



Housebuilder Watch

Spring 2010



Competitive Advantage Consultancy Limited
4 Clevedon Court, Frimley, Camberley, Surrey, GU16 8YW
www.cadvantage.co.uk
Email: info@cadvantage.co.uk
Tel: 0844 6698728

Published: 22nd April 2010

Contents

	Page
1. Overview	1
2. Last Quarter & Projected Activity	2
3. The Private Developer and Social Housing	20
4. Implementation of Code for Sustainable Homes	23
5. Mix of Dwelling Types	29
6. Construction Methods	35
7. Social Housing Refurbishment	48
Appendix 1: Developers expecting increase in Starts	49
Appendix 2: Developers planning to open new sites	51
Appendix 3: RSLs planning to open new sites	53
Appendix 4: RSLs spend over 50% of budget on refurbishment	54
Appendix 5: Geographical Regions	55

List of Figures and Tables

Figure		Page
Fig 2.1	Trends in Quarterly Starts ahead of previous quarter	2
Fig 2.2	Private Developers – Starts in quarter quest ended compared with previous quarters, Regional Totals	2
Fig 2.3	National Private Developers – Starts in quarter quest ended compared with previous quarters, Regional Split	3
Fig 2.4	Regional Private Developers – Starts in quarter quest ended compared with previous quarters, Regional Split	3
Fig 2.5	Leading Private Developers – Starts in quarter quest ended compared with previous quarters	4
Fig 2.6	RSLs – Starts in quarter quest ended compared with previous quarters	5
Fig 2.7	RSLs – Starts in quarter quest ended compared with previous quarters, Regional Split	5
Fig 2.8	Private Developers – Expected change in Starts next quarter, Regional Totals	6
Fig 2.9	National Private Developers – Expected change in Starts next quarter, Regional Split	6
Fig 2.10	Regional Private Developers – Expected change in Starts next quarter, Regional Split	7
Fig 2.11	Leading Private Developers – Expected change in Starts next quarter	8
Fig 2.12	RSLs – Expected change in Starts next quarter, Regional Totals	9
Fig 2.13	RSLs – Expected change in Starts next quarter, Regional Split	9
Fig 2.14	Private Developers – Plans to open New Sites in the next six months, Regional Totals	10
Fig 2.15	National Private Developers – Plans to open New Sites in the next six months, Regional Split	10
Fig 2.16	Regional Private Developers – Plans to open New Sites in the next six months, Regional Split	11
Fig 2.17	Leading Private Developers – Plans to open New Sites in the next six months	12
Fig 2.18	RSLs – Plans for New Developments in the next six months, Regional Totals	13
Fig 2.19	RSLs – Plans for New Developments in the next six months, Regional Split	13
Fig 2.20	Private Developers – Average time between decision to Start and starting on site, Regional Totals	14
Fig 2.21	National Private Developers – Average time between decision to Start and starting on site, Regional Split	14
Fig 2.22	Regional Private Developers – Average time between decision to	15

