

TWELVETREES PARK

LONDON E16

EAST LONDON *Guide*

Why should you invest in East London and TwelveTrees Park?



Berkeley
Designed for life

DISCOVER EXCITING *East London*



“Why buy in East London?”

Historically, West London has been a highly desirable location for people to live and work. Years of demand has outstripped supply, seeing the West surge in popularity and prices. As London’s population increases year on year, new pockets of London are being discovered and earmarked for development, the majority of which are in East London.

Green spaces and excellent transport links (local, national and international travel), coupled with attractive housing, good schools and universities, an array of leisure facilities and employment opportunities, are just some of the reasons why East London is fast becoming the number one choice for investors.

Pricing in East London is also more affordable than other areas and has some of the highest forecasts for growth, suggesting the potential for significant returns on investment.

This guide will highlight some of the changes happening in East London and what these could mean for the savvy investor.*



London City Airport



Canary Wharf



Stratford

Computer generated image, indicative only, subject to change.

*Information used in this document has been gathered from various sources, information provided is indicative only. Investments can go up as well as down and you should always carry out your own research prior to making an investment.

LONDON *moves east*



Lifestyle image, indicative only



Lifestyle image, indicative only

Who is moving east?

Just under two thirds of all households moving into East London can be grouped into two household groups, and four household types. City Prosperity households, generally very successful and high-earning individuals, tended to move into Hackney, Newham, Tower Hamlets and Waltham Forest. Rental Hubs, younger professionals generally at the start of their careers, were more inclined to look to the three most eastern boroughs, in search of more affordable well connected areas.

The most common household types moving into new build properties in East London.



CITY PROSPERITY 33%

Metro High-Flyers (23%)

Metro High-Flyers are **highly educated and ambitious 20- and 30-somethings renting expensive apartments**, either on their own or with a partner. These ambitious high-flying graduates, typically from one of the UK's leading universities, are aged between 26 and 35 and are most common in the suburbs of the Capital, **easily commutable to jobs in the City and Central London**. They live alone or with partners in **expensive private rented properties**.

Penthouse Chic (10%)

Penthouse Chic are young, **highly successful City workers renting in Central London**. Spectacular salaries from demanding jobs in the City **pay for their premium-priced flats**. These young people are typically aged under 35 and can afford to live on their own in apartments in very expensive locations. Penthouse Chic **rent their luxury apartments in purpose built residential developments** from private landlords for, often, exorbitant amounts.



RENTAL HUBS 32%

Flexible Workforce (20%)

Typically aged in their late 20s and 30s, Flexible Workforce live in highly transient areas alongside other relatively short-term renters. A combination of single households and homesharers, **70 per cent rent from private landlords** and will tend to stay at an address for between one and three years before moving on. **They live in one- and two-bedroom flats in reasonably high value locations** from which they can **easily commute to jobs** in the city centre.

Central Pulse (12%)

Central Pulse are predominantly under 35 and single and can often afford to live alone rather than having to share. **The vanguard of the regeneration of urban areas** in and around the centres of larger cities, **Central Pulse live in flats in new build residential developments** and apartments in recently converted warehouses.



Source: Experian



10,000,000

London's population is set to increase by more than 2 million, to 10 million people by 2030

Source: Oxford Economics London 2030 Report

What do they want from a home?

Since COVID-19, what we want from our homes has become more important. A recent survey from Savills tells us:

48%

of respondents said accessibility to Wi-Fi had become more important to them.



71%

of under 40s said outside space had become more important.



38%

of respondents significantly more inclined to work from home.



57%

said a separate working from home space has become more important.



The homes at TwelveTrees Park will have super-fast Wi-Fi capability and the 4.5 acre park will also be Wi-Fi-enabled.

TwelveTrees Park boasts over 12 acres of green, open space, including private residents' courtyards, the science garden and the linear park.

Work from home in style in the residents' business lounge, or work outside in the Wi-Fi-enabled park

Source: Savills

EAST LONDON *growth*

The boroughs of Tower Hamlets and Newham are forecasted to outperform the rest of London

The value of goods and services (GVA) produced in Tower Hamlets and Newham is expected to increase by 24% by 2030, outpacing the growth expected across the rest of London (19%). The number of employees in Newham is forecasted to increase by 12% by 2030, again a faster rate of growth than expected to see across the rest of London (10%).

