

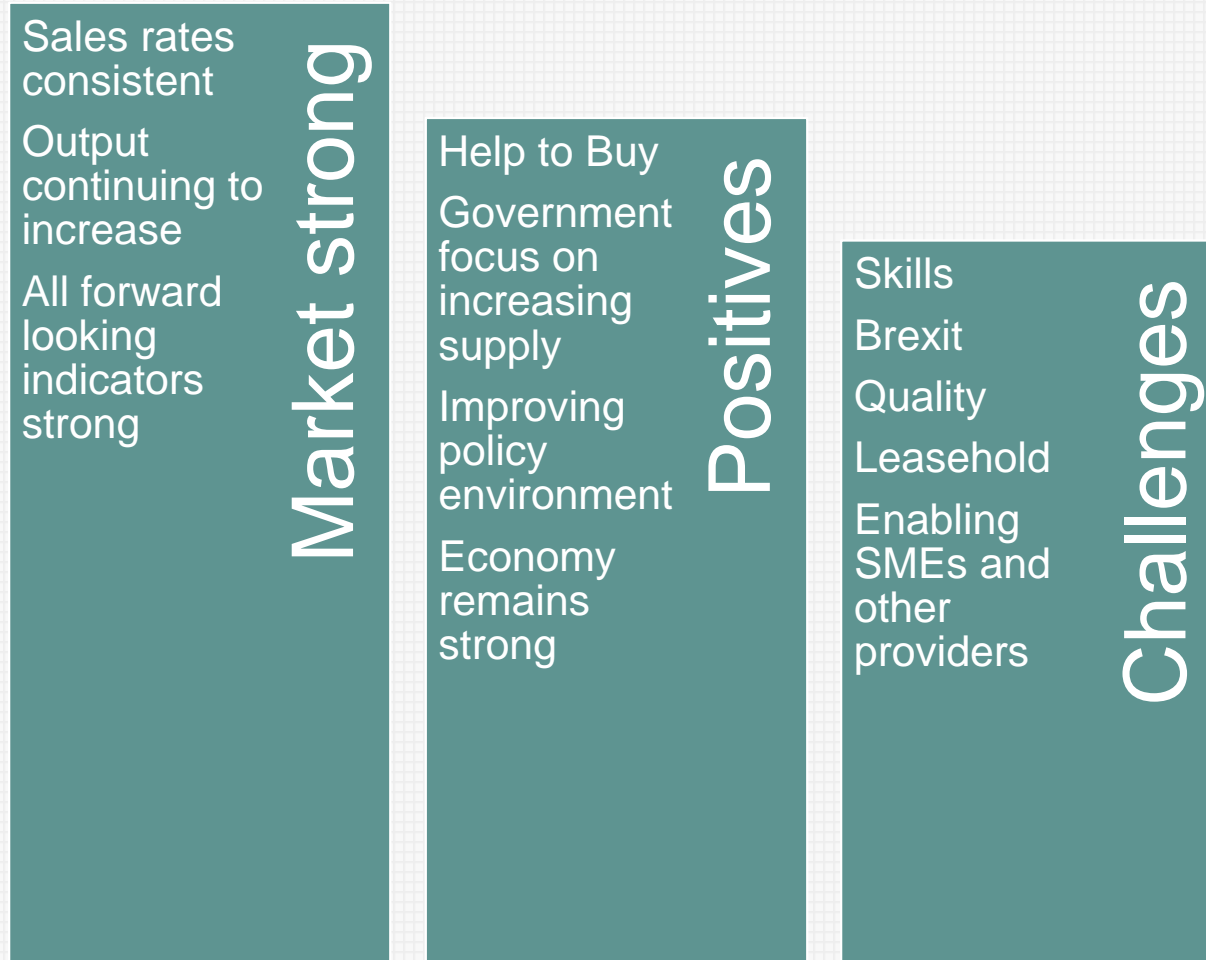
# Stewart Baseley

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Housing Market Intelligence  
October 5, 2017

