
CONSULTANCY & RESEARCH

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Consultancy and Research Group

Knight Frank is an independently owned real estate consultancy, operating globally and specialising locally, providing invaluable consultancy services to developers, international financial institutions, multinational companies, government authorities, and real estate companies in their real estate decision-making processes.

The Consultancy and Research Group operates locally from 413 offices across the globe, with four strategic hubs to facilitate international coordination: London, New York, Singapore and Dubai. Our teams work on a daily basis with sector experts around the world, giving our Clients access to up-to-date market intelligence and development opportunities in key global markets. Cross-departmental collaboration within Knight Frank also allows the Group to leverage on our global network for excellent information sharing to ensure Clients receive the best advice. We seek to build strong, lasting relationships with our Clients, providing consistently high levels of professional service and personalised advice.

Our expertise includes:

- Development consultancy
- Retail consultancy
- Corporate advisory
- Hospitality and leisure
- Market research report
- Public sector property
- Specialist property
- Geospatial research

In Knight Frank, we believe establishing good relationships based on trust and rapport is essential. The principal drivers of our success are our access to up-to-date market intelligence, the right Client base and a highly collaborative network of global teams.

We look forward to working with you.

418 OFFICES

60 COUNTRIES

The Americas

15 Countries

Argentina / Brazil
Canada / Chile / Colombia
Costa Rica / Dominican Republic
Mexico / Peru / Puerto Rico /
The Caribbean (4) / USA

169
OFFICES
5,475
PEOPLE

United Kingdom

85
OFFICES
2,145
PEOPLE

Continental Europe

16 Countries

Austria / Belgium / Cyprus
Czech Republic / France
Germany / Ireland / Italy / Monaco
The Netherlands / Poland / Portugal
Romania / Russia / Spain
Switzerland

80
OFFICES
1,035
PEOPLE

3
OFFICES
50
PEOPLE

23
OFFICES
700
PEOPLE

Africa

10 Countries

Botswana / Kenya / Malawi
Nigeria / Rwanda / South Africa
Tanzania / Uganda / Zambia
Zimbabwe

The Middle East

2 Countries

The Kingdom of Saudi Arabia
The United Arab Emirates

Asia Pacific

14 Countries

Australia / Cambodia
China / Hong Kong
India / Indonesia
Japan / Malaysia
New Zealand / Philippines
Singapore / South Korea
Taiwan / Thailand

58
OFFICES
5,615
PEOPLE

**OUR GLOBAL
NETWORK**

DEVELOPMENT CONSULTANCY

Knight Frank focuses on the challenges faced by developers looking to add value. The integrated approach of our teams, spanning the globe in Europe, Asia Pacific, Middle East, the Americas and Africa, combine local expertise with international standards to add value to the developer’s decision-making process. We review your development strategy to develop and implement commercially-viable real estate solutions that are optimised and perfectly aligned with your objectives.



Client: PT. Tirta Wahana Bali International
Location: Bali, Indonesia
Sector: Residential, Retail, Hospitality and Villa
Size: 1,400 hectares of land area

As part of a broad-based development consultancy, Knight Frank provided a detailed analysis of the residential, retail, hotel and villa markets in Indonesia and Bali. Combined with our research findings, the subsequent financial feasibility studies helped arrive at our suggested development options. Subsequently, expert opinions from the developer and building experts were consulted for the project conceptualisation stage.



Client: Malaysia-China Kuantan Industrial Park Sdn Bhd
Location: Kuantan, Malaysia
Sector: Industrial Park
Size: Provisional land area measuring 205 hectares

In line with the Belt and Road Initiative, the Malaysia-China Kuantan Industrial Park (MCKIP) is the first Malaysia National Industrial Park joint developed by both countries. Knight Frank conducted a comprehensive market feasibility study with the objective of assisting our Client to understand the industrial property market, potential development opportunities as well as the financial feasibility. The study also covered government incentives for industrial development and the overview of the regional economic corridors.

Client: Sino-Ocean Land
Location: Beijing, China
Sector: Office, Retail and Residential
Size: 200,000 sqm of GFA

With a skyscraper tower reaching a height of over 400 meters as the centrepiece, the developer sought optimal use for this land plot slated for a mixed-use development project in Beijing CBD. Knight Frank provided market research, supply demand analysis for the office, retail and residential segments in Beijing’s urban area. Subsequently, development options were proposed along with the relevant financial feasibility study. Knight Frank also consulted with the architect and the developer in conceptualising the proposed development.



