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HOUSING MARKET INTELLIGENCE 2023

CONFERENCE AND ANNUAL REPORT LAUNCH

5 OCTOBER 2023
SAVOY PLACE, LONDON

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9.00	Registration & Networking Breakfast
10.00	<i>Chair's Welcome</i> Justin Webb Journalist and Author
10.05	Stewart Baseley Executive Chairman HBF
10.25	Rachel Maclean MP Minister of State for Housing and Planning
10.45	Jennie Daly CEO Taylor Wimpey
11.05	Q&A
11.15	Coffee
11.40	Geeta Nanda OBE CEO Metropolitan Thames Valley Housing
12.00	Steve Wood CEO NHBC
12.20	Matt Fleming Executive Chairman AF Oliver
12.40	Q&A
12.50	Lunch
14.00	Robert Gardner Chief Economist Nationwide
14.20	Tom Bill Head of UK Residential Research Knight Frank
14.40	Robert Colvile Director The Centre for Policy Studies
15.00	Q&A
15.10	Coffee
15.30	David Smith Economics Editor The Sunday Times
15.50	Mark Farmer CEO Cast Consultancy
16.10	Professor Julienne Meyer CBE Chair, Older People's Housing Taskforce DLUHC
16.30	Q&A
16.40	Conference Close
Until 18.00	HMI Drinks Reception

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Russell
Speechlys

greenbelt
...green by nature

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A Powerful ERP Built for the Construction Sector

Construction Industry Solutions (COINS), recently acquired by The Access Group, is leading construction management software providing an end-to-end management solution to the construction, engineering, home building and service sectors.



75% of new homes in the UK built by the largest homebuilders are by companies using Access COINS.

- Access COINS is an easy-to-use, fully integrated, modern solution that brings everything construction teams need together in one place with a single login.
- Provides 100% real-time visibility over every aspect of a construction project.
- Accessible on-the-go with a powerful app for mobile and tablet use.
- Integrates with all major project planning tools.
- The best way for construction firms to manage documents, communications, issues, risks, costs and activity on site.

A significant percentage of construction and housebuilding companies use COINS construction software, and I think it's quite right that Barratt should be aligned with those companies in using the best technology available.

David Thomas,
CEO,
Barratt Developments

The Access COINS construction cloud is an entirely construction-specific software. Unlike competitors, it's built for and specific to the needs of construction companies.

"We've now got one ERP solution for everything we do as Vistry Group – we can achieve economies of scale, we can support people easier and if we implement an upgrade or enhancement it benefits the whole of our business."

Chris Pearce
Chief Information Officer
Vistry Group

Access COINS Construction Management Software



“One source of the truth, that’s what a construction ERP is all about. Data goes into COINS once and is accessible across so many different parts of the system by a variety of users.”

Susan Jackson
Managing Director
Campion Homes

Built specifically for the construction industry, by those that know the construction industry, Access COINS has been evolving and adapting to the sectors’ needs since 1986.

Hosted on The Cloud, Access COINS helps construction companies manage every aspect of their operations and construction schemes, including financial and project management.

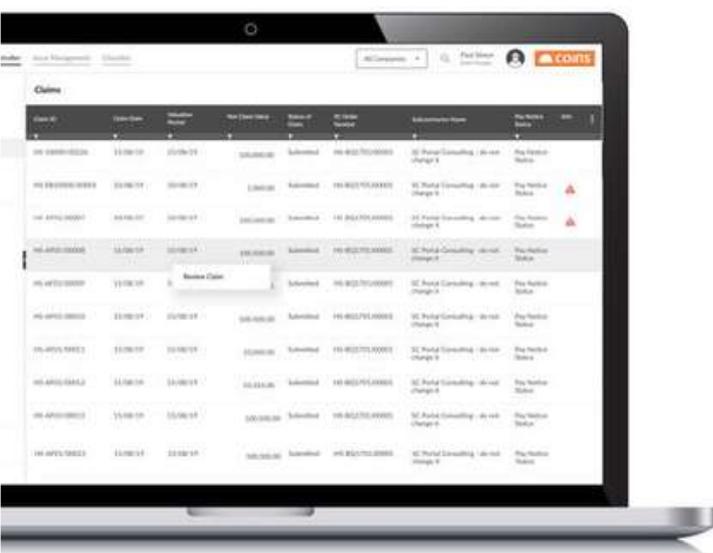
Access COINS integrated modules include –

- Financials
- Operations
- Supply Chain Management
- HR & Payroll
- Project Management
- Service Management

Access COINS automates core processes and provides visibility over the most important aspects of project management - budgets, costs, tasks, issues, reports etc., within a clear and easy-to-use interface.

