



Bring them home

AF OLIVER



1985

PowerPoint

More effective than Nytol



Today's presentation

- 1 **EXPLORE:** How did we get here?
- 2 **EXAMINE:** The true state of the market & where it is heading
- 3 **CREATE:** A plan to beat this market



1

Explore

How did we get here?

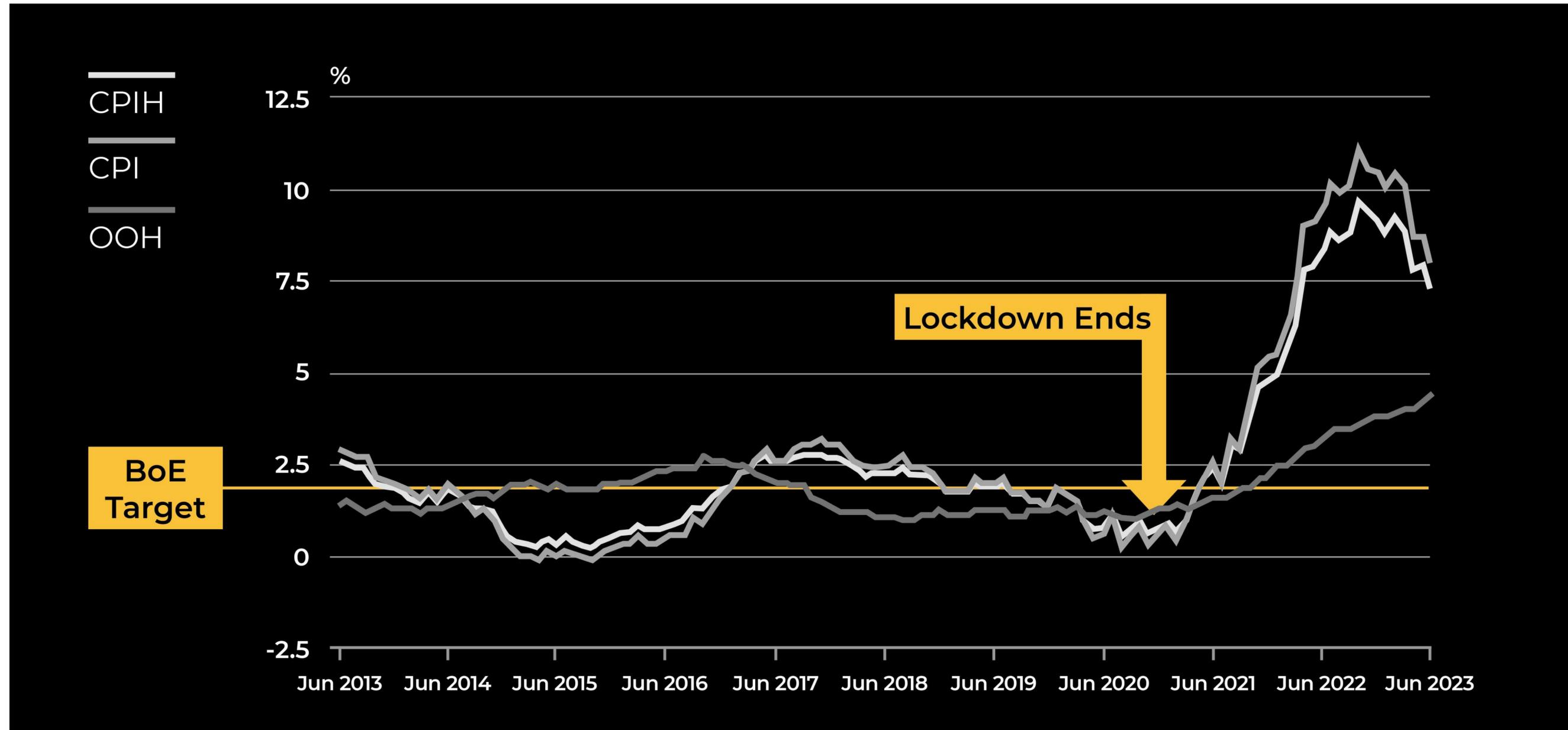


End of lockdown March 21
Buyers came out like greyhounds



Inflation – June 2023

CPIH, OOH component and CPI annual inflation rates for the last 10 years, UK, June 2013 to June 2023



