

Schools, Universities and Hospitals - UK - March 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Government policy and the need to restrict public spending overrides population demands, leading to very different influences than if the market was determined by demand expectations. The ageing population in the UK should be driving much greater expenditure in the health sector than schools and universities, where population projections are for much more modest growth.”

– Terry Leggett Senior B2B Analyst

This report looks at the following areas:

- How will the market develop over the next five years?
- What will be the key market drivers?
- What sectors offer the best prospects?
- How is government policy affecting the market?
- Will increasing competition between universities increase property investment?

Education and health are critical issues of public policy and are perceived to be very influential in a party gaining votes. This encourages government policies to deviate from normal market influences. The importance of investment in the sector clearly encouraged the private finance initiative models in both sectors, whereby taxpayers do not have to fund building with costs spread over many years, effectively passing the payment onto the next generation of taxpayers. PFI and PF2 have been widely used in the sectors and spending distortions have contributed to the national debt. This has encouraged the government to restrict public spending, while the 'ring fencing' of education and health spending does not always translate into capital investment.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Schools, Universities and Hospitals - UK - March 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

The market

- Figure 1: UK market for new construction of schools, universities and hospitals, 2011-15 and forecast 2016-20
- Figure 2: Segmentation of the UK market for new construction of schools, universities and hospitals, 2015
- Figure 3: Segmentation of the UK market for property maintenance in schools, universities and hospitals, 2015
- Figure 4: UK market for new construction of schools, universities and hospitals, by funding, 2015
- Figure 5: Segmentation of the UK market for new construction of schools, universities and hospitals, 2011-15 and forecast 2016-20

Market factors

- Figure 6: English schools estate, by period of construction, 2015
- Figure 7: Scottish schools estate, by grade, 2015
- Figure 8: Age profile of NHS buildings, 2015
- Figure 9: Age profile of NHS Scotland estate, 2014
- Figure 10: Age profile of NHS Wales buildings, 2015

Companies

What we think

Key Issues

- Education and health are ring fenced, so surely the market is growing?
- What are the driving forces in the market?
- Is the supply sector very concentrated?

Introduction

- Definitions
- Methodology
- Abbreviations
- Market positioning and issues in the market

UK Economy

Overview

- Figure 11: UK GDP quarterly development, 2003-15
- Figure 12: UK GDP in economic downturns and recoveries since 1979

Inflation

Interest rates

House prices

Consumer spending

Manufacturing

- Figure 13: UK output by industry, 2008-15

Business investment

- Figure 14: UK GFCF 2003-15

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Schools, Universities and Hospitals - UK - March 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Imports

Exports

Market Overview

Key analysis

Market size and trends

Figure 15: UK market for new construction of schools, universities and hospitals, 2011-15

Figure 16: Forecast UK market for new construction of schools, universities and hospitals, 2016-20

Market segmentation

Figure 17: UK market for new construction of schools, universities and hospitals, by activity, 2011-15

Figure 18: UK education market for new construction, by activity, 2011-15

Figure 19: UK market for new construction of schools, universities and hospitals, by funding, 2011-15

Figure 20: UK market for new construction of schools, universities and hospitals, by sector, 2011-15 and forecast 2016-20

Figure 21: Segmentation of maintenance activity in schools, universities and hospitals, by sector, 2015

Schools

Key analysis

Existing Estate

England

Figure 22: English schools estate, 2015

Figure 23: English schools estate, by region, 2015

Figure 24: English schools estate, by period of construction, 2015

Scotland

Figure 25: Scottish schools estate, by grade, 2011-15

Wales

Figure 26: Welsh schools estate, 2011-15

Figure 27: Welsh schools estate, 2011-15

Construction and maintenance trends

Figure 28: Schools new construction expenditure, 2011-15, and forecast 2016-20

England

Figure 29: School capital spending 2009/10-2013/14

Figure 30: Devolved formula capital in England, 2016-17

Figure 31: School condition allocations in England, 2015-18

Scotland

Figure 32: Scottish schools constructed or substantially refurbished, 2008-15

Wales

Figure 33: Capital expenditure on education by local authorities in Wales, 2008-2014