# Current position - Brexit dominating but spotlight on housing

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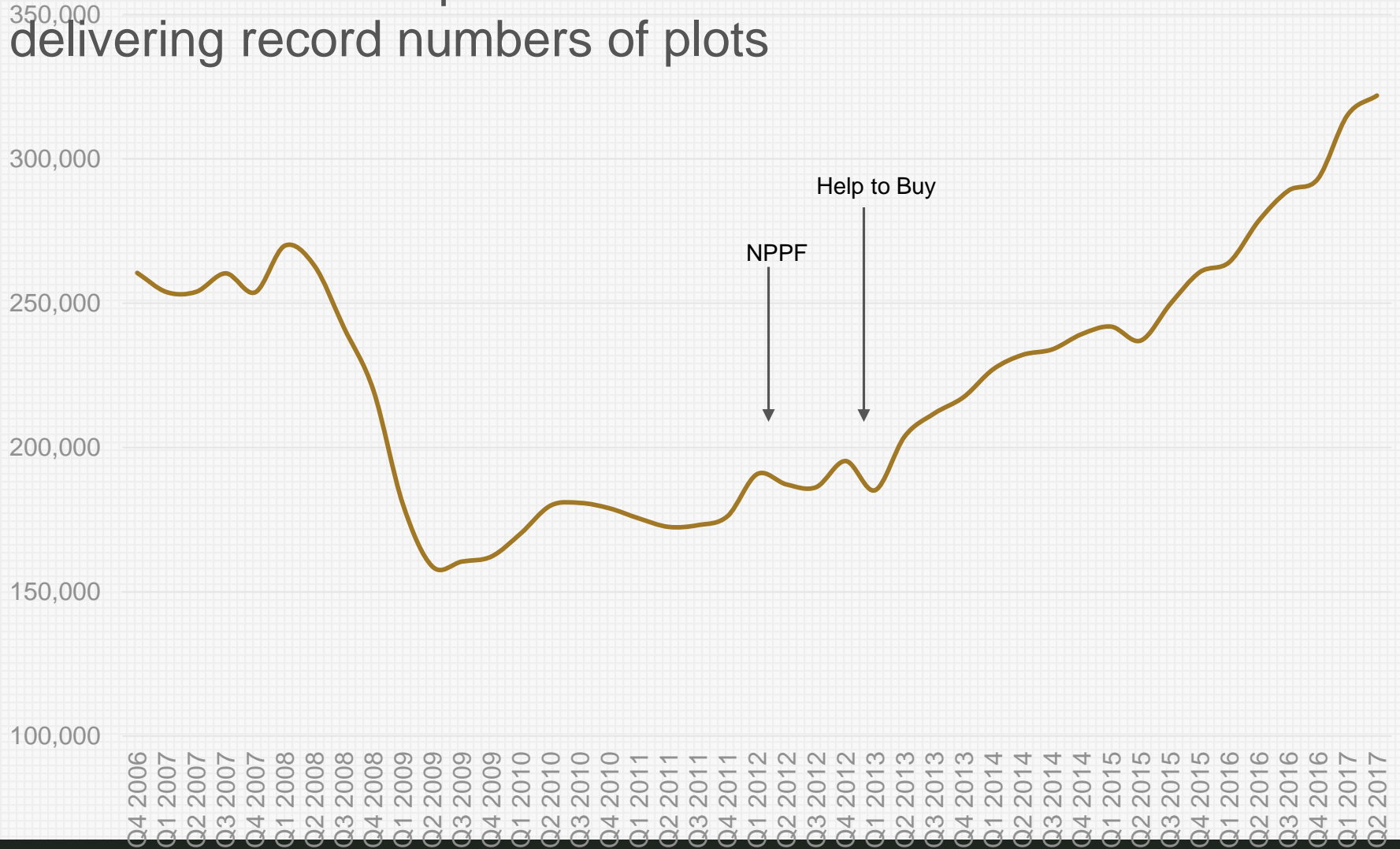


# Output continuing to increase

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# Forward indicators point to further increases – NPPF is delivering record numbers of plots