Source: ONS

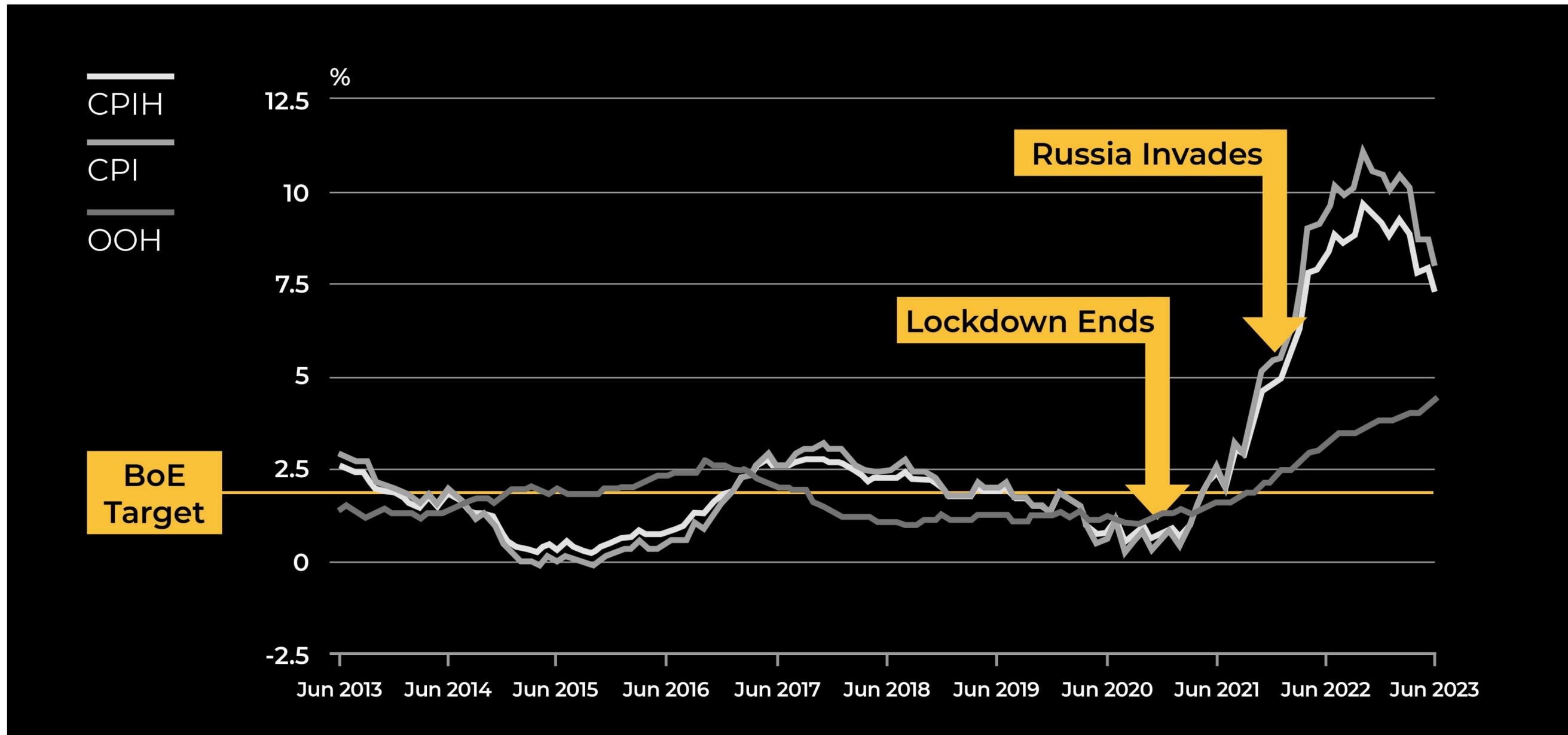


Russia invades Ukraine Feb 22
And the world felt the shock waves



Inflation – June 2023

CPIH, OOH component and CPI annual inflation rates for the last 10 years, UK, June 2013 to June 2023