Client: Shanghai Industrial Investment Co. Ltd.
Location: Quanzhou, China
Sector: Office, Retail, Residential and Hospitality
Size: 1,610,000 sqm of GFA

Knight Frank was instructed to provide development consultancy including market research and an analysis of supply and demand dynamics for the office, retail, hotel and residential segments in Quanzhou. The study then provided development recommendations and the relevant broad-based financial feasibility study. Knight Frank then worked alongside the architect and the developer to help conceptualise the development to maximise the marketability of the project.



RETAIL CONSULTANCY

Knight Frank possess extensive experience and in-depth, broad-based expertise of the retail industry including high streets, shopping centres, out-of-town and food stores. We provide professional leasing advice, property management, tenant fit-out co-ordination, valuations, acquisition and divestment strategies to international retailers, investors and property developers.

Client: Foot Locker
Location: Taiwan
Sector: Retail

Knight Frank was tasked to perform indepth market research on the Taiwanese retail market, which also include analysis on economy, demography, infrastructure and other related sectors. A competitor analysis was also done for the Client on the real estate strategies of its major sportswear competitors. Moreover, the team advised on the rental structure, operating and capital expenses of starting and operating sportswear retail in Taiwan. Subsequently, the Client discovered its niche and revised its business and market entry strategies.



Client: Parkson Holdings Berhad
Location: Phnom Penh, Cambodia
Sector: Retail
Size: 45,000 sq m

To optimise the potential and marketability of the subject site, Knight Frank undertook a thorough site evaluation along with market research, including an analysis of the current socioeconomic and demographics of the trade area, an overview of the retail sector and a competitive development study. The study then provided recommendations regarding the development concept, market positioning, ideal retail trade mix and the identification of opportunities as well as risks of the proposed development.

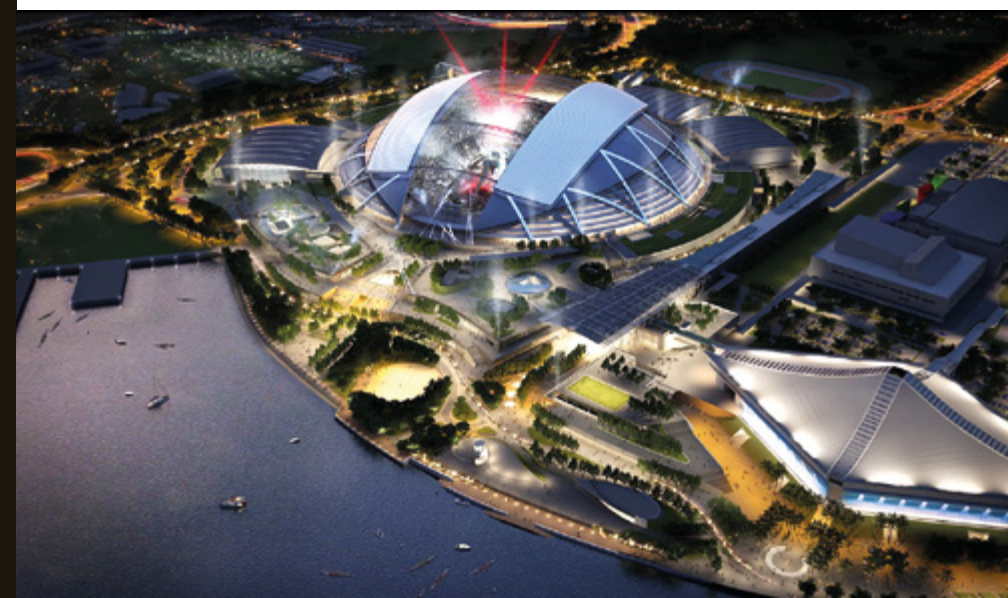


Client: AECOM
Location: Tsim Sha Tsui West, Causeway Bay, Happy Valley, Admiralty, Wanchai, Hong Kong
Sector: Retail
Size: 250 hectares of study area

To assist our Client who is the leading consultant of the Hong Kong SAR Government, Knight Frank performed a baseline profile review of the study area including the existing land use pattern, land ownership pattern, committed or planned uses or infrastructures. Knight Frank also conducted market research of the retail sector to support the financial viability analysis. Additionally, the study also included planning, financial and technical assessments of the pilot study on underground space development in Hong Kong.