	Start and starting on site, Regional Split	
Fig 2.23	Leading Private Developers – Average time between decision to Start and starting on site	16
Fig 2.24	Private Developers – Average time between starting on site and Sale, Regional Totals	16
Fig 2.25	National Private Developers – Average time between starting on site and Sale, Regional Split	17
Fig 2.26	Regional Private Developers – Average time between starting on site and Sale, Regional Split	18
Fig 2.27	Leading Private Developers – Average time between starting on site and Sale	19
Fig 3.1	Private Developers – Proportion of Starts represented by Social Housing, Regional Totals	20
Fig 3.2	Private Developers – Proportion of Starts represented by Social Housing, Regional Split	20
Fig 3.3	Leading Private Developers – Proportion of Starts represented by Social Housing	21
Fig 3.4	RSLs – Proportion of New Construction placed with Private Developers, Regional Totals	22
Fig 3.5	RSLs – Proportion of New Construction placed with Private Developers, Regional Split	22
Fig 4.1	Private Developers – Proportion of Starts built to Level 3 CSH, Regional Totals	23
Fig 4.2	Private Developers – Proportion of Starts built to Level 3 CSH, Regional Split	23
Fig 4.3	Leading Private Developers – Proportion of Starts built to Level 3 CSH	24
Fig 4.4	RSLs – Proportion of Starts built to Level 3 CSH, Regional Totals	25
Fig 4.5	RSLs – Proportion of Starts built to Level 3 CSH, Regional Split	25
Fig 4.6	Private Developers – Proportion of Starts built to Level 4 CSH, Regional Totals	26
Fig 4.7	Private Developers – Proportion of Starts built to Level 4 CSH, Regional Split	26
Fig 4.8	Leading Private Developers – Proportion of Starts built to Level 4 CSH	27
Fig 4.9	RSLs – Proportion of Starts built to Level 4 CSH, Regional Totals	27
Fig 4.10	RSLs – Proportion of Starts built to Level 4 CSH, Regional Split	28
Fig 5.1	Private Developers – Proportion of Multi-occupancy dwellings as Starts in the last quarter, Regional Totals	29
Fig 5.2	Private Developers – Proportion of Terraced dwellings as Starts in the last quarter, Regional Totals	29
Fig 5.3	Private Developers – Proportion of Semi-detached dwellings as Starts in the last quarter, Regional Totals	30

Housebuilder Watch – Spring 2010

Fig 5.4	Private Developers – Proportion of Detached dwellings as Starts in the last quarter, Regional Totals	30
Fig 5.5	National Private Developers – Split of Starts by dwelling type last quarter, Regional Split	31
Fig 5.6	Regional Private Developers – Split of Starts by dwelling type last quarter, Regional Split	32
Fig 5.7	Leading Private Developers – Split of Starts by dwelling type last quarter, Regional Split	33
Fig 5.8	RSLs – Proportion of Multi-occupancy dwellings as Starts in the last quarter, Regional Totals	34
Fig 5.9	RSLs – Split of Starts by dwelling type last quarter, Regional Split	34
Fig 6.1	Private Developers – Proportion of Starts using Timber or Steel Frame, Regional Totals	35
Fig 6.2	Private Developers – Proportion of Starts using Timber or Steel Frame, Regional Split	35
Fig 6.3	Leading Private Developers – Proportion of Starts using Timber or Steel Frame Housing	36
Fig 6.4	RSLs – Proportion of Starts using Timber or Steel Frame, Regional Totals	37
Fig 6.5	RSLs – Proportion of Starts using Timber or Steel Frame, Regional Split	37
Fig 6.6	Private Developers – Are you considering using any additional Modern Methods of Construction, Regional Totals	38
Fig 6.7	National Private Developers – Are you considering using any additional Modern Methods of Construction, Regional Split	38
Fig 6.8	Regional Private Developers – Are you considering using any additional Modern Methods of Construction, Regional Split	39
Fig 6.9	Leading Private Developers – Are you considering using any additional Modern Methods of Construction	40
Fig 6.10	RSLs – Are you considering using any additional Modern Methods of Construction, Regional Totals	41
Fig 6.11	RSLs – Are you considering using any additional Modern Methods of Construction, Regional Split	41
Tble 6.12	Modern Methods of Construction being considered	42
Fig 6.13	Private Developers – Are you considering introducing any new materials, components or systems, Regional Totals	42
Fig 6.14	National Private Developers – Are you considering introducing any new materials, components or systems, Regional Split	43
Fig 6.15	Regional Private Developers – Are you considering introducing any new materials, components or systems, Regional Split	44
Fig 6.16	Leading Private Developers – Are you considering introducing any new materials, components or systems	45
Fig 6.17	RSLs – Are you considering introducing any new materials, components or systems, Regional Totals	46

Fig 6.18	RSLs – Are you considering introducing any new materials, components or systems, Regional Split	46
Tble 6.19	New materials, components or systems being considered	47
Fig 7.1	RSLs – Proportion of budget assigned to refurbishing existing housing stock, Regional Totals	48
Fig 7.2	RSLs – Proportion of budget assigned to refurbishing existing housing stock Regional Split	48