Figure 34: 21st Century Schools scheme in Wales, Phase 1 2014-2019

Universities

Key analysis

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Schools, Universities and Hospitals - UK - March 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Estate

Figure 35: Term-time accommodation of full-time students, 2013/14

Construction and maintenance trends

Figure 36: University new construction expenditure, 2011-15, and forecast 2016-20

Figure 37: Trends in University capital expenditure, 2004-14

Figure 38: Major Capital Expenditure by Universities, 2013/14

Figure 39: Private investment deals in purpose built student accommodation, 2010-2015

Hospitals

Estate Size

England

Figure 40: Age profile of NHS buildings, 2011 and 2015

Scotland

Figure 41: Age profile of NHS Scotland estate, 2014

Wales

Figure 42: Age profile of NHS Wales buildings, 2015

Construction and maintenance trends

Figure 43: Health sector new construction expenditure, 2011-15, and forecast 2016-20

England

Figure 44: NHS Trust capital spending, by type 2015

Figure 45: NHS Trust costs to eradicate backlog maintenance, by type 2015

Scotland

Figure 46: NHS Scotland estate physical condition, 2014

Figure 47: NHS Scotland backlog maintenance, by region, 2014

Wales

Figure 48: Capital investments by NHS Wales, 2007-2018

Figure 49: NHS Wales costs to eradicate backlog maintenance, by type and region 2015

Industry Structure

Industry development

Figure 50: Development of the construction industry, by number of companies, 2010-14

Figure 51: Development of main trades and specialist contractors, by number of companies, 2010-14

Figure 52: Education Funding Agency contractors framework, 2013-17

Company Profiles

Balfour Beatty

Figure 53: Financial analysis of Balfour Beatty, 2011-15

Figure 54: Investment portfolio of Balfour Beatty by segment, 2013-14

Company strategy

BAM Construction

Figure 55: Financial analysis of BAM Construction, 2010-14

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Schools, Universities and Hospitals - UK - March 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company strategy

Bowmer & Kirkland

Figure 56: Financial analysis of Bowmer & Kirkland, 2010-14

Company strategy

Carillion

Figure 57: Financial analysis of Carillion, 2010-14

Figure 58: Geographic turnover of Carillion, 2014

Figure 59: Activity turnover of Carillion, 2014

Company strategy

Carillion Construction

Figure 60: Financial analysis of Carillion Construction, 2010-14

Company strategy

Galliford Try

PPP investments

Figure 61: Financial analysis of Galliford Try, 2011-15

Figure 62: Turnover segmentation of Galliford Try, 2015

Company strategy

Interserve

Figure 63: Financial analysis of Interserve, 2011-2015

Figure 64: Turnover segmentation of Interserve, 2015

Company strategy

Kier Group

Figure 65: Financial analysis of Kier Group, 201115

Company strategy

Laing O'Rourke

Figure 66: Financial analysis of Laing O'Rourke, 201115

Company strategy

Morgan Sindall Group

Figure 67: Financial analysis of Morgan Sindall Group, 201014

Figure 68: Turnover analysis of Morgan Sindall Group, 2014

Company strategy

Sir Robert McAlpine

Figure 69: Financial analysis of Sir Robert McAlpine, 201014

Company strategy

Skanska UK

Figure 70: Financial analysis of Skanska UK, 201115

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Schools, Universities and Hospitals - UK - March 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company strategy

Thomas Vale Construction

Figure 71: Financial analysis of Thomas Vale Construction, 2010-14

Company strategy

Wates Group

Figure 72: Financial analysis of Wates Group, 2010-14

Company strategy

Willmott Dixon Construction

Figure 73: Financial analysis of Willmott Dixon Construction, 2010-14

Company strategy

Further Sources & Contacts

Trade associations

Trade magazines

Trade exhibitions

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com