Client: Singapore Sports Hub
Location: Singapore
Sector: Shopping Mall
Size: 35 hectares of land area, 40,000 sq m of GDA

Leveraging on our extensive local and international network of potential investors during the market sounding process, Knight Frank was engaged to source for a master operator for the mall at the Hub. The study offered evaluation and recommendation on the ideal master operator business and leasing model for the Hub, which was supported by a comprehensive retail market research report. Via tender, Knight Frank engaged and negotiated with various interested parties and made recommendations on the ideal partner as the master operator of the mall.



CORPORATE ADVISORY

Corporates with multiple real estate holdings - those who rent or own property in multiple locations can often face challenges in dealing with real estate matters. When real estate is not your core business, this can be a distraction, and this is where Knight Frank can assist. We provide advice that improves business productivity and a sound financial outcome for business owners or shareholders.



Client: An international financial institution
Location: 14 locations across Asia Pacific
Sector: International Financial Institutions – Office

Knight Frank was tasked to conduct a cost-benefit study of rent, buy or build options for the Client's offices in 14 locations across Asia Pacific. Firstly, the study provided a structured overview assessing the commercial property market around the CBD; secondly, options and directions were suggested on whether to rent, buy, or build an office building based on the qualitative and quantitative inputs; thirdly, the exercise identified alternate locations to host staff in the event of disruptions at headquarters. Additionally, a comparison study of other international financial institutions was also conducted for benchmarking purposes.

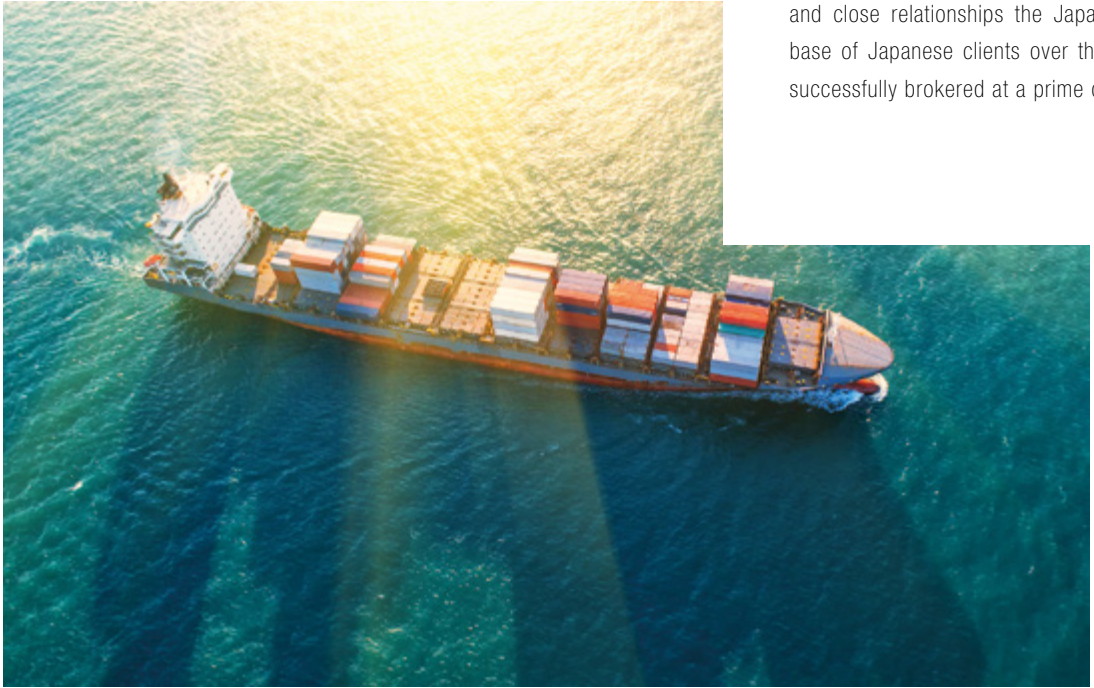


Client: Shell Malaysia
Location: Kuala Lumpur, Malaysia
Sector: Oil and Gas – Office

A thorough study was performed with the objective of sourcing potential office spaces for the Client's shared services operation in Malaysia. The scope of work included analysing the Client's requirement, reviewing the office market in the subject area, identifying the potential office locations and buildings, evaluating the nominated office buildings and providing final recommendations to facilitate the real estate decision-making process for the Client.