Access COINS is a project management solution designed specifically to meet the challenges of the construction industry. Not only does it provide features tailored to the industry, but it offers a joined-up and integrated experience that brings together all areas of a construction project, from billing to issues to managing documents. This helps project managers speed up key processes, provides greater visibility, and reduces risks, such as going over budget or failing to meet health and safety requirements.

Access COINS provides project managers with the tools to stay on top of project developments at all times. Change is the biggest obstacle to project management in construction. Access COINS ensures that project managers can log change, communicate that change, and ultimately deal with change more efficiently.



How Access COINS Impacts Every Part of the Construction Management Process

We've worked with COINS to develop construction solutions that we see not only as a fit for Barratt but also as a fit for, and across the industry as a whole.

Through this investment, we'll have our team able to spend more of their valuable time concentrating on driving value in all areas of our business supporting our Building Excellence philosophy to ultimately improve our margins.

Jon Watkin, Group Commercial Director, **Barratt Developments**

Find out more 

www.coins-global.com

"Consolidation is helped hugely by us all being on one system – we know that all information that's input into COINS provides one version of the truth."

Jill Coley,
Group Head of Finance,
Vistry Group

Overcoming major threats to housebuilders in 2023

The role of digital
transformation





Foreword

Matt Keen, Director, Construction Strategy, Autodesk

After several years of steady growth, spurred by low borrowing costs and supportive government policy, the housing market is starting to **slow-down**; with 72% of estate agents making most sales below asking price in November 2022.¹ This comes as no surprise given **sharply rising interest rates**, building and living costs and general uncertainty in financial markets; but many **housebuilders are now starting to wonder whether their businesses will be immune to these impacts.**

While a slowing of the sector will **enable supply chain issues** to be ironed out in the short term, and the ability to buy and sell land quickly offers some protection; a perfect storm of these economic, as well as regulatory, consumer and commercial drivers are **challenging 'business as usual'**. Demand for private new builds is expected to fall by 9% this year, and rebound by a mere 1% in 2024.²

It's vital for housebuilders to **take transformative steps** now to make sure they can return to growth as quickly as possible. This whitepaper looks to challenge the housebuilding sector to consider the very real threats the industry faces and offers guidance on how to overcome them. **Whatever your perspective, beware the illusion that housebuilding is immune.**

72%

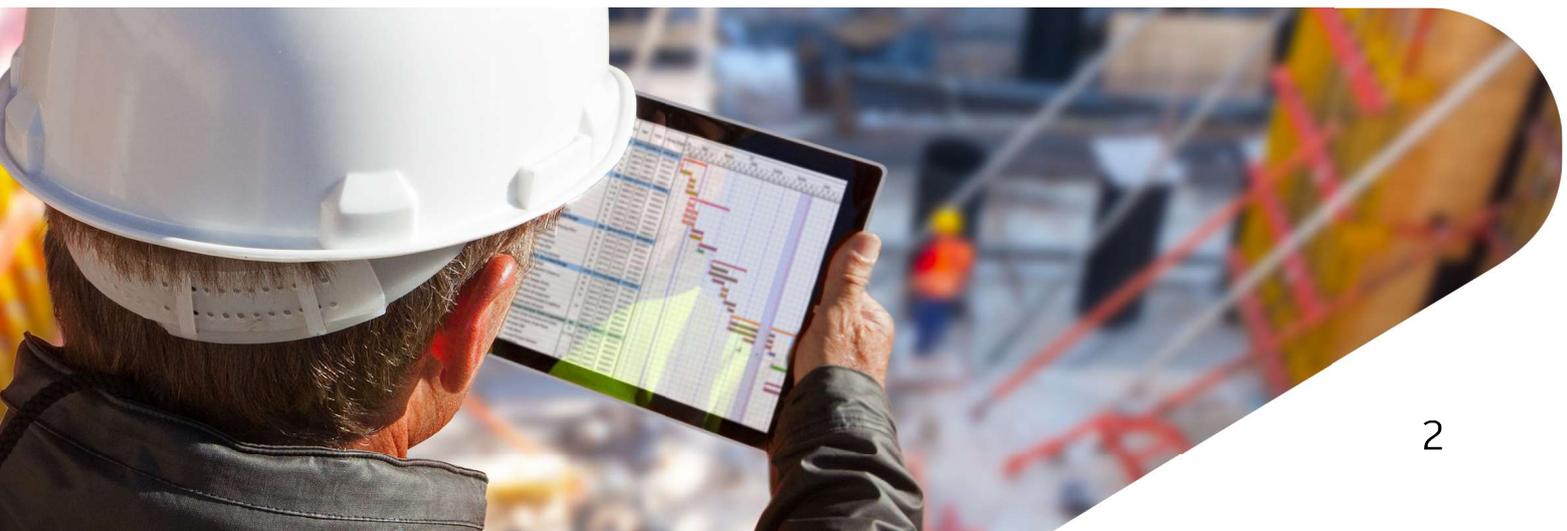
of estate agents make sales below asking price