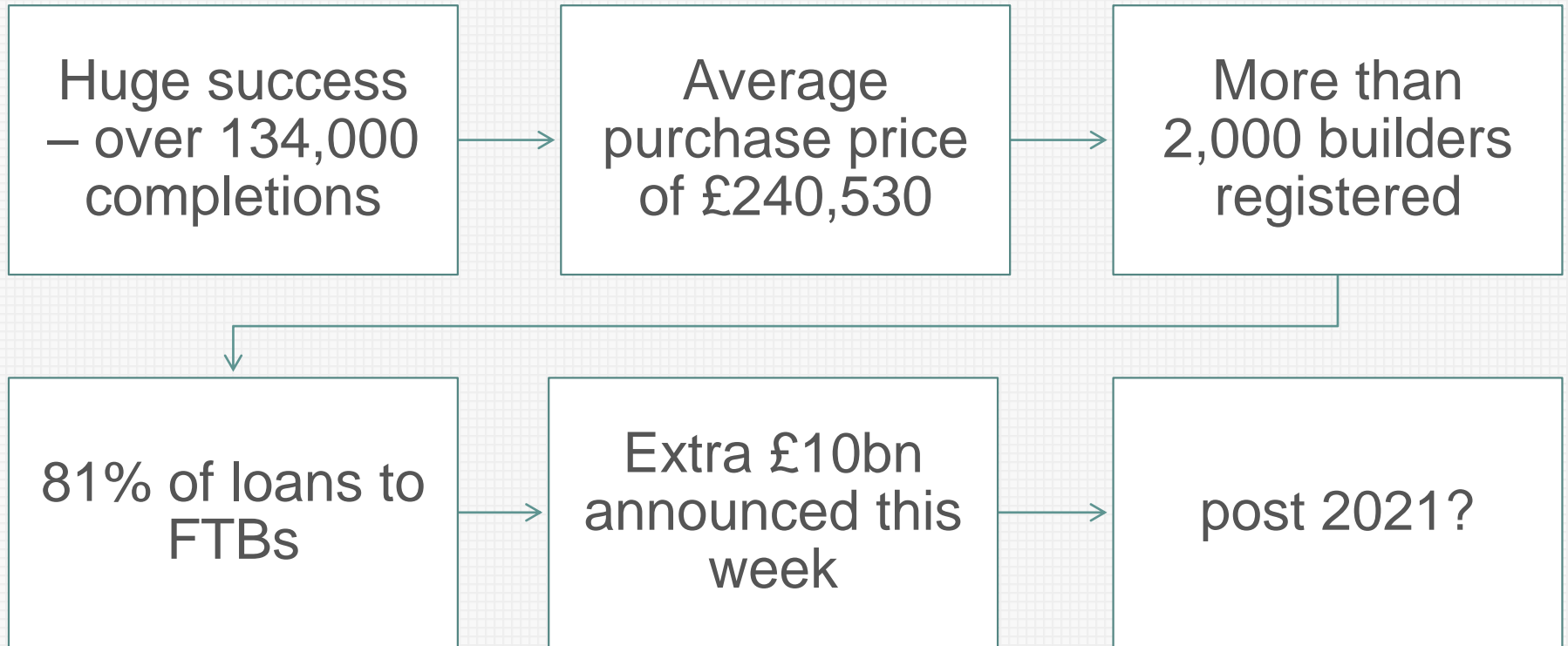
# Government committed to increasing supply

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- Policy environment remains favourable
- Clear determination from PM down to deliver more homes
- Commitment that Help to Buy will continue until at least 2021
- White Paper contains positive package of measures
- Ministers keen to engage with HBF and industry – but reputational issues on the agenda