Client: Joint venture of Japan's
'Big Three' shipping lines
Location: Singapore
Sector: Shipping – Office

With the assistance of our Japanese strategic partner Sumitomo Mitsui Trust Bank, invaluable market insights and localised occupier analysis of targeted CBD office spaces was provided to the Japanese Client who was looking to set up its regional and global headquarters in Singapore. Leveraging on the goodwill and close relationships the Japan Desk cultivated with its vast base of Japanese clients over the years, a long-term lease was successfully brokered at a prime office building in Singapore.



Client: Campari
Location: Singapore, Kuala Lumpur, Bangkok, Taipei, Shanghai and Hong Kong
Sector: Beverage – Office

The Client required a full understanding of selected Asia-Pacific office markets to aid selection process for their regional corporate headquarters. Knight Frank provided research and analysis of prime and secondary office rental markets across the Asia-Pacific region, focusing on Singapore, Kuala Lumpur, Bangkok, Taipei, Shanghai and Hong Kong. Full occupancy cost analysis of a hypothetical requirement was provided, including a review of labour and housing (residential) costs.

HOSPITALITY
& LEISURE

Acting on behalf of hotel and leisure property developers, Knight Frank provides timely, accurate and professional market feasibility studies including market analysis, due diligence and financing. As we operate across all real estate sectors and services, we are able to provide impartial and comprehensive advice that is tailored specifically for your development.



Client: Grand Lion Group Co., Ltd.
Location: Sihanoukville, Cambodia
Sector: Hospitality
Land size: 30,000 sq m of GFA

A Marriott-branded, 5-star hotel appointed Knight Frank to undertake a feasibility study to evaluate its development which also comprises a luxury retail podium and beach club. In addition to providing detailed market research on the Cambodian and Sihanoukville tourism, hospitality and retail sectors, the study also advised on the recommended scale, room configuration and sizes, market positioning and projected room rates. Following this, a full financial analysis was provided to enable the Client to obtain funding.