Source: ONS

Our Prime Minister

Resigns 7th July 22



Our Prime Minister

6th Sept - 20th Oct



Our Chancellor

Budget 13th Sept

Fired 14th Oct



Our Prime Minister

Elected 20th Oct



Our Chancellor

Autumn statement

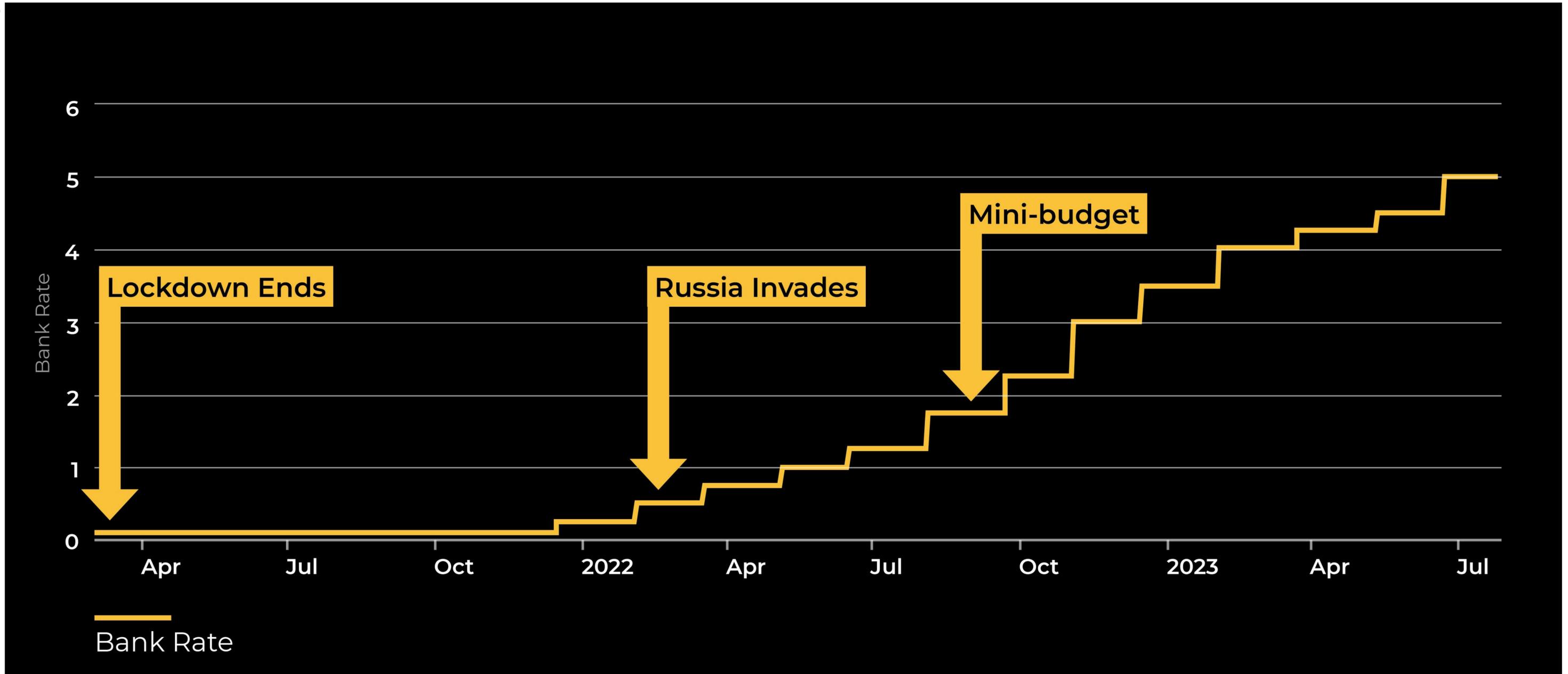
17th Nov