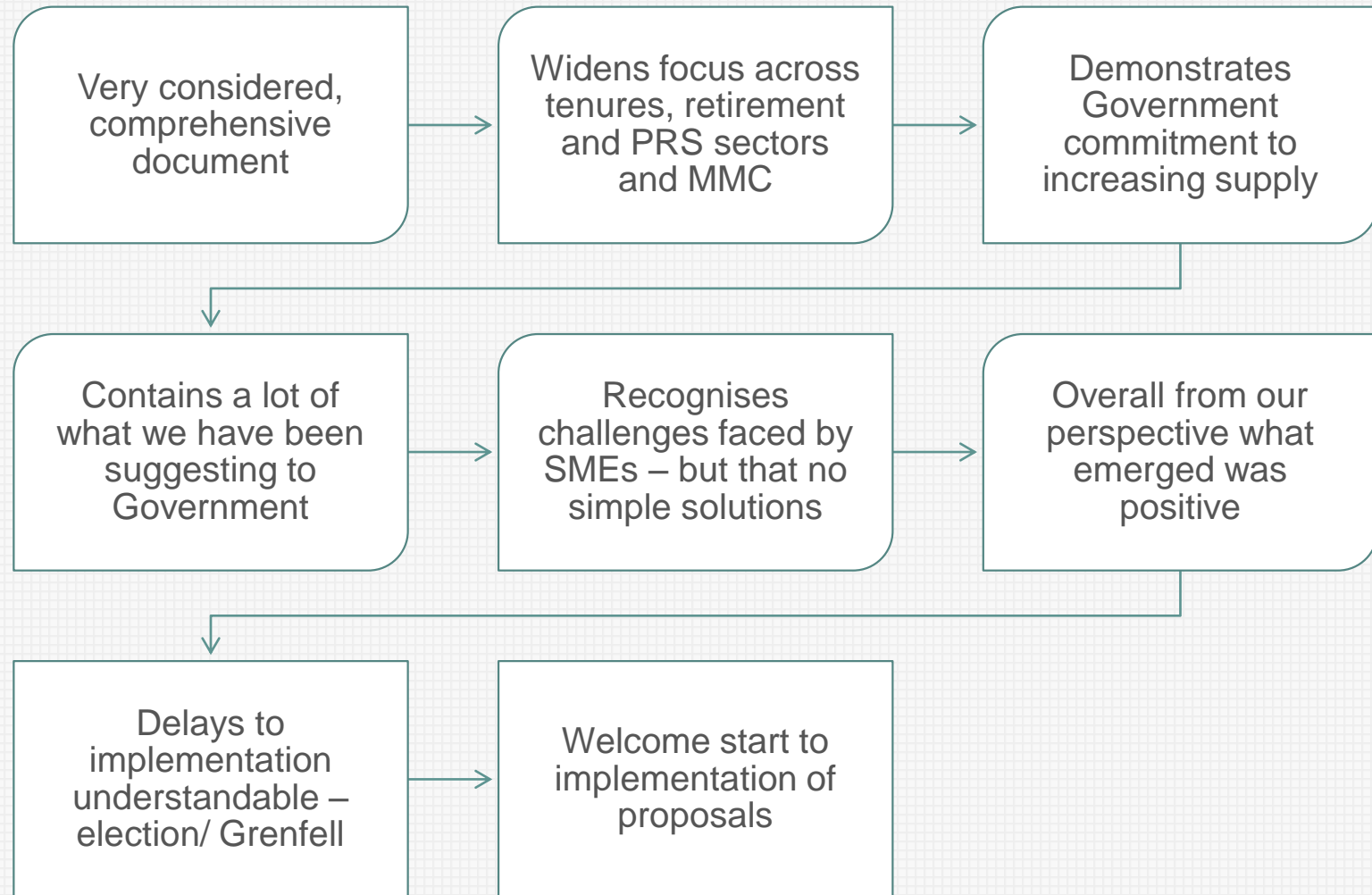
# Help to Buy

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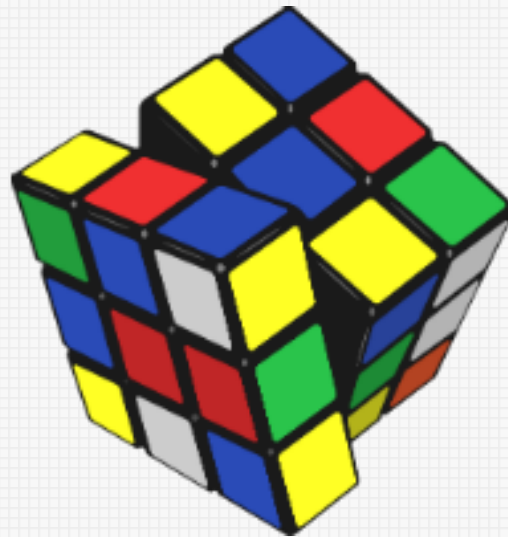


# White paper builds on policy framework

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# KEY CHALLENGES



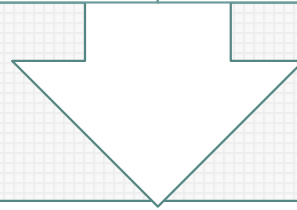


# Skills

## CITB

Overwhelming 'no' vote  
culmination of years of frustration

Hopefully vote will lead to change  
and more positive relationship



## Home Building Skills Partnership

Already starting to  
deliver

Pledge launched  
today – SIGN UP!