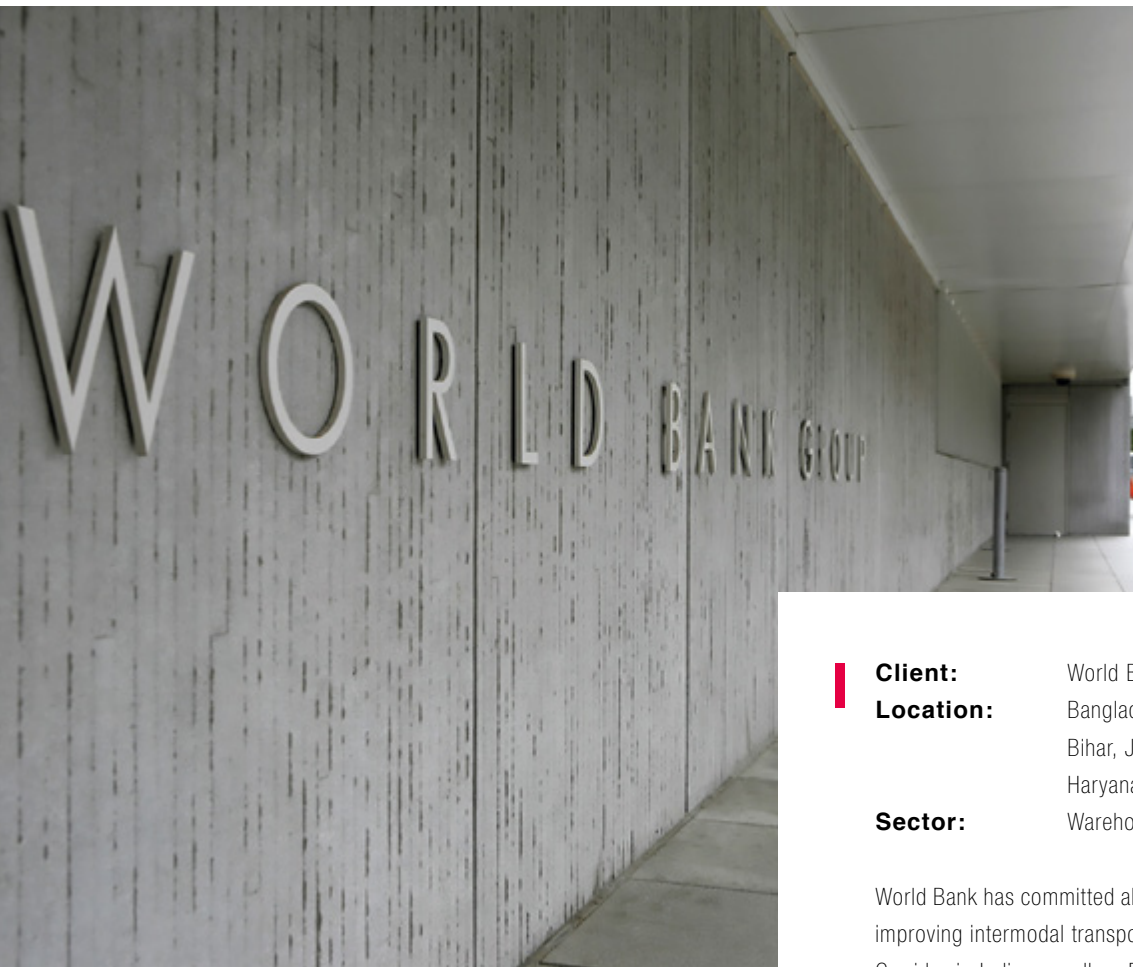


Client: Saudi Arabia
Location: Riyadh, Saudi Arabia
Property type: Entertainment city with Theme Parks, Sports, Cultural and Recreational Facilities, Resorts, Hotels, Residential and Retail
Size: 334 sq km of land area and 14 million sq m of built-up area

Knight Frank conducted market research to identify demand generators, target customers based on income brackets, travel behaviour, and differences in demographics to formulate a development strategy for an entertainment city roughly the size of Las Vegas. The team prepared a development program and recommended on a suitable phasing strategy for all the relevant sectors. The strategy also included the development of a township for an onsite population supporting the project including residential, retail, healthcare, education and other supporting facilities.

MARKET RESEARCH REPORT

As competition intensifies and challenges remain across markets, it is crucial to understand the underlying market dynamics and emerging demand trends. To facilitate this, Knight Frank Consultancy and Research Group offers in-depth market research in key markets across the world to ensure our Clients and their portfolios as well as investment objectives are in the strongest position possible.



Client: World Bank
Location: Bangladesh and India (West Bengal, Bihar, Jharkhand, Uttar Pradesh, Haryana and Punjab)
Sector: Warehousing and logistics facilities

World Bank has committed about US\$10 billion investments to improving intermodal transport and logistics along the Eastern Corridor in India as well as Bangladesh. To better understand the warehousing market in the relevant Indian states along the corridor, Knight Frank was appointed to conduct an in-depth study, which includes analysis of the distribution model of various user commodities, a review of the regulatory environment, identification of future potential locations and financial return analysis on behalf of private sector as well as relevant policy recommendations to the various state actors.



Client: Land Securities
Location: Multiple locations across London
Sector: Residential

The problem posed by the Client was that they found the ebb and flow of the London residential market relatively unpredictable compared to the commercial sector. Knight Frank demonstrated, at a localised level, that residential market performance could be both understood and anticipated. Thanks to our in-depth spatial and temporal performance analysis of the London market, the Client was able to identify a number of assets that could be immediately prioritised for redevelopment, and which could be retained or mothballed until local market conditions improved.

“

“In scoping the piece of research in question we found Knight Frank’s unilateral understanding of and willingness to engage with what we were trying to do to be head and shoulders above the competition. Not only have they been able to answer the questions we thought we wanted to ask, they’ve also helped identify other relevant questions to ask. On a personal level, they are great guys, have patience for our queries and never make a non-statistician feel like a chimp. We have no hesitation in recommending them.”