Base Rate – Since March

Official Bank Rate



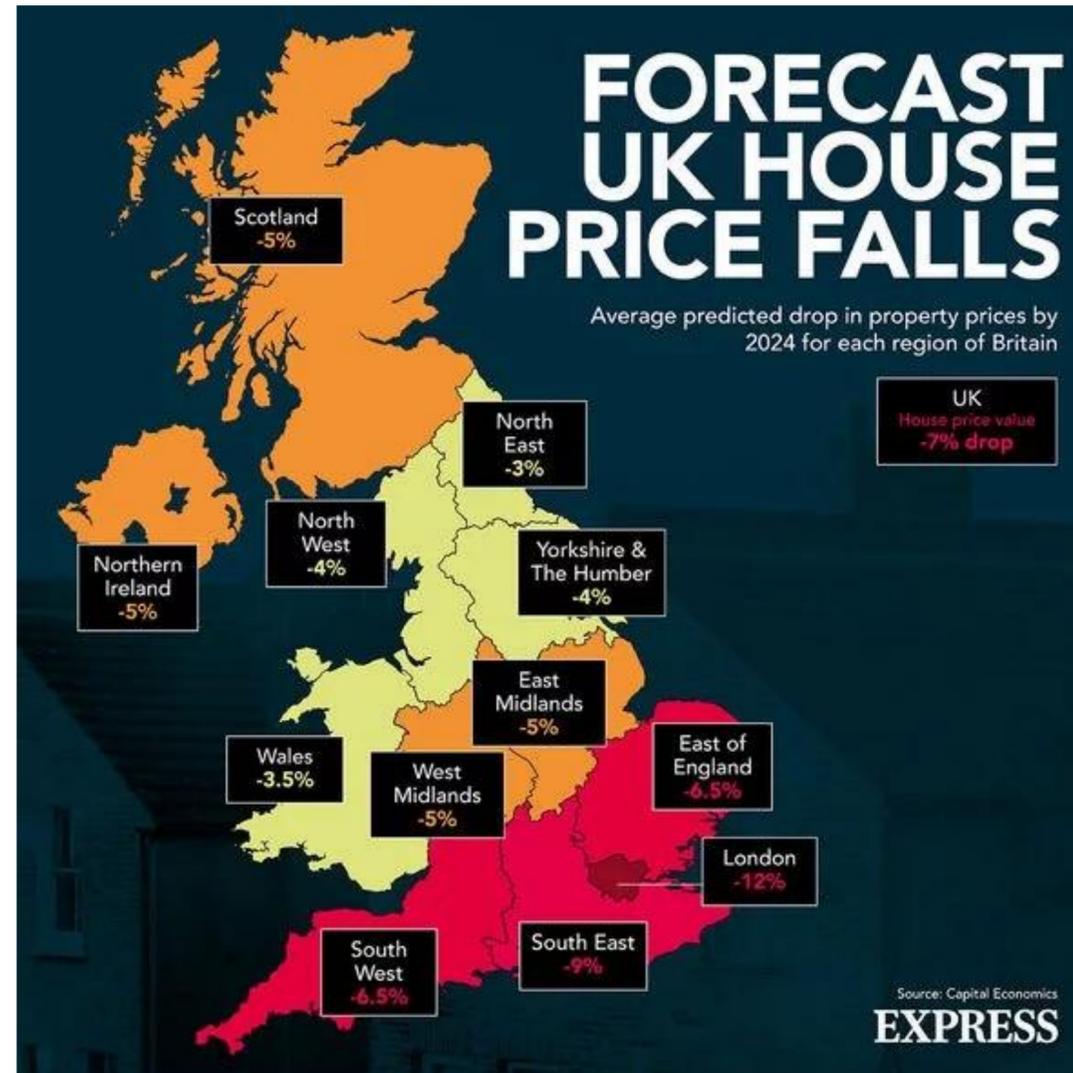
Source: Bank of England

2

Examine

The true state of the market

The press on prices and volumes



The Telegraph

Britain's property market faces a reckoning – the house price plunge is only beginning

