

THE
EDIT
SOUTH BANK



INVESTOR GUIDE

February 2025



Knight
Frank



South Bank has, and continues to evolve, as one of London's most exciting neighborhoods, blending history, culture, and modernity with excellent transport links to the city and beyond...

A growing commercial district

- A growing commercial district: 2.4m sq ft of prime office completions, with a further 1.6m sq ft currently under construction.*
- Southbank office rents have grown by an annual average of 5.7% - more than twice the annual rate of inflation over the same period (2.4%).*
- 85,624 sq ft of new bars, pubs and clubs opened.**
- 189,523 sq ft of new restaurant space opened.**
- More than 70,000 sq ft of new event and attraction space opened.**

*Source: Knight Frank Research

**Source: Knight Frank estimates. Within a 20-minute walk-time. New openings are since 2014



Residential supply shortfall

Despite the thriving commercial scene, the future pipeline of new homes in Prime Central London ("PCL") has become highly constrained, contracting by 70% over the past decade.*

New supply in PCL is on a downward trajectory despite robust demand, with London's long-established reputation as being a safe haven for investment continuing to remain. Such strong levels of demand are serving to further exacerbate the declining development landscape, which, in turn, is underpinning pricing.

Purchasing a new home at the Edit, when considered in the context of this supply and demand imbalance in PCL, therefore represents a remarkable investment opportunity. Occupying a prime Zone 1 location and at the heart of the highly sought-after SE1 postcode district, a home at the Edit places you at the epicentre of one of London's most extraordinary neighborhoods.

* Source: Knight Frank Research (Prime Central London: Residential Development Update 2024)





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London's cultural heart

Stretching along the southern bank of the River Thames, directly across the water from Westminster and Covent Garden, South Bank seamlessly bridges history and modernity.

Once London's powerhouse with the Bankside Power Station supplying electricity to the city, today this historic building houses the Tate Modern, a symbol of the area's transition into a thriving cultural and commercial hub.

South Bank has an eclectic character. The art galleries and theatres sit alongside sleek office towers where global businesses reside. As the sun sets, the riverside comes alive with vibrant restaurants and bars drawing in the discerning crowd. From red carpet events at the British Film Institute to Tate Lates, there's always somewhere to be or something to see. And The Edit is at the centre of it all.



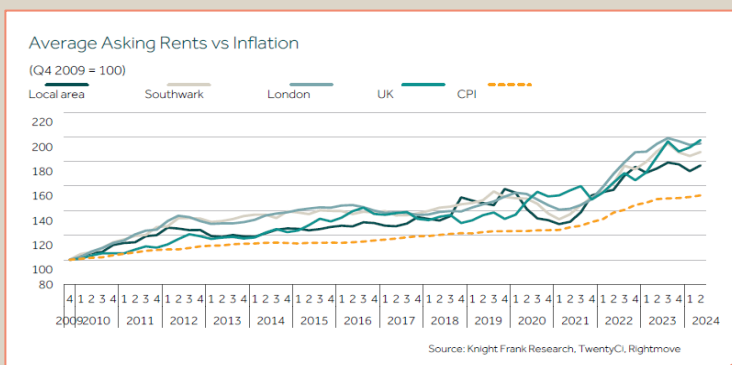
A smart investment

Southwark has experienced significant growth, positioning the location as a prime area of London for investment.

- 20.9% growth in rental asking prices in the local area was recorded between Q2 2019 and Q2 2024.*
- The rental market is anticipated to experience continued growth over the next five years with the Knight Frank Rental Market Forecast (November 2024), predicting cumulative rental growth of 20.5% for PCL.*
- The total house price growth in Southwark since Q4 2009 is 77%.**

*Source: Knight Frank Research, 2024 (Defined as 0.75 miles around the development, SE1 0U)

**Source: Land Registry



***Source: TwentyCI & Rightmove

Expanding demand

Both the local area surrounding The Edit and the wider Borough of Southwark are experiencing growing population numbers, especially within the economically active age groups. At The Edit, 59% of the local population are under the age of 35. This is 6% higher than the total population under the age of 35 within the Borough of Southwark (53%).*

Over 3,000 households moved into the local area surrounding Th Edit, between 2020 – 2023. 68% of these households were classified by MOSAIC as 'City Prosperity', demonstrating that residents are largely high-status city professionals living in central locations and pursuing careers with high rewards. Within the local area, 51% earn on average £70,000 per annum. High income residents are not uncommon to South Bank, with the median household income of the leading 'City Prosperity' demographic just under £125,000 per annum.**

*Source: Knight Frank Research, 2024 ('Local area/ local population' defined as 0.75 miles around the development, SE1 0U)

**Source: Knight Frank Research, Experian

Local demographic highlights:

- 97,680 Residents in the local area (mid-2022 estimates)
- 68% of all households in the local area are MOSAIC Group A: 'City Prosperity'
- 6% population increase between 2012-22
- 5% further population growth estimated by 2032
- 8.2% growth in households estimated in Southwark between 2023-33, which equates to an additional 11,238 households
- 56% of these households are expected to enter the PRS sector
- In 2020, 42% of the 3,035 households that moved into the local area occupy the PRS sector, demonstrating the strength of the local rental market.
- 51% of households that moved to the local area since 2020 have an income greater than £70k per annum

Top 10 Source Local Authorities for Households that have moved to the Local Area (2020-2023)

Source local authority	Owner occupied	Privately rented
Southwark	19%	14%
Lambeth	12%	10%
Tower Hamlets	6%	7%
Westminster	5%	5%
Wandsworth	4%	5%
Camden	4%	3%
Islington	5%	3%
Hackney	4%	2%
Newham	1%	3%
Hammersmith and Fulham	2%	2%
Other	39%	46%

- Household incomes in the local area surrounding the Edit are significantly higher than across the wider borough.
 - £129,200 per annum - Median Owner Occupier Household Income.
 - £115,800 per annum - Median PRS Household Income.

Source: Knight Frank Research, Experian



The local employment scene

25% of jobs in Southwark are within the tertiary and quaternary sectors, including the scientific and technology industries. Additionally, 60,000 new jobs are forecast for Southwark by 2033, and 29% forecasted employment growth between 2023 and 2043.

Source: Knight Frank Research, Oxford Economics

Higher education

London is not just the most populous city in the UK. It is home to the largest concentration of higher education institutions of any UK region. With almost 50 universities and higher education colleges in the London Higher membership, London's higher education sector offers students an unrivalled choice about where and what to study.

As of January 2023, London's universities are home to over half a million students and London's student population is as local as it is global. Collectively, London's higher education institutions educate more students from their 'home' region than their counterparts anywhere else in the country while also being proudly international. Roughly one third of students in the capital come from overseas, with the vast majority from outside the European Union (EU).

Both student markets are growing rapidly. A report by the Higher Education Policy Institute (HEPI) projects that over 40% of the 360,000 new higher education places that will be needed for domestic students in England over the next decade will be required in London and South East.

London's appeal to international students similarly shows no signs of slowing. Another HEPI report reveals that well over 70,000 first-year international students come to study in London each year.



This is more than three times the number of international students coming to study at higher education institutions in the West Midlands and more than twice the number of overseas students enrolling at universities across the whole of Scotland. For international students, then, the London study brand remains strong, and the city continues to top global best student cities rankings.

Source: UCAS

Education highlights:

- Four of the city's universities, ranked within the global top 50, are within 30 mins of The Edit.
- 20% growth in students attending London universities since 2017/18.
- 43% growth in international students attending London universities since 2017/18.
- 70% of students are unable to access purpose built student accommodation, presenting an opportunity for investors to offer private rental accommodation.

Source: Knight Frank London City Market Report, Student Prosperity Research, 2023/2024

Knight Frank Sentiment Survey

The trend of working from home has persisted since the pandemic, and the importance of delivering a range of high-quality amenities that suit residents' daily needs has become more important than ever.

72.5% of buyers consider a home office/study to be either important or necessary when purchasing a property. Similarly, proximity to local amenities such as restaurants, shops, pubs, and entertainment centres along with good transport links are significant factors that influence buying decisions, ranked as either important or necessary by 87% and 85% of buyers respectively.

The Edit caters excellently to all of the above requirements. As well as delivering spacious apartments with space to work from home, residents have access to the working lounge and private terrace, all of which will benefit from high-speed broadband. In addition, being located just a short walk from London's South Bank, an abundance of local amenities can be accessed with ease.

World famous bars and eateries can be found just around the corner at Borough Market. Entertainment and cultural attractions are easily accessible at nearby the Tate Modern, the National Theatre and the Southbank Centre. Proximity to Southwark Tube and the Jubilee line complete the development, connecting Southbank to the rest of London.

Most important factors to buyers when choosing a property?

94%

Value access to outdoor spaces

86%

Value proximity to green spaces

86%

Value proximity to amenities including restaurants, entertainment, pubs etc.