9%

expected fall in demand for private new builds this year

1%

expected rebound of demand for private newbuilds in 2024





Three threats to housebuilders in 2023

1. Labour and material shortages

The struggle to secure skilled labour and on-going materials shortages are not new to anyone in the construction industry; but now pose a major threat to the UK housebuilding industry. RICS suggests that traditional approaches are “incapable of delivering the volumes of housing needed”.³

32%

of the industry has reported labour shortages,⁴ with 53% not able to find the workers they need⁵

59%

of the construction industry reported a shortage of materials constraining their output in 2021⁶

10.9%

year on year increase (September 2021-September 2022) in construction material prices for new housing, as seen in government data⁷

2. Decarbonisation and sustainability

Public sector procurement strategies have driven parts of the construction industry to modernise, but the housebuilding sector has not benefited from the same imperative to remove waste from projects, standardise components systems and processes and, to embed new technology to drive improvement.

Without embracing such changes, housebuilders will find it increasingly difficult to meet future carbon reduction targets required by the Future Homes and Building Standard and to adequately implement the “golden thread” as mandated in the Building Safety Standard 2022.

39%

of the world’s carbon emissions generated by the construction industry⁸

1.5C

England would use up the entirety of its 1.5C carbon budget on housing alone if the government sticks to its pledge to build 300,000 homes a year⁹

2/3

of consumers say it’s important for their future homes to have sustainable features¹⁰



3. Evolving customer expectations

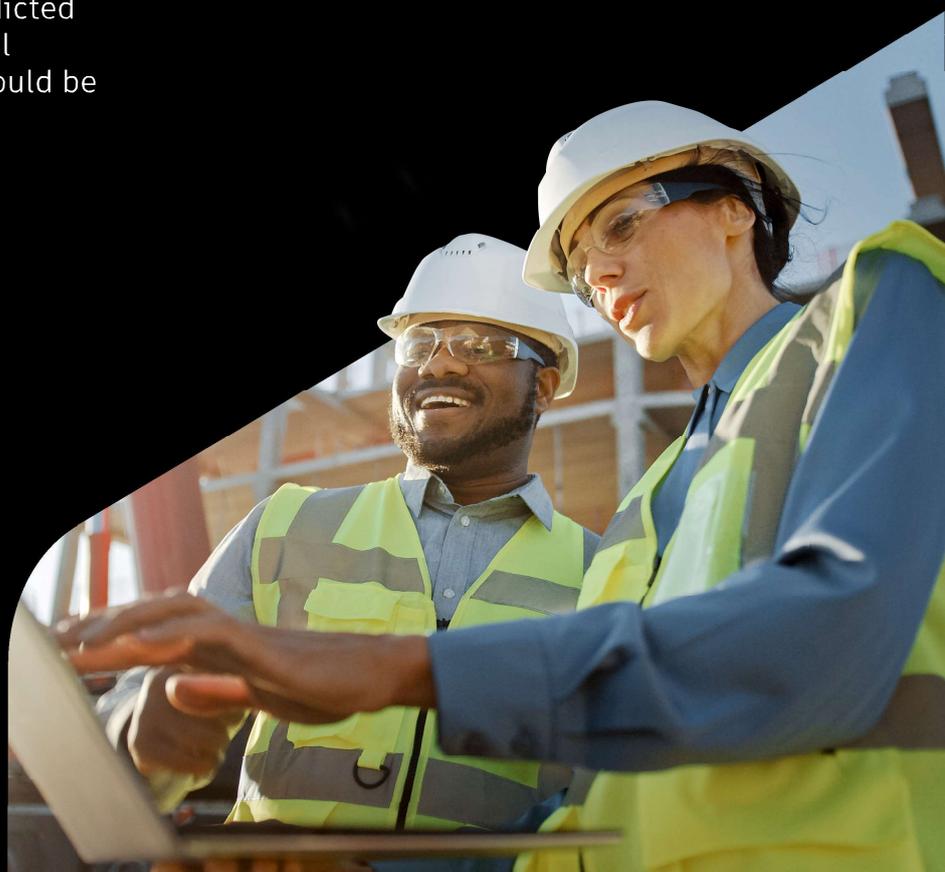
The industry is seeing **increasing consumer demand** for both bigger and more **energy efficient** homes. The desire for more square footage is still being driven by the social and workplace shifts created by COVID-19.¹¹ While the focus on energy efficiency is, of course, spurred by the increase in energy bills, with the average household energy bill rising by 54% earlier this year and continued uncertainty on the horizon. Appetite to **build our own homes** is also rising, with recent data from the Bacon Review suggesting that around one in three consumers would like to do so one day. It's clear that choice is key, as it increases engagement in the sector.¹²