Demonstrates what  
can be achieved  
working together

# Brexit

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## Labour issue absolutely key priority

- Need to convince Government housebuilding is 'special case'
- census will provide evidence based position

## Future regulatory framework

- opportunity to improve current / reduce unnecessary regulation

## Potential impact of import tariffs on materials

- looking at implications, thus far seems minimal

# HBF's Quality Working Group

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Workstreams developed to address all recommendations made by the APPG including;

Independent review commissioned re calls for an Ombudsman

- recommends creation of stronger, more independent body with broader remit

Pushing Government to introduce minimum warranty standards

Developing guidance on Customer Information Packs

Looking to produce a standard sales contracts

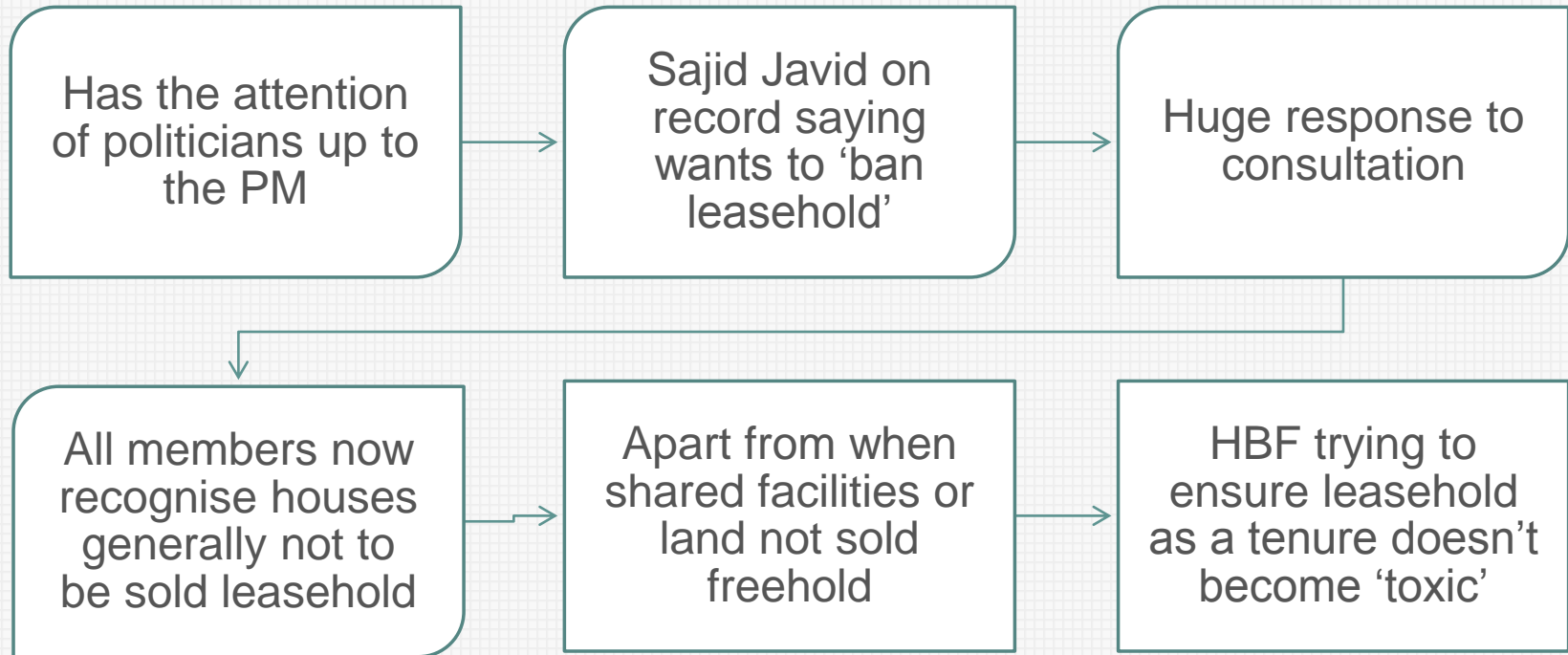
Working with lenders/ warranty providers to improve 'CML sign off' process

