



Changes in the Building Industry

- Responding to New Urbanism -

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Starting Point — The Builders proven formula

- Certain truisms about the new home market still exist
 - Really efficient boxes
 - Minimise architectural elements to front façade
 - Minimise specification
 - Maximise space
 - Hit the price point
 - Capture volume

Starting Point — Consumer knowledge



- Consumer knowledge is increasing, though bottom \$ is the volume market
 - How many start with orientation and match design
 - How many design with land contours in mind
 - What price will they voluntarily pay for ESD
 - Do they know the right questions to ask
 - How many builders really care about the above
 - When will they think of homes like cars

Starting Point — The Developers Vision



- Lofty goals can be compromised in tougher times
 - Majority start with high goals
 - Did they have a realistic price point in mind and understanding of all costs
 - When does volume and price point compromise design in tough times
 - Does good design command a premium in all market conditions

Good News — The industry is shifting

- Cosmopolitan as an Example



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Good News — The industry is shifting

- 1997 – A vision that understood the market and trends in new urbanism
 - Urban consolidation
 - Higher and mixed density housing
 - Increasing design based regulation
 - A shift in one shoe fits all mentality
 - The role of the mega developer



Good News — The industry is shifting

- 1998 – 2000: Early Experiences at Menai & Hunterford with Landcom & team
 - A holistic approach
 - Extensive & principled guidelines
 - Dedicated solar courts
 - Cross – ventilation
 - Natheers ratings
 - Recessed garages
 - Corner treatments
 - Landscaping and fencing
 - Re-engaging the front yard, etc.
 - Modulation and materials use
 - Meaningful collaboration
 - A watchful eye

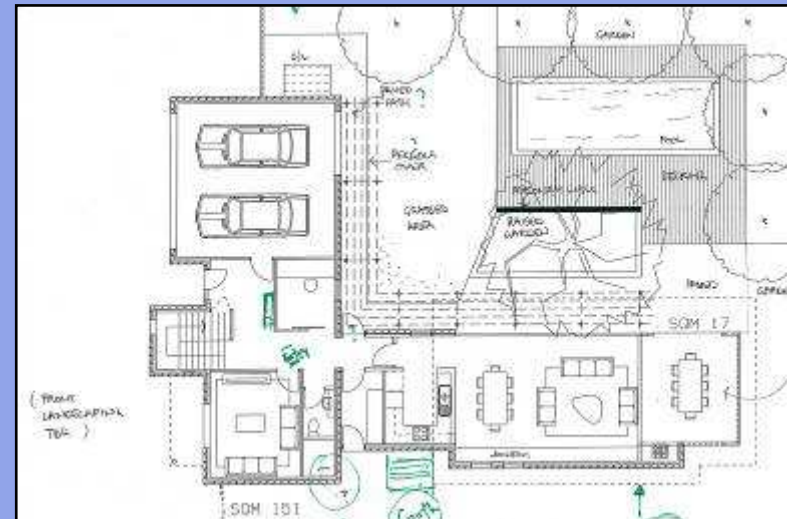
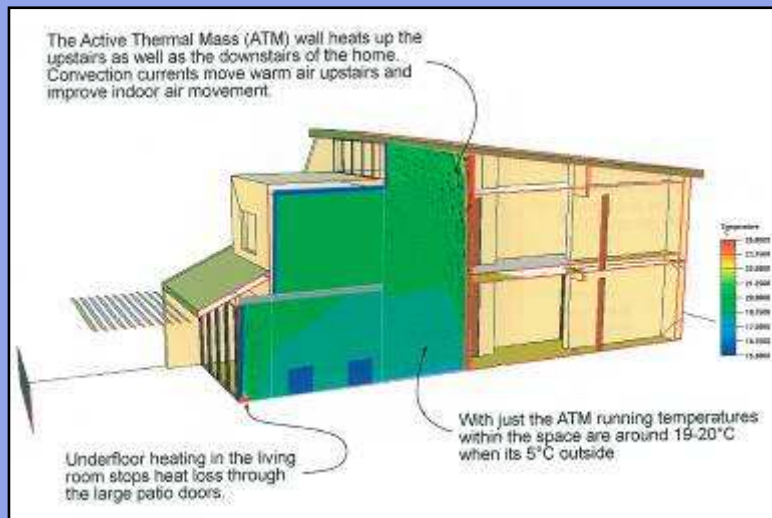


Good News — The industry is shifting

- 2000 – 2005: Industry Leverage
 - Working with Landcom, Delfin, Stockland, etc.
 - Focus in master planned estates (Forest Glade, Nelsons Ridge, Holroyd Gardens, Bridgewater, Macarthur Gardens, Park Central, Newbury, Ropes Crossing, Greenway Park)
 - Raising of the bar by developers and builders
 - Demonstration that new urbanism comes in different shapes and forms
 - Adapted to higher ESD requirements, eg BASIX
 - Need to ensure that the investment in increasing display villages is rewarded with volume
 - Need to assess if new urbanists were rewarded with higher share in a slowing market

Good News — The industry is shifting

- 2005 & Beyond: Continued Innovation
 - Breathable home
 - Better designs for orientation, etc.





Good Design — Arriving Safely

- How to avoid the taj mahal pitfalls
 - Start with end price point in mind
 - Establish land value and site costs
 - Define the demographic
 - Establish the design vision
 - Involve a builder / cost planner
 - Collaboratively move through design / sizing process
 - Avoid vacuum visioning & guidelines
 - Be realistic