Newham projected employment growth

110,700 ▷ **124,300** **+12%**

2018 2030

Sources: Oxford Economics / Savills

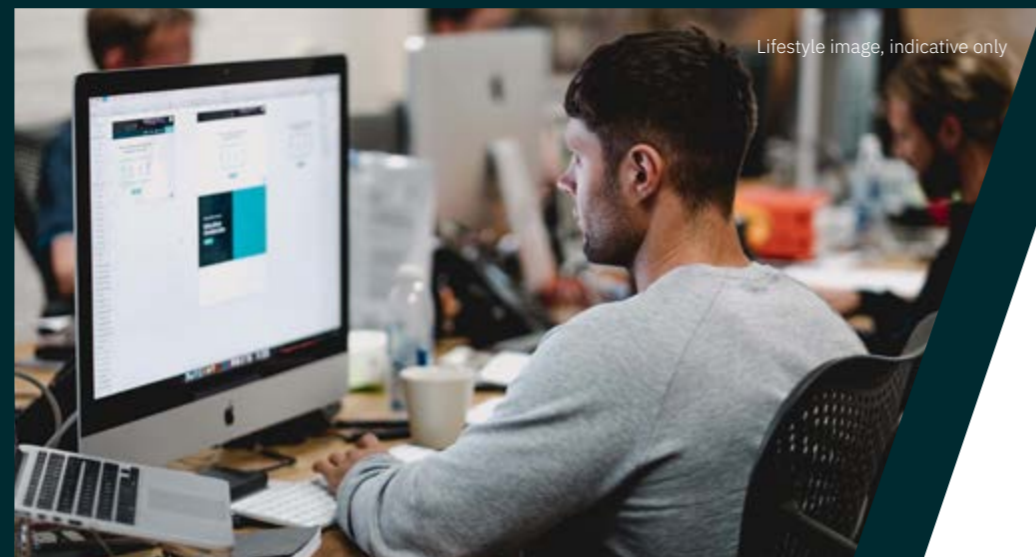
Newham projected population growth

364,346 ▷ **465,435** **+28%**

2020 2030

Source: <https://www.newham.info/population/>

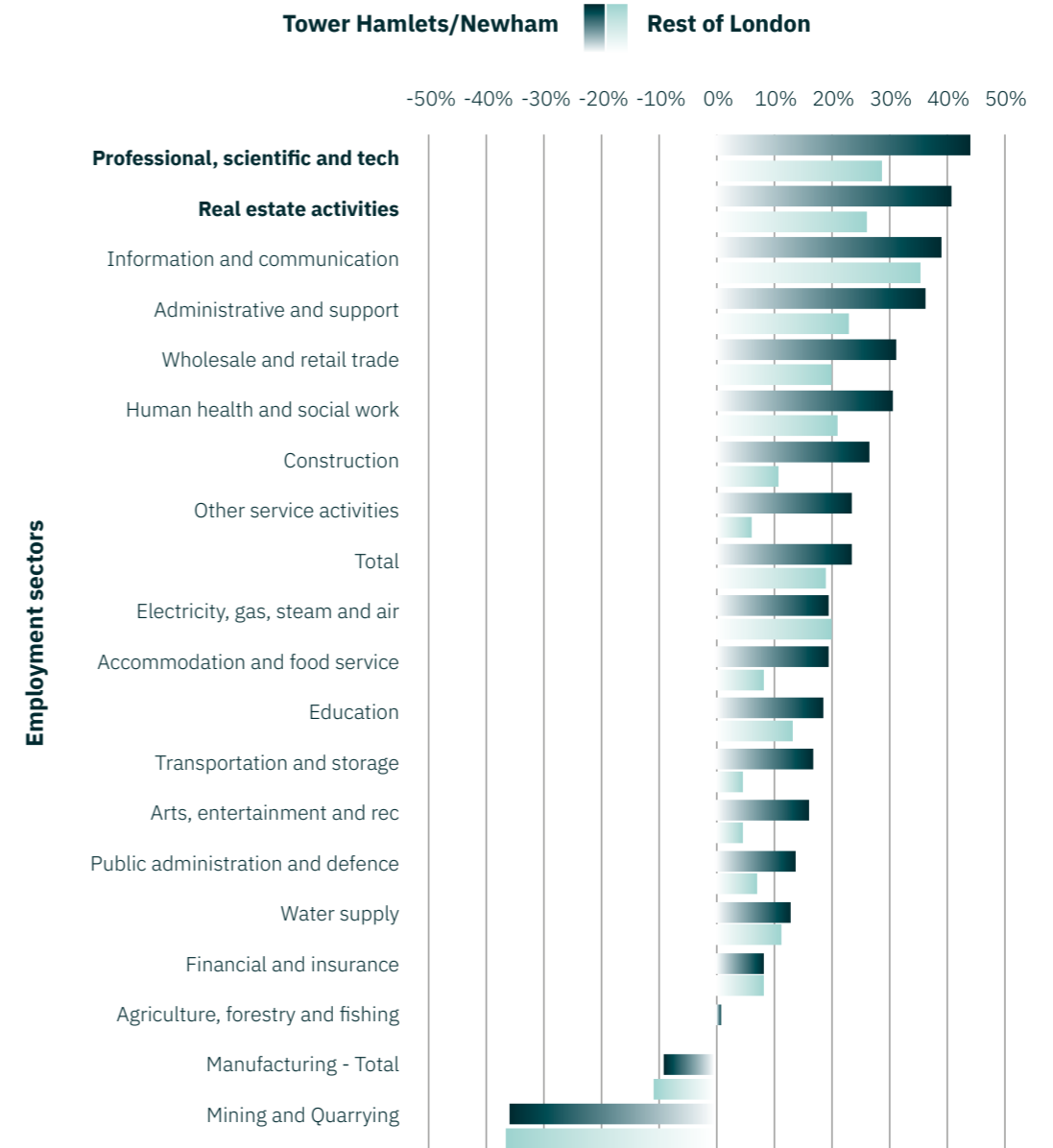
Oxford Economics is forecasting for average earnings in Newham to increase by 30% by 2030.



Lifestyle image, indicative only

Tower Hamlets and Newham are forecasted to see greater GVA growth than the rest of London across all but one sector.