Nick Corbyn

Retail Director at Land Securities



Client: Mitsubishi Corporation
Location: Korea
Sector: Office, Retail, Logistics, Industrial, Infrastructure and Hospitality

Knight Frank was instructed to conduct a comprehensive research on the South Korean real estate market, covering office, retail, logistics, industrial, infrastructure and hospitality. There was also a study on alternative investment market entry strategy including a review of all real estate investment vehicles available and competitor analysis in South Korea. Subsequently, a suggestion was made as to the most optimal investment sector and entry strategy in preparation for the Client's in-market launch of an alternative investment subsidiary.

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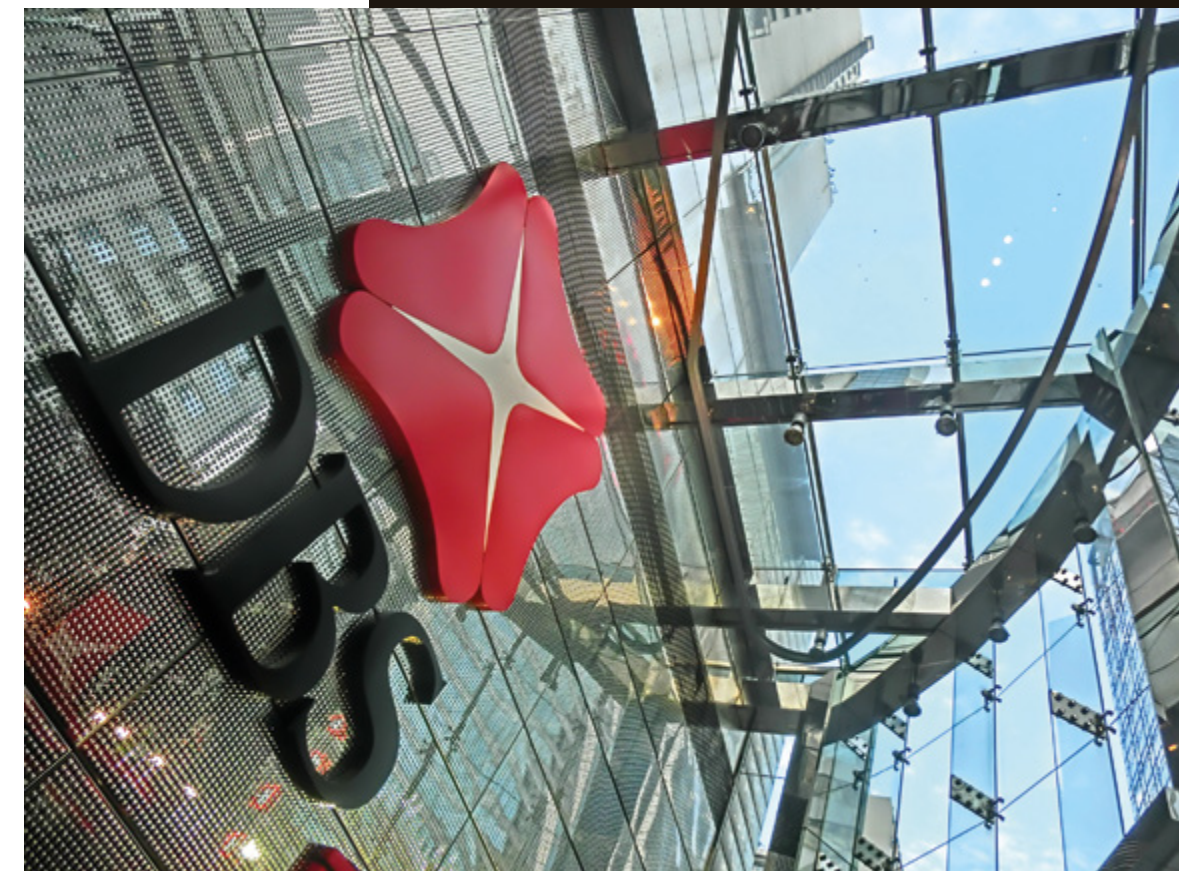
"Masdar has worked with Knight Frank's professional services team on numerous occasions over a period of more than three years on numerous assignments in Abu Dhabi, and more specifically within its master development known as Masdar City. We can assure you that we have always been very satisfied by their work and their level of client care and attention to detail. We have no hesitation to recommend the services of Knight Frank and we look forward to working with them again."