85%

Value access to transport links

Source: Knight Frank Sentiment Survey, 2024



SOUTHWARK TUBE STATION

Jubilee Line
6 minute walk

Waterloo – 1 min

Westminster – 2 mins

Bond Street – 6 mins

Canary Wharf – 8 mins

WATERLOO

National Rail | Jubilee | Northern
Bakerloo | Waterloo & City
17 minutes' walk

Bank – 4 mins

Tottenham Court Road – 5 mins

Leicester Square – 6 mins

King's Cross St. Pancras – 13 mins

LONDON BLACKFRIARS STATION

Thameslink | National Rail | Circle &
District Line
10 minute walk

Cannon Street – 7 mins **Sloane**

Square – 12 mins **Liverpool**

Street – 13 mins

Gatwick Airport – 35 mins

Source: [google.com/maps](https://www.google.com/maps) and [tfl.gov.uk](https://www.tfl.gov.uk) (Travel times are indicative and based on time to station entrance)

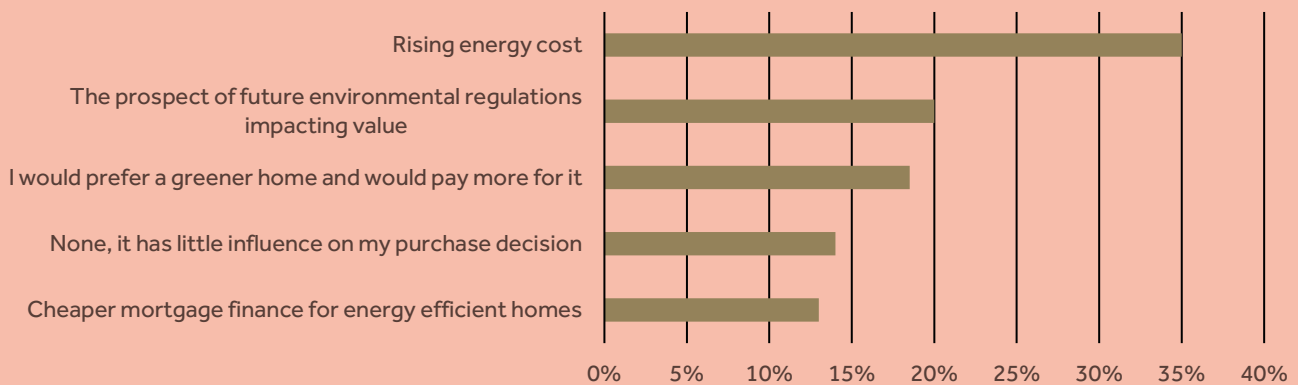


The housing market sentiment survey also confirms that higher energy costs are the key driver for those looking to move to a more energy efficient home. More than a third of the survey respondents cited rising energy costs as the key factor, while 20% cited the spectre of future environmental regulations affecting the value of inefficient homes.

When thinking of a future purchase, 72% of respondents said the energy efficiency of their next home was more important to them, compared with 18 months ago.

Interestingly for the new homes market, some 18% said they have a preference to live in a greener home and said they would pay more for it, if necessary.

What factor is likely to influence your decision to purchase a more energy efficient home in the future?

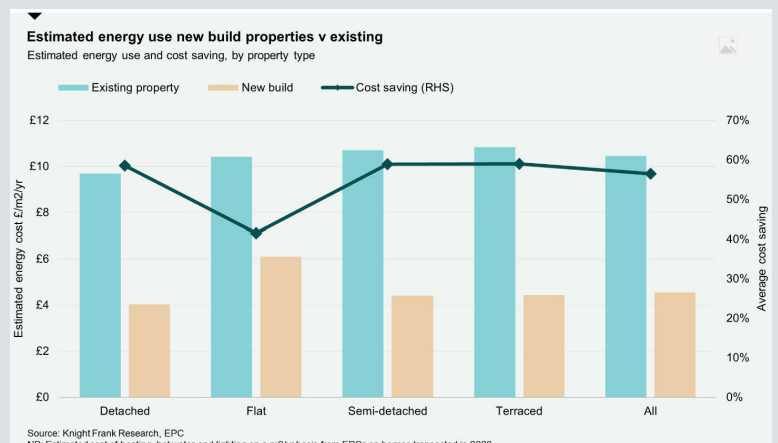


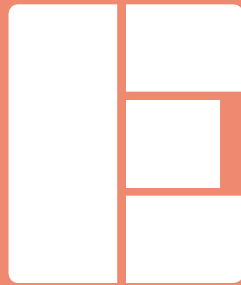
Source: Knight Frank Sentiment Survey, 2024

The energy efficiency of homes is now front and centre for both buyers and tenants following a sharp rise in energy prices and an enhanced focus on environmental issues. As a result, research has been conducted in relation to the potential savings new-build homes offer.

The numbers are compelling. Knight Frank's analysis of EPC data from more than 600,000 new and existing properties transacted over the last three years points to an average 56% saving on annual energy costs (lighting, heating and hot water) when comparing a new build with an existing property.

The Edit isn't short on sustainable features, with thermal efficient, high performing acoustic glazing, green roofs, photovoltaic panels and landscaping designed in collaboration with Kew Gardens to enhance biodiversity.





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