Undertaken review of Customer Satisfaction Survey

Producing new industry 'charter'

# Leasehold

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# Prioritising other areas of supply is key – retirement housing sector

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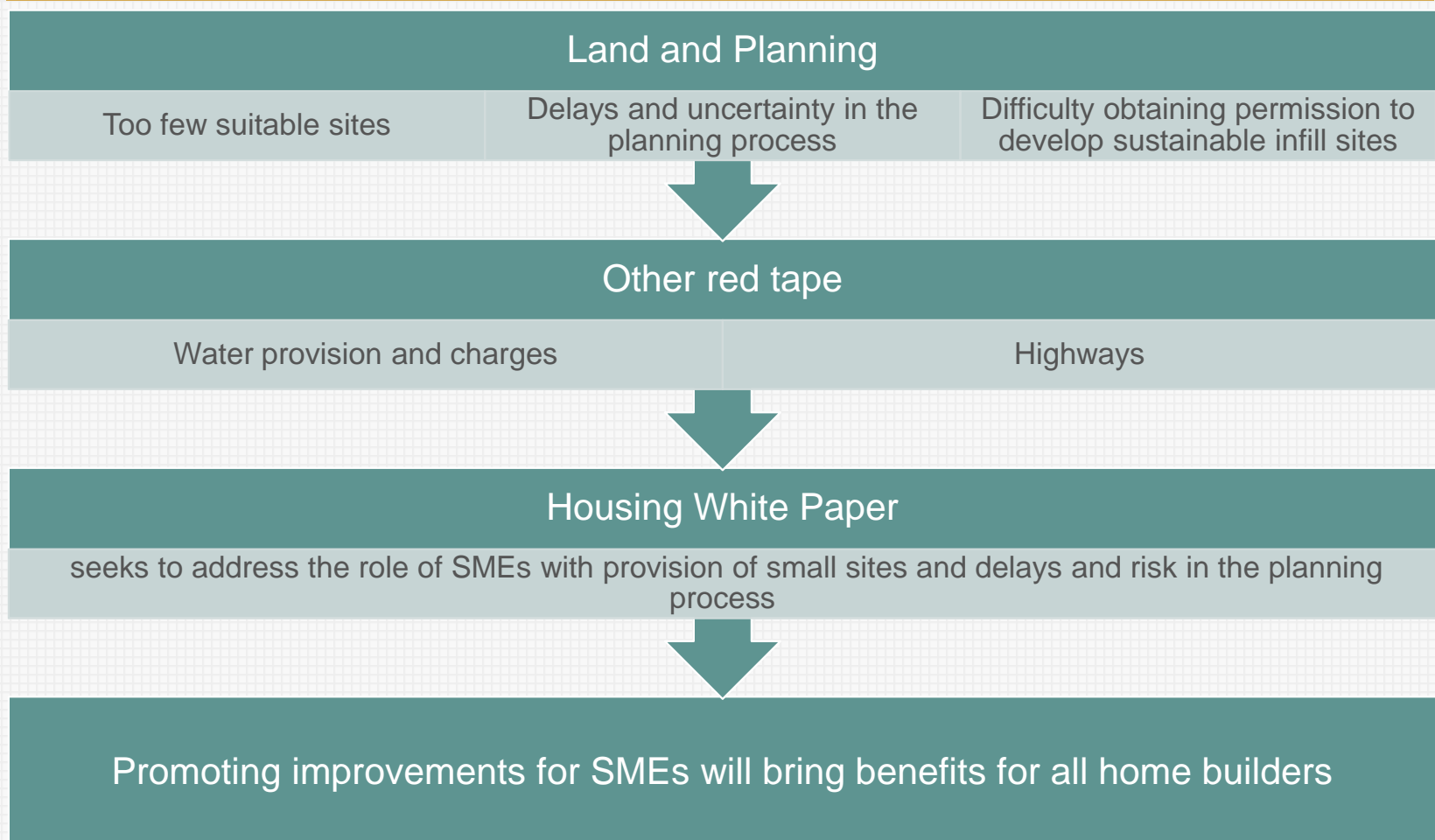
3.5m over 60s  
1 in 4 of  
population