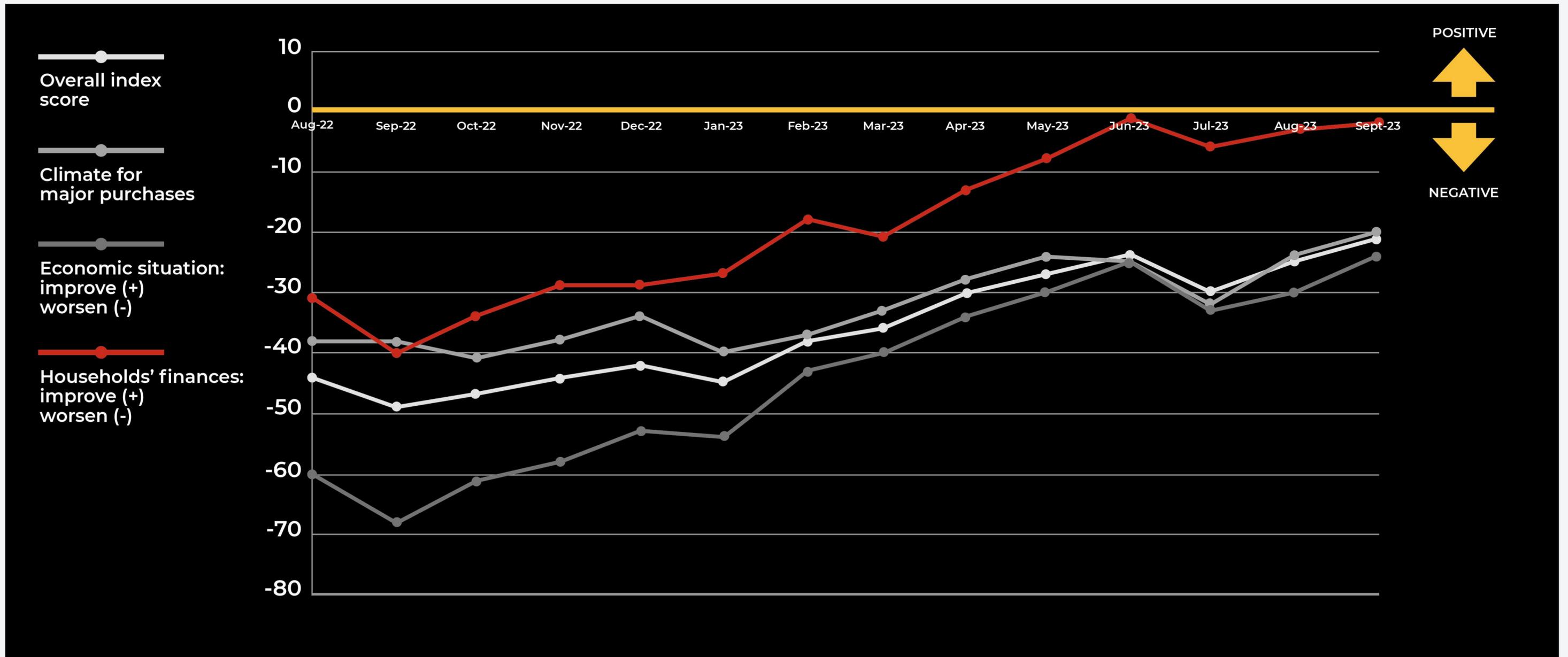
Punch-drunk from the mini-Budget, economists fear the property market is staggering into another crash