Niall Hannigan

Chief Financial Officer for Abu Dhabi
Future Energy Company (Masdar)

Client: Ascendas
Location: Sydney, Melbourne, Tokyo, Shanghai, Seoul and Singapore
Sector: Office

Knight Frank was instructed to provide detailed analysis and forecasts for six gateway Asia-Pacific cities. The study was divided into three sections: firstly, the economy, financial and credit markets focusing on their dynamics with office markets; secondly, in-depth analysis of the office markets in each city including supply-demand analysis and overall performance of its occupier and investment markets; the third section emphasised on detailed analysis of office investment market activities. Structured research was performed from macro-level to city-level submarket to help our Client make informed market entry and exit strategies.



Client: DBS Bank
Location: Sydney, Melbourne, Perth, Tokyo, New York, Los Angeles and San Francisco
Sector: Residential

Focusing on the OECD housing markets, the Client instructed Knight Frank to advise on global residential trends including price trends over the last property cycle. Covering the US, Canada, Europe, Australia, New Zealand, Japan, the study included a comprehensive national residential market overview for each of Australia, Japan and the US. This overview included national house price trends, commentary on key drivers in the market to date and forecast view over the next two years and an outline of regulations for foreign purchasers.



Client: Government of Taiwan
Location: Taiwan
Sector: Industrial Parks

Funded by the Industrial Development Bureau, Ministry of Economic Affairs in Taiwan, REPro Knight Frank was appointed to evaluate the marketability of government developed industrial parks and their market rents as well as capital values. The study also provided advice and assistance for the government to revise the pricing of land parcels in the industrial parks.

PUBLIC SECTOR PROPERTY

Maximising efficiencies, reducing revenue costs and generating income from public sector property are key tasks for any government. To help identify such opportunities, Knight Frank provides comprehensive strategic and project management support that covers all areas of property valuation, market research, acquisition, ownership and development that relate to public sector property.

Client: Australian Trade and Investment Commission
Location: Australia
Property type: Purpose-Built Student Accommodation (PBSA)

The Australian government appointed Knight Frank to study the Australian PBSA primarily focusing on the supply-demand dynamics as well as investment opportunities in the sector. The main objective of the project was to understand whether there is a gap in the market between the number of students studying in Australia and the accommodation available to house these students. Furthermore, the aim of the project was to identify such barriers for growth in the industry and to identify opportunities for private sector engagement.



Client: Government of Dubai
Location: Dubai, United Arab Emirates
Sector: Residential, Hospitality, Office, Retail, Leisure and Entertainment Facilities

Union Oasis is a transport-oriented development led by the local government as part of an effort to revitalise Dubai's Old Town. As the strategic consultant, Knight Frank delivered market research on all the relevant sectors, conducted a global benchmarking of transport-oriented developments, and assessed the financial feasibility of the project and its components, which resulted in strategic development recommendations on the sizing and positioning of the project.

Client: West Kowloon Cultural District Authority
Location: West Kowloon, Hong Kong
Sector: Public Infrastructure

The West Kowloon Cultural District will be developed into one of the world's largest cultural quarters, blending art, education and public spaces. Knight Frank has been providing consultancy and research services to the authority since 2006, including reviewing the overall financial position of the project and providing valuation, land administrative and development advice.





Client: Campus Living Villages (CLV)
Location: UK
Property type: Purpose-Built Student Accommodation
Size: A portfolio of 8 properties with 4,539 bedspaces