Forecasted growth in GVA (2018 - 2030)



The professional, scientific and tech sector is forecasted to grow by an average of 29% in London by 2030 however in East London this is much higher at 44%. Similarly the real estate sector is forecasted to grow on average by 26% in London by 2030 but East London predicts a 41% increase.

+44%	+29%	+41%	+26%
Tower Hamlets/Newham	Rest of London	Tower Hamlets/Newham	Rest of London
Professional, scientific and tech		Real estate activities	

ESTABLISHED *business hubs*

Whilst the hype surrounding East London can feel recent, it has slowly been building itself into an established location for international business for many years. These locations demonstrate the success of East London for business. Whether it's financial services, technology and enterprise, retail or education, East London is fast becoming the business capital of the UK.

The City of London *Time from TwelveTrees Park (TTP) 10mins**

522,000

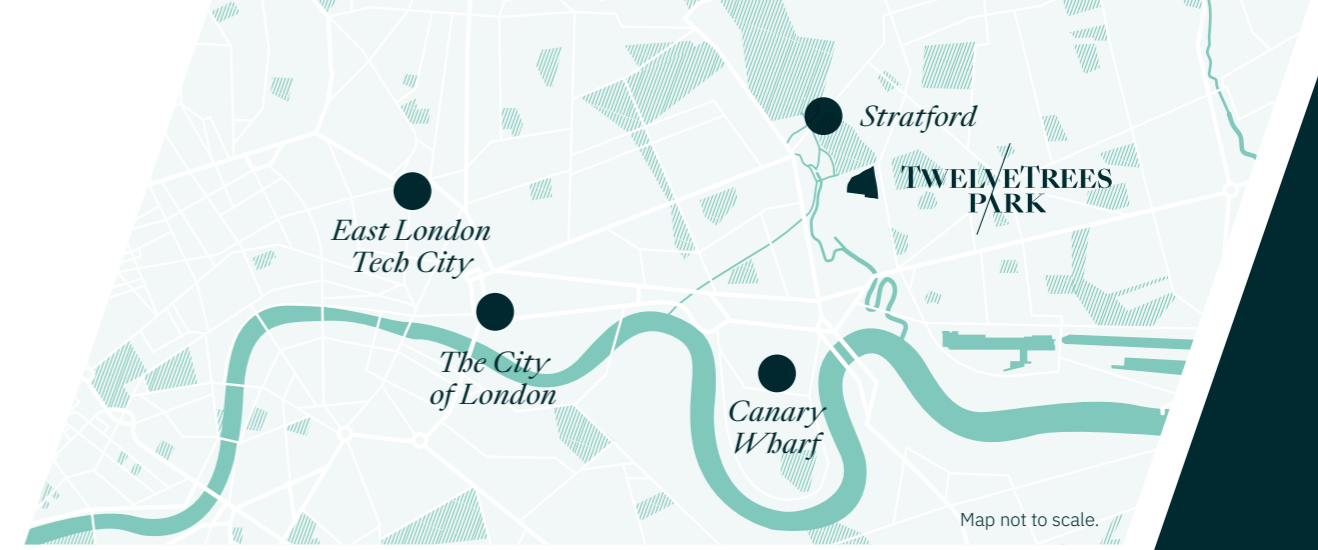
people are employed in the City of London.

- **70%** of City workers employed in highly-skilled jobs.
- Home to the world's **largest foreign exchange market**, volumes have grown by **23%** since 2016 with an average of **\$2.7 trillion**-worth of trades being handled in the UK every day – that's around **two-fifths** of the world's global daily volume. (Source: Knight Frank Growth Report 2020).
- In 2019, the City of London had **23,890** businesses.

TOP COMPANIES IN THE CITY OF LONDON INCLUDE:

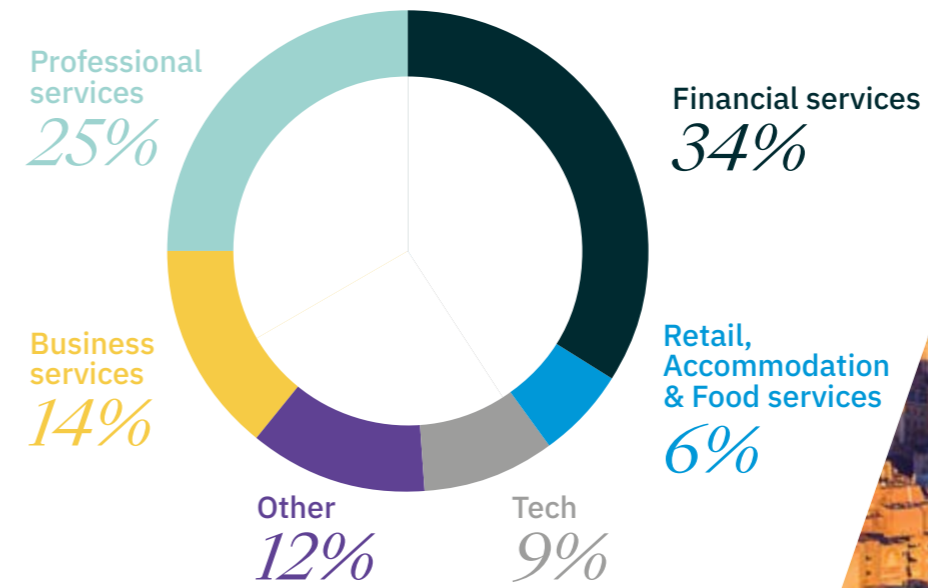
Goldman Sachs, Barclays, Amazon, Bloomberg, J.P Morgan.