By Melissa Lawford
9 April 2023 · 6:00am



GfK consumer confidence

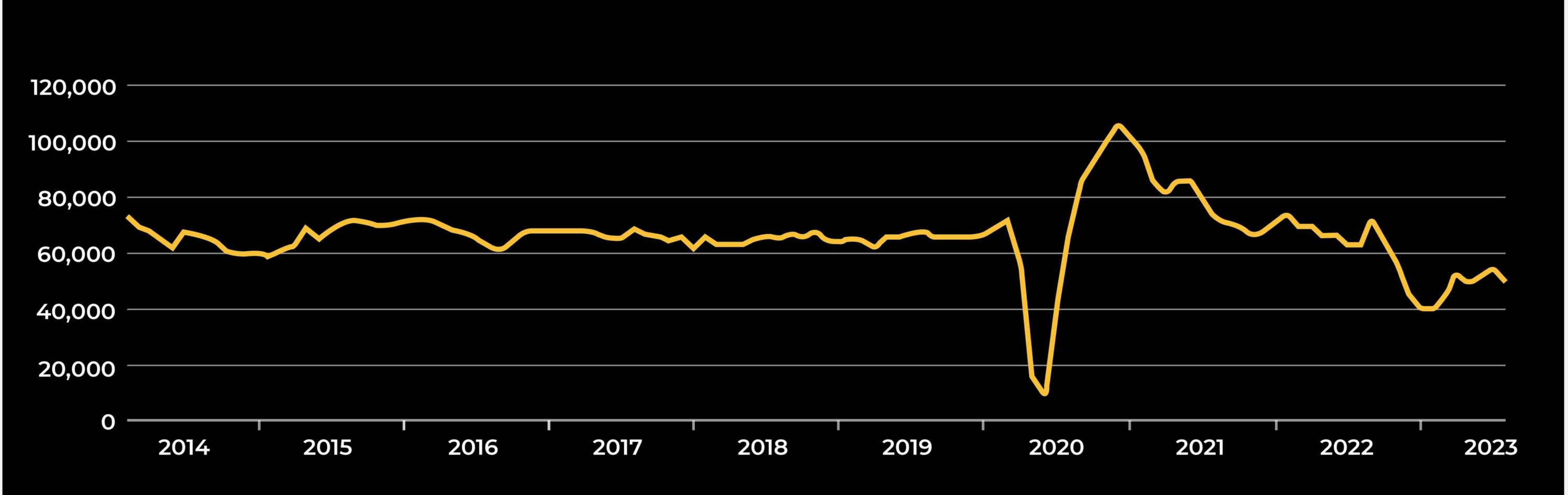
September 23



Data collected between September 1st and September 13th. Next Survey due October 20th

