial purposes in the area resulting in a second report being commissioned to provide a detailed analysis of the likely future job-base in the region, including future land requirements by employment type.

Regional forecasts of job demand by type



Source: ABS, KPMG Property & Demographic Advisory

Futuristic Studies

We provide futuristic studies of the social and generational traits which impact business. This involves analysing what the customer/employee of the future may look like and how they may behave. Most importantly this analysis provides insight as to what this means for government and business. Most often this comprises the preparation of a scenario outlook based on projected demographic trends. This work is frequently published or made available to the media.

Case Study:

Project: Opportunities and challenges for the funds management industry engaging with Generation Y.

Process: The study aimed to provide strategic advice to the funds management industry on what it must do to establish a relationship with future accumulators of wealth and to attract and retain the best employees from this generation. It considered the results of a survey of funds management businesses across 17 nations and the views of Generation Y in focus groups commissioned in London, New York, Tokyo, Frankfurt and Sydney. The report also summarised the output of one-on-one interviews held with senior executives from the funds management industry in the US, the UK, Germany and Australia.

Outcome: The study provided the industry with a unique perspective of itself and its interplay with Generation Y.