(Source: Office for National Statistics/ Glassdoor)



Total jobs in the City of London

Financial, professional and business services provide the most jobs and drive job growth.



Sources: The City Statistics Briefing 2019 Appendix 4



East London Tech City *Time from TTP 27mins**

- Home to some of the world's largest tech companies including Google's Innovation Hub and Amazon's digital media development centre.

£9bn

invested in 2019 and

£7.5bn

attracted in venture capital in 2020, a new record for UK and Europe. ^

- Employs **110,000** in the rapidly growing Professional, Scientific and Technology sector.
- Has secured its position as the world's third top tech ecosystem, behind Silicon Valley and New York.
- London has ranked 2nd in the global Fintech index. ^^
- Tech Nation, the Professional, Scientific and Tech sector in London is forecast to grow by **18%** over the next ten years, more than almost every other sector.

TENANTS INCLUDE: Cisco, Amazon, Adobe, Unilever, Deloitte Digital, Inmarsat, CBS, Farfetch, WeWork, Drakes, LK Bennett, Capco, Monzo, Gorkana Group, Maxus, Rise London, R/GA.

Source: Savills. ^ Source: Forbes. ^^ Source: Findexable_Global-Fintech-Rankings-2020

*Journey times taken from 6.30am and are approximate only. Source: www.tfl.gov.uk. Crossrail expected 2021.



“London is the global tech capital of Europe”

Mayor Sadiq Khan

ESTABLISHED *business hubs*



Canary Wharf *Time from TTP 7mins**

- Canary Wharf is home to over **150** major office tenants, which between them generate **£40.4bn** of GVA of which **£19.7bn** is directly attributable to Canary Wharf.

100,000+

people work in Canary Wharf with an average salary of **£100,000** per annum† compared to an average salary in London of **£40,303**††

- Currently six shopping malls across Canary Wharf and the area receives over **49m** visitors each year.
- 11.9m** sq ft of office, residential, retail and social buildings under construction or design.

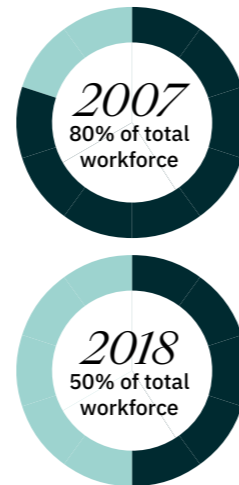
EXISTING BRANDS BASED HERE: ANZ, American Express, Barclays, BP, CITI, Credit Suisse, Deutsche Bank, EY, HSBC, HM Government, IBM, JP Morgan, JLL, KPMG, Mastercard, Morgan Stanley, Revolut.

RECENTLY ADDED TENANTS: Deliveroo, Société Générale, Gorkana, Energy Saving Trust, British American Tobacco, Government Property Agency.

† Source Knight Frank: <https://www.knightfrank.co.uk/office-space/guides/canary-wharf>
 †† Source: www.glassdoor.co.uk/Salaries/london

Canary Wharf has historically been seen as London's financial district, but the area is diversifying with many more industries taking root there.

BANKING & FINANCIAL OCCUPIERS



Canary Wharf

See you back at the office

Since COVID, the number of people working from home has reached an all time high. But a recent survey from Savills has confirmed the need for office space as:

89%

of respondents believe the office will remain a necessity.

3:1

ratio of people in favour of the office for personal growth.

60%

of people believe the office is best placed for colleague collaboration.

18 - 24

year olds more likely to prefer working in an office to help learn, be seen, network and collaborate.

Source: Savills Office FIT Report

Stratford *Time from TTP 3mins**

- Stratford is set to see huge changes in the coming years with major investment in developments such as Here East, East Bank and IQL.
- The International Quarter is a

£2.4bn

mixed-use development at the heart of Stratford, London.

- Once complete in 2025, IQL will be home to businesses and organisations employing over **25,000** people.

TENANTS INCLUDE: TfL, Financial Conduct Authority, Unicef, The British Council.

*Journey times taken from 6.30am and are approximate only. Source: www.tfl.gov.uk
 Crossrail expected 2021.



Stratford

INVESTMENT & expansion

As well as existing business hubs, considerable investment is being made in East London to create new business, leisure and educational facilities.

£2.8bn investment in the region

100,000 new jobs

8,500 new student placements

Combined sources detailed on page 13



Asia Business Park

- Set to be London's third business and financial district.

£1.7bn investment

- **460,000** sq ft of new office space.
- **21** contemporary, new office buildings, creating **30,000+** new jobs and contributing **£6bn** to the local economy.

Sources: Savills / ABP Investment Brochure / CoStar



Here East

- Here East is a new hub for university campuses, global business and entrepreneurs.
- Home to **4,500** people working and studying on the campus.

95,000+ visitors over the last 12 months

- **1,200,000** sq ft of space and will create more than **7,500** jobs on site and in the local community.

TENANTS INCLUDE: BT Sport, UCL and Ford Mobility.