Unfortunately, the UK housebuilding model does **not** generally empower consumers in this way. **Attitude towards new builds is negative**, with the consensus they are of poor quality,¹³ too small,¹⁴ overpriced for what is delivered and devoid of character.¹⁵ This is impacting the growth of the market, with only 13,000 new homes against the government's 300,000 target predicted to be delivered; when international research suggests it could and should be delivering around 120,000.¹⁶

Consumers have reported being twice as satisfied with homes built by smaller, local housebuilders as compared with volume builders,¹⁷ however, only 12% of new housing stock is currently being constructed by SMEs.¹⁸

In September 2022, the government released the Construction Playbook, committing to support SMEs through public procurement.¹⁹

The government also held a consultation calling for evidence on data on land control to help assist SMEs and new entrants to the housebuilding sector.²⁰





Six ways to transform and secure long-term growth:

- **Collaborate across the industry:** Working together as an industry is the only way Levelling Up plans can be fully realised. Mike King, executive technical services director at Robertson Group, argues, “there needs to be collaboration on a scale that I don’t think we’ve experienced within our industry. We need to break down some of the traditional barriers that prevent us from being as collaborative as possible in how we work with fellow tier one organisations and SMEs in the supply chain”
- **Better use of digital tools to secure contracts and investments:** BIM and cloud-based solutions for design and construction will be key to securing contracts and investments, with local authorities given the opportunity to bid for Levelling Up funds. Mike King argues they can also help get local communities onboard by “articulating the outcomes to communities and planning authorities alike”
- **Be smart and standardise:** Smart technology creates new opportunities for standardisation to help transform efficiency and productivity, while facilitating cost control and quality certainty. Standardisation can cut material waste by up to 90% when compared with site-based build,²¹ reduce dependency on labour and its associated costs
- **Entice new talent with a digital-first experience:** Digital technology is key to attracting ambitious young talent, as well as reducing overall reliance on labour as the benefits of digitalisation

are realised.²² In 2016, Mark Farmer’s *Modernise or Die* stated that unless the industry embraces digital at scale, “it will miss the greatest single opportunity to improve productivity and offset workforce shrinkage”

- **Bake sustainability into every part of a build:** The Institute of Mechanical Engineers made the case for standardisation and increased data sharing regarding building usage in its research into data as a driving force in reducing emissions. This clearly identifies the need for building design to incorporate digital technologies such as smart sensors and digital twins to underpin better management and use of energy
- **Increase the appetite for change:** None of these benefits will be realised if the industry doesn’t become more open to trying new things. Start small and scale up once a new model has been proven successful to do so safely





Closing remarks

Whatever the challenges facing your organisation right now, building a digital foundation to support your desired business outcomes and foster better collaboration is critical to success, both today and in the future. Autodesk is ready to be a proud partner in your digital transformation journey.