UK Mortgage Approvals

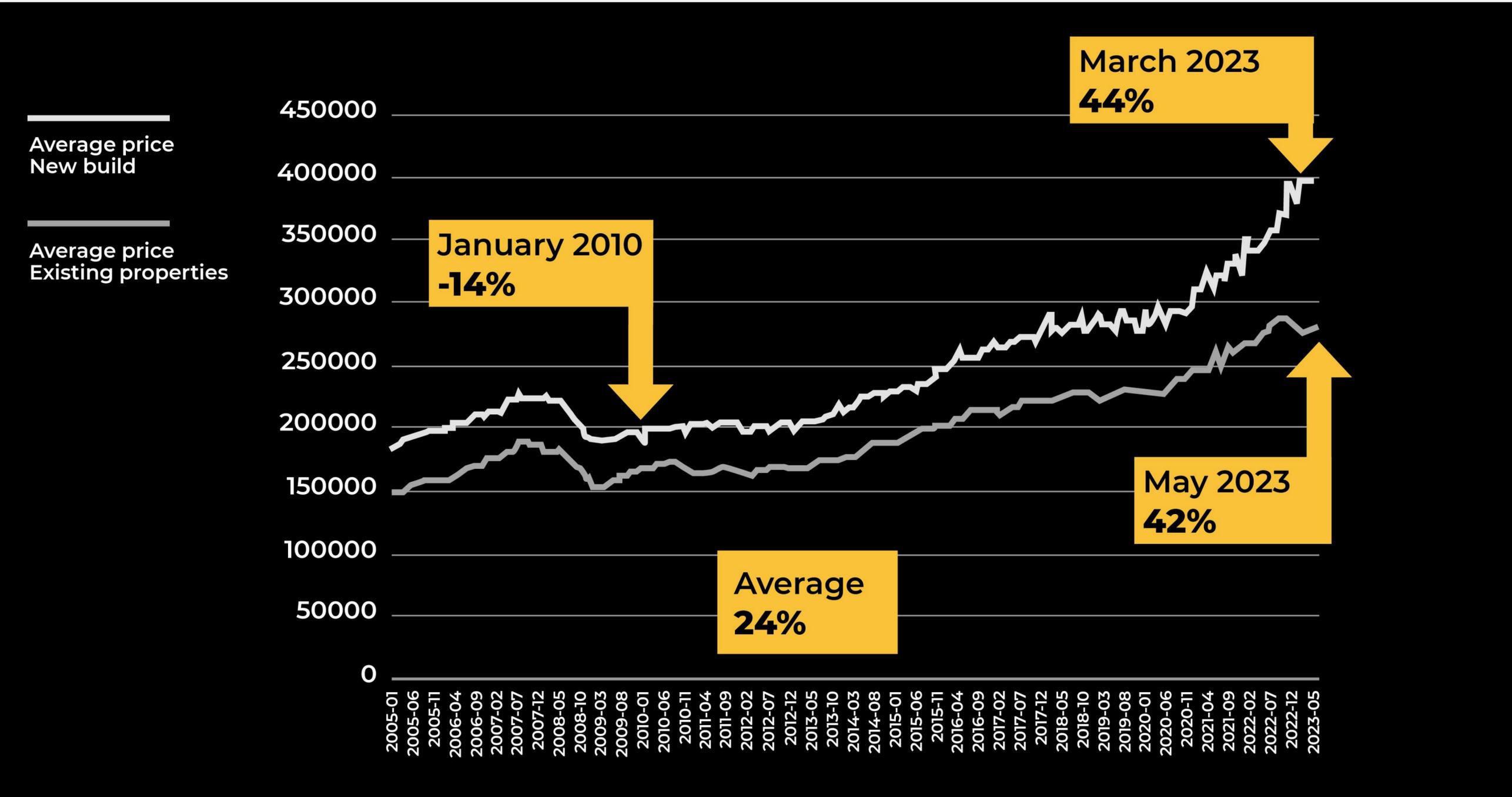
July 23



Source: Bank of England

New Build Premium

2005 – May 2023



3

Create

A plan to beat this market

**It's all about
market share**
Margin neutral
commercial advantage





How's your hygiene?

Presentation

Data

Comms

Frugal living is the flavour of the month



Cooking at home more
44%



Being more energy efficient
(e.g. turning down heating)
43%



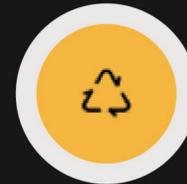
Walking / cycling more
36%



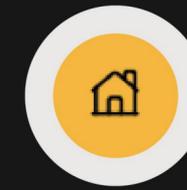
Setting a personal budget
34%



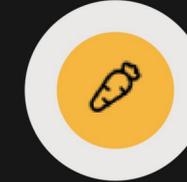
Doing more activities that cost less
34%



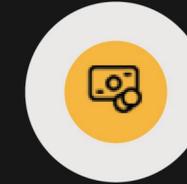
Reusing products more
30%



Delaying big purchases
(e.g. new house/car)
24%



Growing / preparing your own food
21%



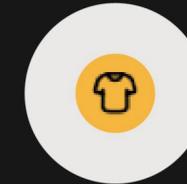
Selling things you own
16%



Stop spending on credit
15%



Canceling subscriptions
11%



Buying secondhand clothes
9%

GWI Zeitgeist January 2023

15,383 consumers in 12 markets aged 16-64

What we want from brands

high quality
over cheap
prices



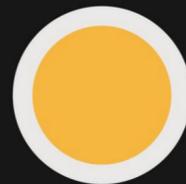
Quality
53%



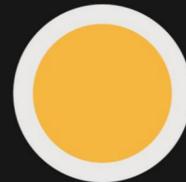
Cost
36%



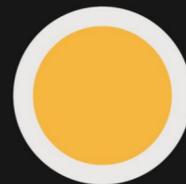
If I trust the brand
32%



Good reputation
31%



Positive customer reviews
31%



Special offers / discounts
31%



If I fits with my personality / style
29%



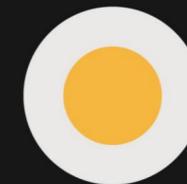
Good customer service
27%



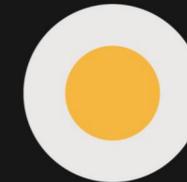
If I'm familiar with the brand
23%



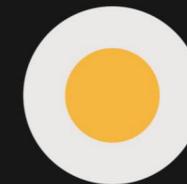
If it's convenient to find / buy
20%



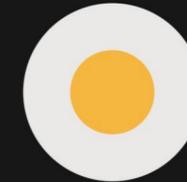
If I align with the company / brand value
16%