Source: Savills

Royal Docks

The GLA is to relocate its HQ to The Crystal Building in the Royal Docks in Newham at the end of 2021. This move has the potential to act as a catalyst for the regeneration of Royal Docks which is set to produce **25,000** new homes and **60,000** new jobs over the next 20 years.



East Bank

- A new powerhouse for innovation, creativity and learning on Queen Elizabeth Olympic Park.

£1.1bn investment

- The Mayor of London's £1.1 billion investment into East Bank is the most significant single investment in London's culture since the legacy of the 1851 Great Exhibition.
- Will bring an additional **1.5m** visitors to the Park each year, creating more than **2,500** jobs and generating an estimated **£1.5bn** for the local economy.
- UCL set to create a new campus, UCL East, for around **4,000** students.
- BBC Music studios will provide a new music hub.

Sources: Savills / The GLA

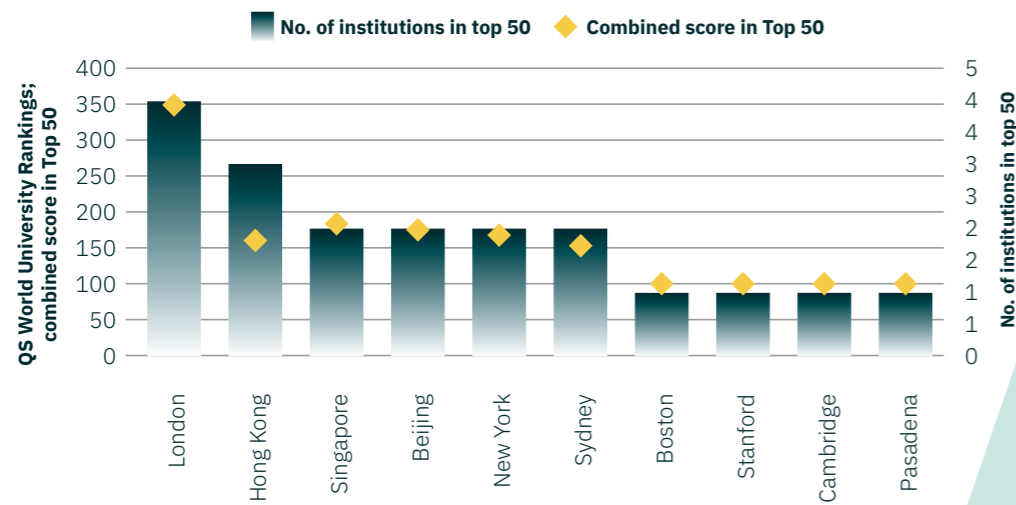
Image credit: LLDC, Allies & Morrison, Ninety90

WORLD-CLASS Education...

There are more highly-rated universities in London than any other city across the world.

Imperial College, University College London, King’s College London and London School of Economics are all ranked in the top 50 universities according to the QS World University Rankings in 2020, which also ranked London as the number one student city for the second year running. Despite the disruption of Covid-19, applications for UK universities had increased in 2020 compared to the previous year, with non-EU applicants seeing a significant increase of +10%. This shows that there will still be substantial student demand in London over the coming years.

QS Cities University rankings



Sources: QS World University Rankings 2020



“...at your fingertips”

University	Travel times	
	From West Ham station	
Queen Mary University of London	Mile End	6 mins
UEL University of East London	Cyprus DLR Station	11 mins
Cass Business School	Moorgate	18 mins
THE LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE	Holborn	18 mins
ual: university of the arts london	Holborn	18 mins
Goldsmiths UNIVERSITY OF LONDON	New Cross	20 mins
LONDON metropolitan university	Aldgate East	20 mins
KING'S College LONDON	Temple	22 mins
UNIVERSITY of GREENWICH	Cutty Sark	22 mins
LONDON SCHOOL of HYGIENE & TROPICAL MEDICINE	Goodge Street	29 mins
UCL	Euston Square	29 mins
UNIVERSITY OF WESTMINSTER	Goodge Street	29 mins
LONDON SOUTH BANK UNIVERSITY	Elephant & Castle	31 mins
CITY UNIVERSITY LONDON	Angel	35 mins
SOAS	Russell Square	39 mins
Imperial College London	South Kensington	43 mins

Journey times taken from 6:30am from West Ham Station to the nearest station to the University and are approximate only. Source: www.tfl.gov.uk

TwelveTrees Park is well located for primary and secondary schools as well as universities

Primary

School	Ofsted rating	Travel times
Star Primary	GOOD	1 min - DLR
Gainsborough Primary	GOOD	5 mins -
Manorfield Primary	OUTSTANDING	13 mins - Tube

Secondary

School	Ofsted rating	Travel times
Bow School	GOOD	4 mins - Tube
School 21	OUTSTANDING	7 mins - Tube
East London Science School	GOOD	9 mins - Tube

Independent Schools

School	Ofsted rating	Travel times
Faraday Prep School	OUTSTANDING	14 mins - Tube
Gatehouse School	n/a	26 mins - Tube
Dallington School	OUTSTANDING	28 mins - Tube

NEW and future institutions

Here East: has contributed to a buzzing student scene. Loughborough University, University College London and Staffordshire University all now have campuses at Here East at the Queen Elizabeth Olympic Park.