Appendix

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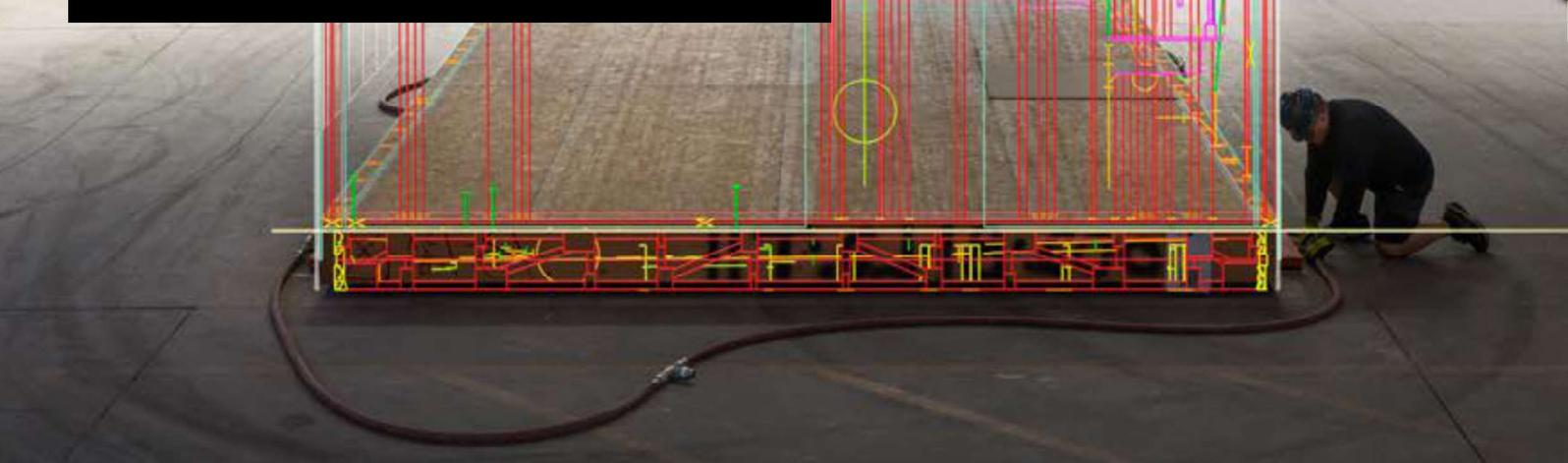
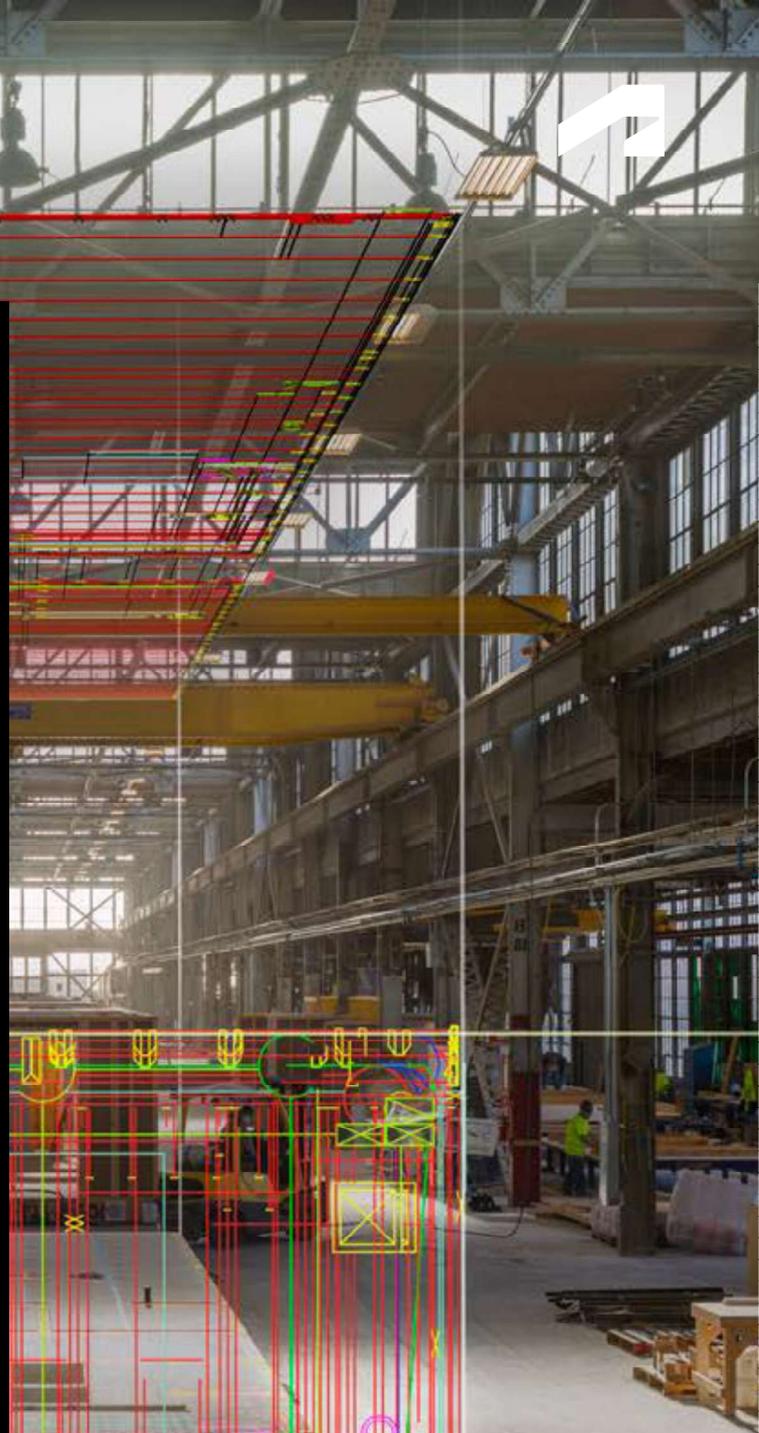