- 35% over 60s interested in moving and 33% in downsizing
- Less than 150,000 private retirement properties in England
- Currently building C5,000 a year
- Estimated demand C30,000 a year

Need supply  
and demand  
side action:

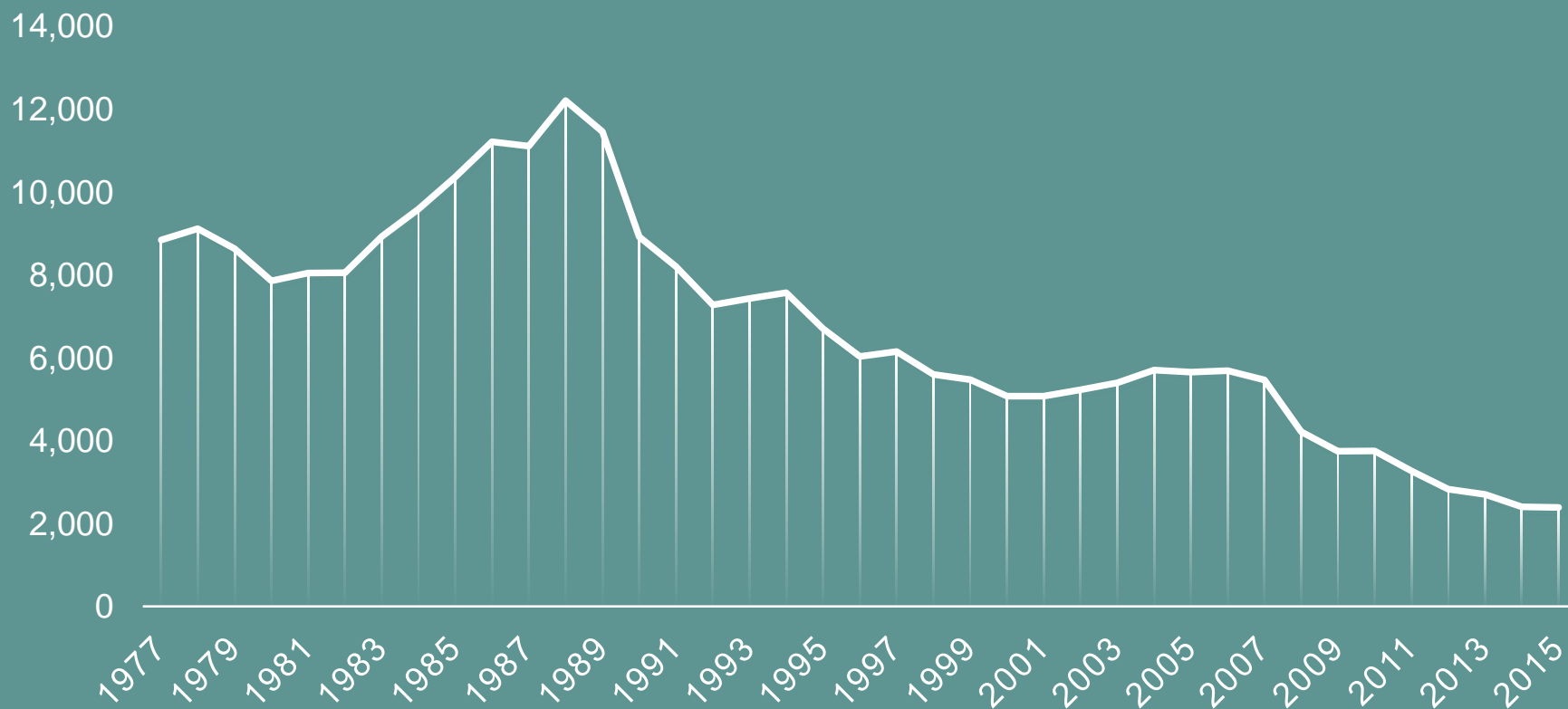
- HBF inputting to drafting of new SoS planning guidance on retirement development
- Working on ideas for supply and demand side incentives - new report on this soon
- Improving supply will free up family housing and bring big health and care benefits