East Bank: a new powerhouse for innovation, creativity and learning, is taking shape in the Queen Elizabeth Olympic Park. Loughborough University London has already opened, with London College of Fashion and UCL to follow in 2022.

Poplar Works: A new space for fashion in East London, Poplar Works is a partnership between Poplar HARCA, London College of Fashion, UAL and The Trampery. Their goal is to help people and businesses reach their full potential in the fashion industry. There are over forty studios across their two sites, as well as training spaces, a small production unit and a café. All three organisations have worked together to bring something unique to the space.

ENTERTAINMENT *leisure & sport*

The Queen Elizabeth Olympic Park, where sporting history was made in 2012 at the London Olympics is now an exceptional public sports and leisure facility in Stratford. As well as treading in the footsteps of our greatest athletes, you can explore its parklands, waterways, playgrounds and cafés – or try the 178m slide, the world’s longest tunnel slide.



World-class culture

Sadler’s Wells will open a new **550-seat** theatre

English National Ballet - The new building for the English National Ballet will become a focal point for ballet in the Capital and on the world stage. It is the latest cultural centre to move east and will be joined by the London Film School.

The V&A East will create a new museum at Stratford Waterfront and a new collection and research centre at Here East comprising **250,000** objects and almost **1,000** archives.



“We are creating a global cultural powerhouse in East London”

Mayor Sadiq Khan

Hackman Capital Partners plan to build a **£300m** Hollywood-style production complex in Dagenham, with the first productions due to start filming by mid-2022. The studio is set to create an estimated **1,200** jobs and contribute **£35m** a year to the East London economy.



There are 250 shops – and a choice of 65 restaurants

Westfield Stratford City is one of the largest urban shopping and leisure destinations in Europe.

Many of the UK’s favourite high street fashion, home and lifestyle brands have a store here. There are 250 shops – and a choice of 65 restaurants, serving a wide range of international cuisine, to relax in after a day’s retail therapy. Leisure facilities include a 17-screen multiplex cinema, bowling alley and a 24-hour casino that claims to be the biggest in the UK.

Rolex, John Lewis, Apple, OMEGA, Pandora, M&S, Waitrose, Armani Exchange, Hugo Boss, Breitling, Calvin Klein, Coach, Disney Store, GAME, GANT, Guess, Holland & Barrett, Huawei, Kiehl’s, Lacoste, LEGO, Levi’s, Swarovski, The North Face, The White Company, Victoria’s Secret, Watches & Switzerland. Plus many more...



The O2

One of London’s premier sporting venues with a new high-end shopping outlet and 4d cinema. The O2 offers amazing possibilities for stand-out, ‘I was there’ experiences.

600+ of the best-known names in music have performed here to capacity crowds of **20,000**



HOUSING *potential*

With the increase in employment hubs, educational and cultural institutions, the demand for more housing in East London is increasing. And with attractive prices and some of the most rewarding yields in the Capital, it is clear to see why developers are choosing East London to create new homes.

Pricing increase forecast

	2021	2022	2023	2024	4 yr Compounded Growth
Savills	2.0%	3.0%	4.0%	1.5%	10.90%
Knight Frank	3.0%	4.0%	5.0%	4.0%	16.98%
JLL	0.0%	2.5%	5.0%	6.5%	14.62%

Rental growth (% pa)

	2021	2022	2023	2024	4 yr Compounded Growth
Savills	1.0%	4.5%	2.0%	3.0%	10.89%
Knight Frank	2.0%	2.0%	2.0%	2.0%	8.24%
JLL	-0.5%	2.5%	3.0%	3.0%	8.20%

These forecasts have been sought from independent sources to provide insight into property prices and the rental market. The information should be used for guidance only and it is recommended that personal research should be carried out prior to investing.

Yields and returns at TwelveTrees Park

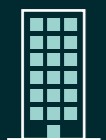
Apartment	12.06	13.03	14.01	20.07
Bedrooms	3	2	1	1 Bedroom Suite
Square Metres	94.6	82.6	57.3	44.2
Square Feet	1,018	889	616	476
Price (£)	£857,500	£730,000	£527,500	£480,000
£ Per Square Foot	£842	£821	£856	£1,008
Estimated Rental Value Per Week	£614	£500	£384	£346
Gross Yield	3.72%	3.56%	3.79%	3.75%

Estimated yields are based on a market value assessment. Values have been taken as an average from three estimates from JLL, Savills and Chase Evans. Please speak to a Sales Consultant for more information. Prices correct at time of publication.