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*Compared to Hotpoint's non-coated standard hobs

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Nesawar	Ali	Financial Controller	Scotts of Thrapston
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Peter	Andrew	Chairman	Burrington Estates New Homes
Suzanne	Aplin	Group Sales & Marketing Director	Weston Homes
Debbie	Archibald	Director of IR/Comms & Strategy	Taylor Wimpey UK
Geoff	Arnold	CEO	Pinewood Structures
Rachel	Asquith	Managing Partner	AF Oliver
Ayer	Ayer	National Sales Manager	Crown Paints
Neil	Baker	Partner and Head of Planning & Environment	Clarke Willmott
Dave	Baker	Chairman	Robust Details
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Yolande	Barnes	Chair	UCL, Bartlett Real Estate Institute
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Mark	Behrendt	Planning Manager - East of England and SE	HBF
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Bill	Beyzade	Managing Director	Durkan Estates
Tom	Bill	Head of UK Residential Research	Knight Frank
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Robert	Boughton	Chief Executive	Thakeham Homes
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Martin	Brown	Development Director	McCarthy Stone
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Emma	Ramell	Head of Policy and Public Affairs	HBF
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Lesley	Roberts	Director	LR Consultancy
Jamie	Roberts	Director of Managed Accounts	Reconomy UK
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Terry	Roydon	Director	Hansom Property Company
Caryl	Russell	Sales Director	Castle Green Homes
Hannah	Ryle	Marketing Manager	Castle Green Homes
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Rachel	Scott	Development Director	Gleeson Land
Calum	Semark	Chief Operating Officer	Thakeham Homes
Richard	Shackleton	Managing Director	Shropshire Homes
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Keith	Simmons	Managing Director	Taylor Wimpey Bristol
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David	Smith	Economics Editor	The Sunday Times
Nick	Snazell	Market Insight & Strategy Director	Stark Building Materials UK
Katy	Snow	Contract Sales and Operations Director	Omega
Harriet	Spalding	Sales and Marketing	Mandale Homes
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Paul	Stanley	Relationship Director	Lloyds Banking Group
Sammie	Steele	Managing Director - Placemaking & Regeneration	Places for People

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James	Stevens	Director for Cities	HBF
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Tim	Stone	Regional Chief Executive	Redrow Homes
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Matt	Tiller	Head of Technical Services	Thermal Economics
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Justin	Webb	Journalist and Author	
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James	Wixey		Dulux
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Steve	Wood	Chief Executive Officer	NHBC
Joe	Worland	Relationship Director	Lloyds Banking Group
Nigel	Yates	Managing Director	ProspectGB

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