# Prioritising other areas of supply is key – SMEs



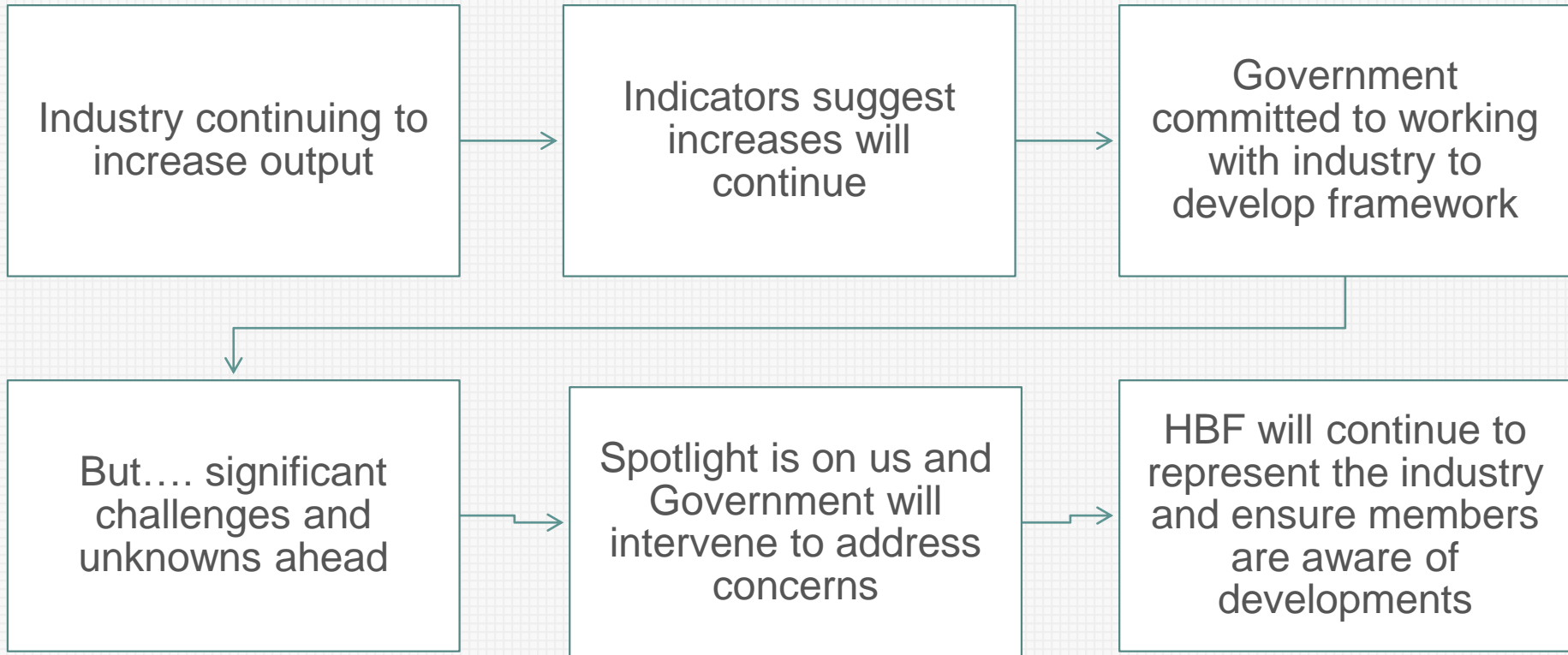
‘Returning to 2007 levels of SMEs could help produce 25,000 more new homes per year’  
(*Reversing the Decline of Small Housebuilders, HBF*)

## SME HOUSE BUILDERS, 1977 TO 2015 (1-100 UNITS) (NHBC)



# Summary

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*The voice of the  
home building  
industry*