Apartment mix Phase 1 at TwelveTrees Park

Studios



15%

1-Bed



42%

2-Bed

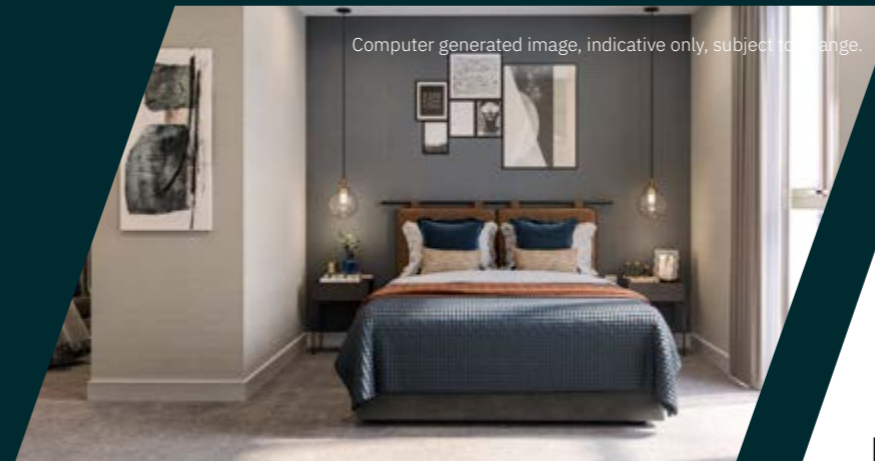


28%

3-Bed



15%



Capital Growth Per Borough

NEWHAM



Historic house growth over the last 10 years

Why buy at TwelveTrees Park

- Large regeneration scheme with over 3,800 homes in an area marked for growth.
- Located between Canary Wharf and Stratford.
- Ideally placed for commuting to the City.
- Rental yields expected to achieve 3%-4%.
- Strong demand from renters due to excellent transport links and the quality of a Berkeley home.
- One of the best connected developments in London, with five transport lines overlapping at West Ham.
- Twelve of the top 100 universities in the UK are within 30 minutes travel time from TwelveTrees Park.
- Three minutes by tube to Westfield Stratford and the Olympic Park, 13 minutes by tube to London Bridge, 22 minutes by tube to the West End.*
- 55% of the site is dedicated to open, green, landscaped gardens.
- WiFi-enabled 4.5 acre linear park.
- Resident facilities include a 24-hour concierge, gymnasium, residents' lobby, business lounge and screening room.

*Journey times taken from 6.30am and are approximate only. Source: www.tfl.gov.uk




3-4%
Rental yields expected



24
hour concierge, with outstanding resident facilities



12
of the top 100 universities in the UK within 30 minutes commute*



55%
of the site is dedicated to open, green, landscaped gardens



4.5 acre
WiFi-enabled linear park

Enhanced connectivity coming to West Ham Station

- New station entrance to West Ham Station due to open Q3 2023.
- The new entrance will be less than 1 minute from Evergreen Point, providing exceptionally quick journey times for residents.
- Enjoy a scenic stroll or cycle from TwelveTrees Park to Stratford along the Lea Valley Walk, part of London's National Cycle Route.
- Three new bridges being created within the development, linking the existing community to the new station entrance.

Computer generated image, indicative only, subject to change.



Computer generated image, indicative only, subject to change. *Accessible within 30 minutes.

CANARY WHARF

THE THAMES

TOWER BRIDGE

THE SHARD

THE LONDON EYE

EVERGREEN POINT

BARBICAN

WEST HAM STATION

With five major transport lines serving West Ham, TwelveTrees Park is exceptionally well connected to the rest of London and beyond



UNRIVALLED connections

From your doorstep to your destination in minutes.