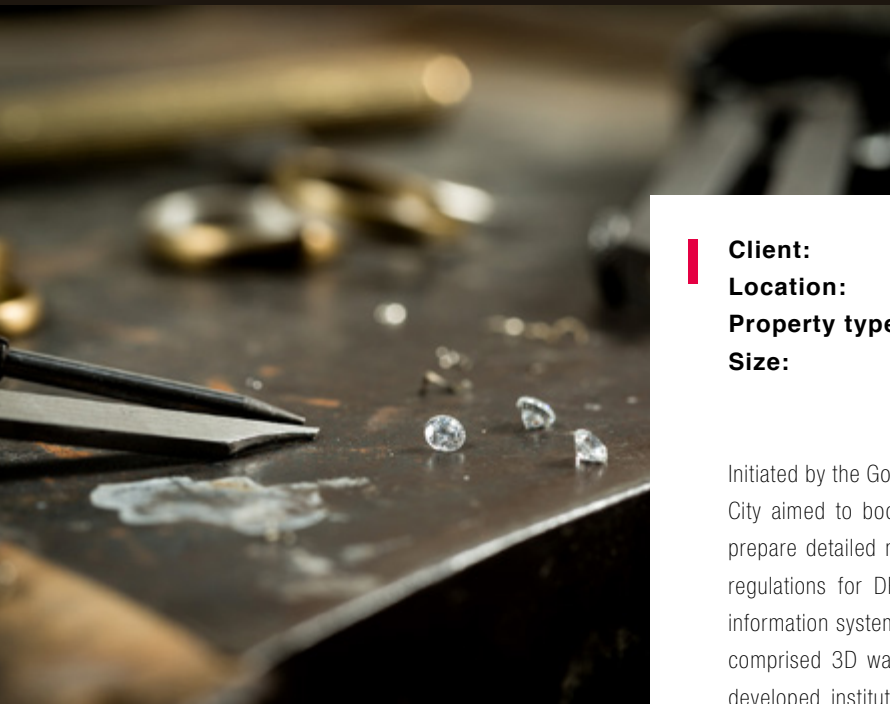
As part of their due diligence to acquire a portfolio of eight PBSA assets across seven UK cities, CLV instructed Knight Frank to provide a comprehensive analysis of the student housing markets in seven cities. The report analysed the existing and future supply of student housing in each market, together with detailed appraisal of the demographics of the student population, demand drivers, trends in student volumes, affordability and the availability of alternative accommodation.

SPECIALIST PROPERTY

Knight Frank Specialist Property Group covers consultancy in the Automotive Property, Energy, Hotels, Healthcare and Student Property sectors. The group provides a full menu of expert knowledge including business valuations, transactions, sale & leaseback, development, landlord & tenant and research on every type of asset and registration type within the relevant sectors.

Client: QIC Global Infrastructure
Location: Australia
Sector: Port

Knight Frank was tasked to assess market demand for three separate major state government divestments of port and non-port related lands, namely Brisbane Port, Botany/Kembla Ports and Newcastle Port. During the bidding process, various detailed analyses were provided such as a high-level red flag report based on the Information Memorandum provided to us and a high-level analysis of industrial land demand and supply across the local region. A study on the market rental levels also helped place relevant market parameters in context with the subject sites.



Client: Government of Gujarat, India
Location: Surat, India
Property type: Business District
Size: 562 hectares of government land and 120 hectares of private land

Initiated by the Government of Gujarat, Diamond Research and Mercantile (DREAM) City aimed to boost the diamond trade in Surat. Knight Frank was appointed to prepare detailed master plan, design guidelines and general development control regulations for DREAM City. The scope included producing a base geographic information system (GIS) platform map for use as a Smart City master place which comprised 3D walkthrough and a working model. Additionally, Knight Frank also developed institutional structure for special purpose vehicle and worked closely with the project management unit to ensure the success of DREAM City.

GEOSPATIAL RESEARCH

Knight Frank's award-winning Geospatial Team provides location planning expertise as a specialisation within residential and commercial development consultancy. In determining locations suitable for your business, our team will cover a range of operational factors relevant to your organisation, including service distribution and coverage, target market demographics, and key dependencies such as staff commuting times.

Client: London Ambulance Service (LAS)
Location: London, UK
Property type: Public property

The LAS needed to identify site acquisition opportunities in support of a portfolio-wide rationalisation exercise to obtain larger consolidated sites as operational hubs to offset the closure of small inefficient sites. Knight Frank incorporated several custom-built London-wide GIS databases to complete the site identification. By cross-referencing land protected for industrial use in the London Plan against Land Registry parcels known to be in public sector ownership, it was possible to identify sites within the relevant search areas that fulfilled all of the initial requirements. A final site ranking was performed in relation to time and distance to hospitals, and ease of commute for LAS employees.



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CONNECTING PEOPLE
& PROPERTY, PERFECTLY.



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