

EXPAT HOUSING OVERVIEW:

RUSSIA AND CIS
H1 2019

Who is a Tenant

NATIONALITIES

16% of all requests from potential tenants, over the past year, were made by Russian citizens. The other 84% of requests were made by foreigners.

SINGLE/FAMILIES

The share of families in the overall structure of demand is 91%. Interest in prime apartments came predominantly from potential tenants in the age range of 30 to 44 years old, at 58% of all requests received this year.

Supply

HIGH-BUDGET SUPPLY VOLUME INCREASED BY 9% FROM THE BEGINNING OF THE YEAR

Over the first six months of 2019, the volume of supply has increased by 9% and has increased by 2% when compared with the same period a year ago.

The maximum volume of prime rental apartments on the market this year was observed in the month of June. The last time a higher figure occurred was in September last year.



Top 5 districts for supply H1 2019

- Arbat-Kropotkinskaya
- Tverskaya-Kremlin
- Zamoskvorechye
- Leningradsky Prospekt
- Leninsky Prospekt

As year ago, around 2/3 of all supply (63%) was concentrated within five districts: Arbat-Kropotkinskaya (20%), Tverskaya-Kremlin (17%), Leningradsky Prospekt (8%), Zamoskvorechye (9%) and Leninsky Prospekt (8%).

Chart 1.1

Analysis of prime real estate tenant's nationalities

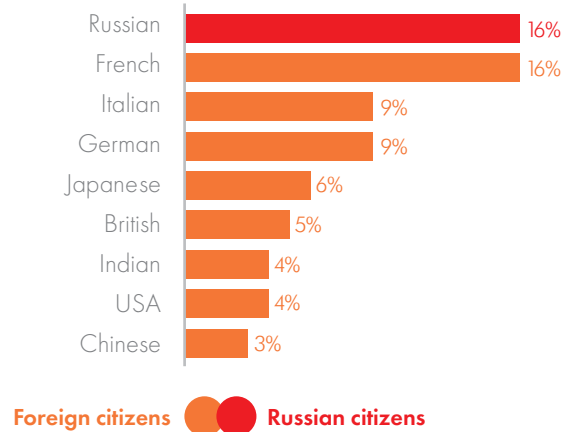


Chart 2.1

Dynamics of the supply of Moscow prime rental market (January 2018 – June 2019)

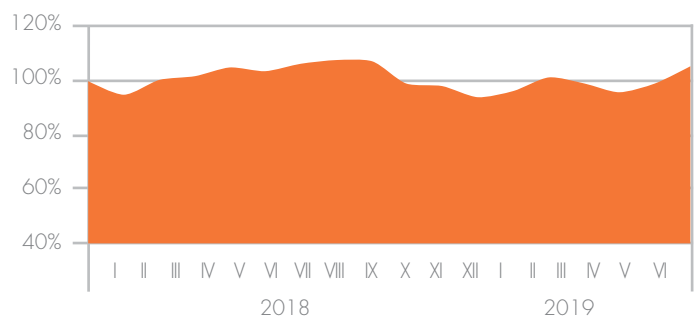


Chart 2.2

Analysis of the most popular areas for living in Moscow in terms of supply



Demand

Chart 3.1

Dynamics of the demand of Moscow prime rental market (January 2018 – June 2019)

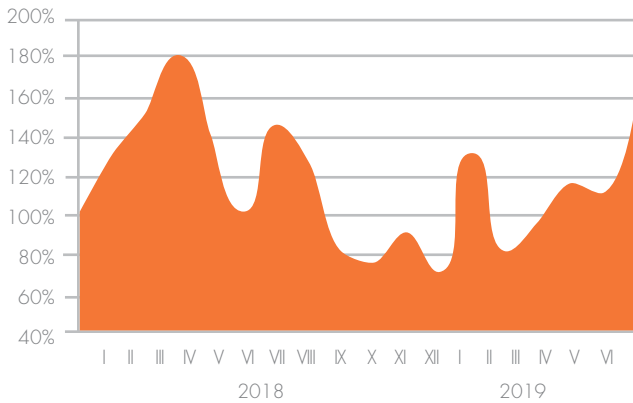


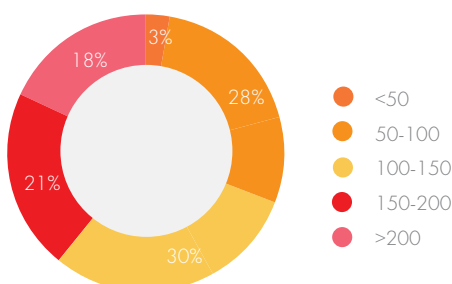
Chart 3.2

Analysis of the most popular areas for living in Moscow in terms of demand



Chart 3.3

Demand analysis of the most popular areas for living in Moscow in terms of sq.m.



REQUESTS FROM POTENTIAL TENANTS INCREASED

Requests from potential tenants over the past six months increased by 19%, in comparison with the previous year.



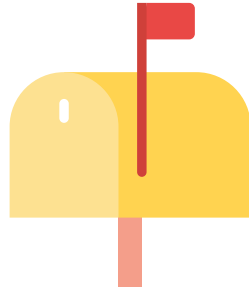
Top 5 districts for demand H1 2019

- Leningradsky Prospekt
- Arbat-Kropotkinskaya
- Tverskaya-Kremlin
- Zamoskvorechye
- Patriarshie Prudy

LENINGRADSKY PROSPECT KEEPS THE LEADING ROLE IN THE MOST POPULAR DISTRICTS RATING

The Leningradsky Prospekt District (13%) (in close proximity to the Anglo-American School), as well as the Zamoskvorechye District (8%), was the most popular among potential tenants. Also, Arbat-Kropotkinskaya, Tverskaya-Kremlin, and Patriarchy Ponds were also in demand, each with 6% of overall demand.

The largest demand came from expats that were interested in 100-150 sq.m. apartments, reflected by nearly 30% of requests.



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