Canary Wharf
7 Minutes



London City Airport
10 Minutes



Fenchurch Street
10 Minutes

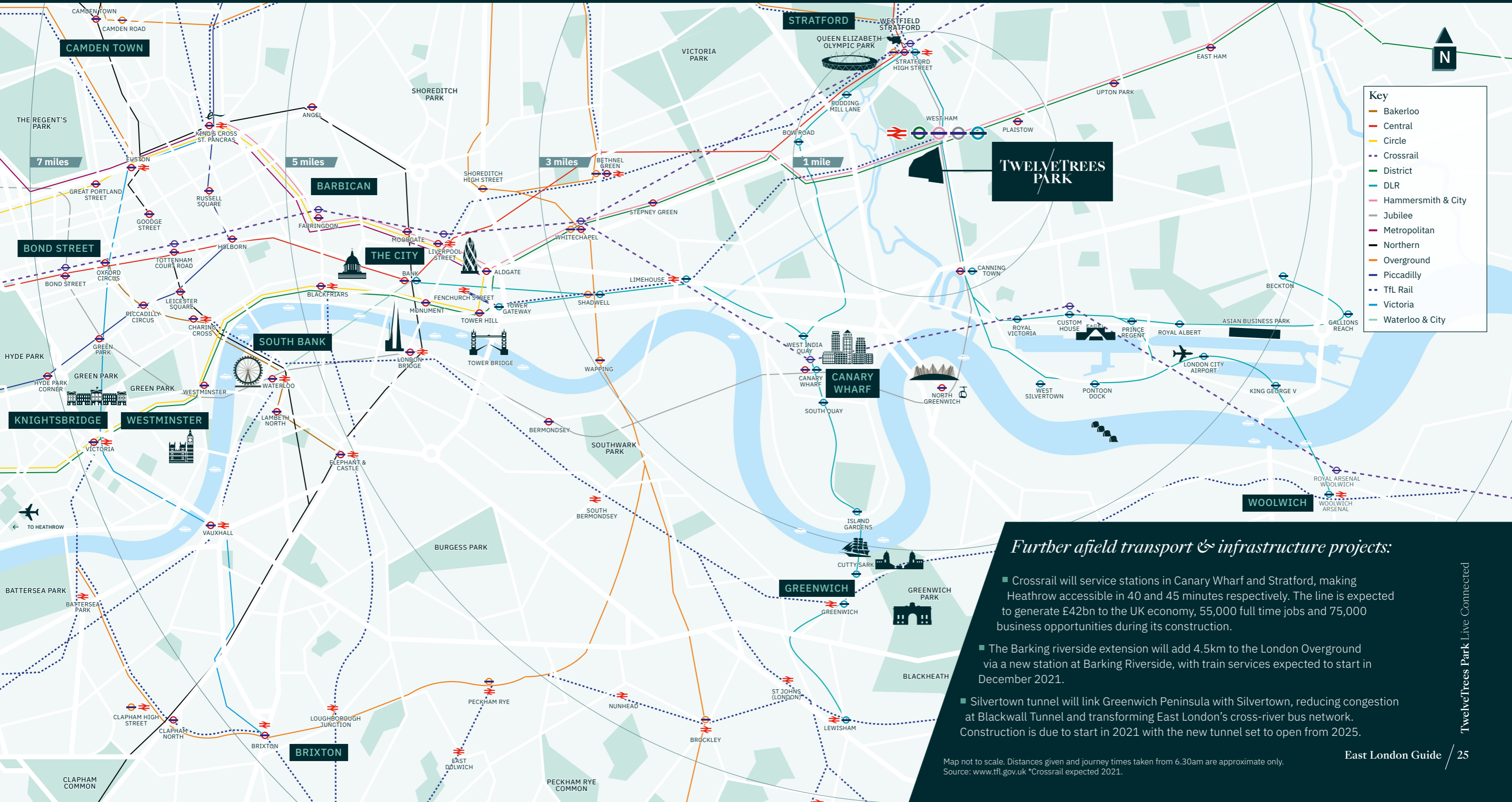


Monument (Bank)
16 Minutes



King's Cross
St Pancras
International
25 Minutes

Wherever you need to go in London, you can be there quickly from TwelveTrees Park – just take one of the five nearby rail and tube lines. It makes getting to work, university, school or a relaxing day out at the shops, so simple and convenient.



Further afield transport & infrastructure projects:

- Crossrail will service stations in Canary Wharf and Stratford, making Heathrow accessible in 40 and 45 minutes respectively. The line is expected to generate £42bn to the UK economy, 55,000 full time jobs and 75,000 business opportunities during its construction.
- The Barking riverside extension will add 4.5km to the London Overground via a new station at Barking Riverside, with train services expected to start in December 2021.
- Silvertown tunnel will link Greenwich Peninsula with Silvertown, reducing congestion at Blackwall Tunnel and transforming East London's cross-river bus network. Construction is due to start in 2021 with the new tunnel set to open from 2025.

Map not to scale. Distances given and journey times taken from 6.30am are approximate only. Source: www.tfl.gov.uk *Crossrail expected 2021.

WHY BUY *with Berkeley*

40+

years of experience and relentless passion for quality

60+

live developments across the UK

98%

of our customers would be happy to recommend us

We have built more than

19,600

homes in the last 5 years

We have a strong balance sheet with over

£2bn

of net assets, giving you peace of mind that your investment is secure

We have made a

£13.5bn

contribution to the UK economy over the last 5 years

We have the

highest

customer satisfaction score in our sector*

We became the UK's

1st

carbon positive homebuilder in 2018

Zero

the number of developments we have promised to deliver, but failed to do so**

*Sources based on the results of a customer survey by InHouse research.

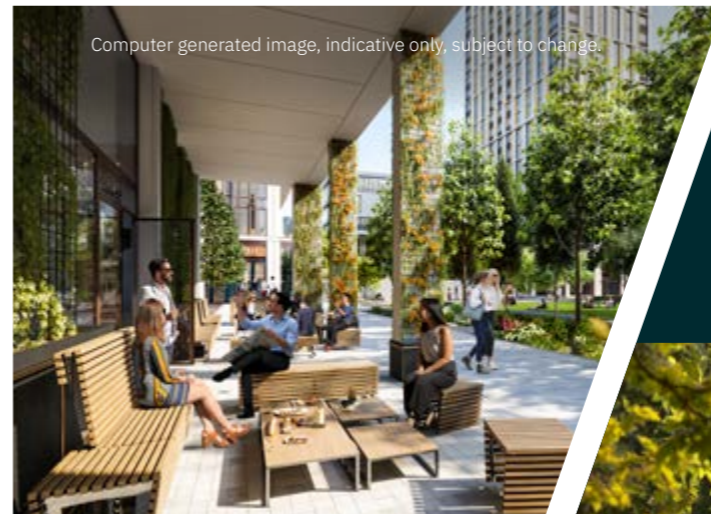
** Based on developments that we have had planning permission for, started to sell and started to build. Correct at time of print.



Proud to be a member of the Berkeley Group of companies



TwelveTrees Park is a marketing name and will not necessarily form part of the approved postal address. Applicants are advised to contact Berkeley to ascertain the availability of any particular property. Sold subject to planning permission. The information included in this guide has been collated from various reports and sources, including Savills and Experian and is correct at time of print (March 2021). This information should be used as a guide only and you should carry out your own research prior to making an investment. Berkeley does not accept any liability for individuals' investment decisions. Prices/details correct at time of going to print and subject to availability. 17/01847/OUT/0321



TWELVE TREES
PARK
LONDON E16

If you would like more information on TwelveTrees Park
and to discuss your next investment, please contact our
helpful and experienced Sales team

0203 944 9420