Brand support / action
for climate change
15%



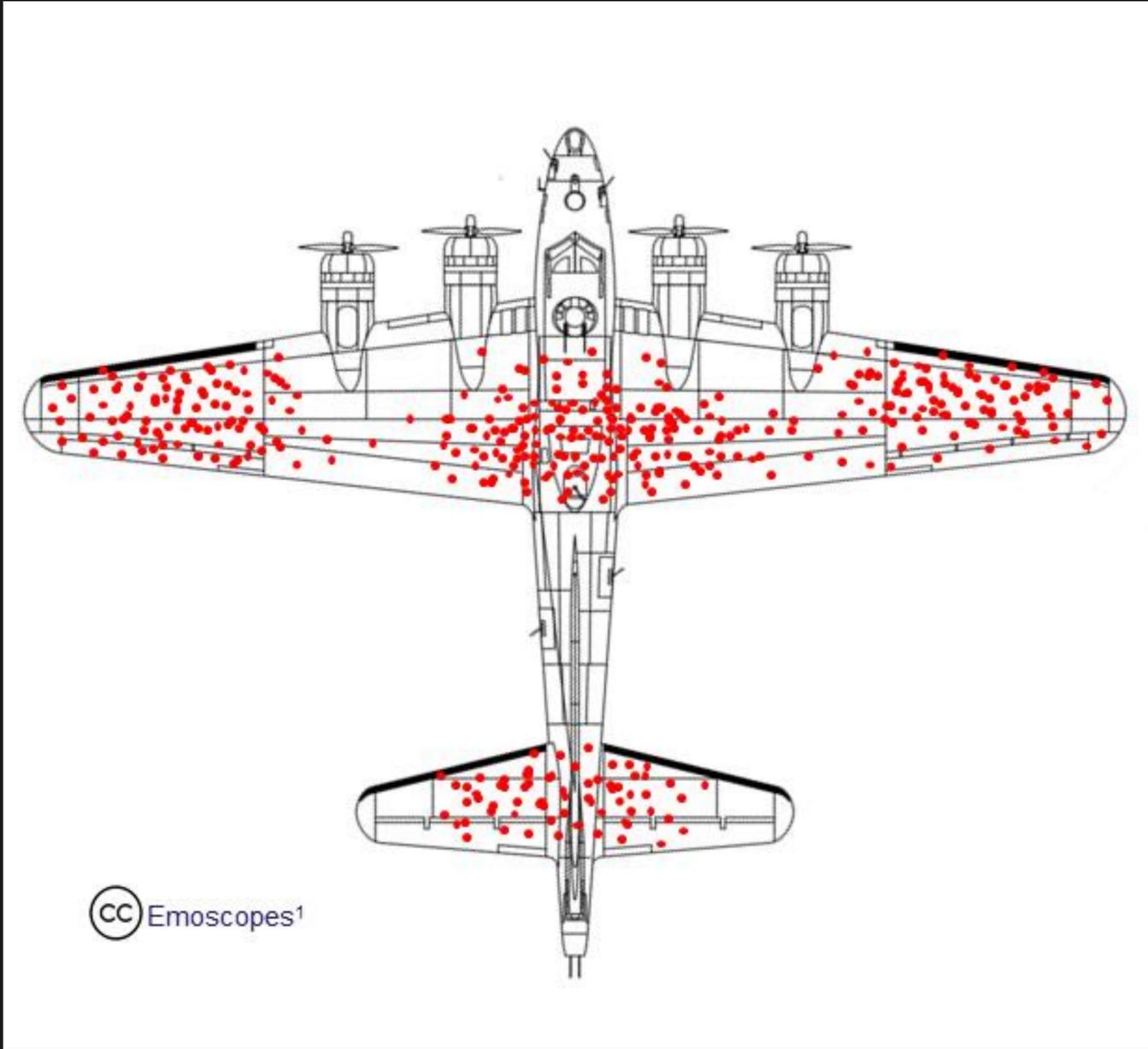
Brand support / action
for social justice causes
15%



If it enhances my status
12%

Abraham Wald

Survivorship Bias



Thank you.
Why not join me
for Halloween?

31 October 2023

MarketCast XV