



Our Future Homes:

the power of connected
communities in rental living

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CEO of Hyperoptic

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Introduction

As a provider of world-class full fibre connectivity to hundreds of property developers across the UK, Hyperoptic prides itself on being in the corner of our partners and their residents, and we're pleased to be working with SAY Property Consulting and Anthony Slumbers on this collaborative piece of industry insight.

Hyperoptic was founded in recognition of the changing needs of the connectivity landscape. Back in 2011, gigabit-capable full fibre felt futuristic, and it's encouraging to now see that customer expectations have risen to meet capabilities, with access to the internet now seen as a 'fourth utility'. It's a similar story in the build-to-rent industry, where the demands of today are creating a forward-thinking market, evolving with the needs of owners and residents.

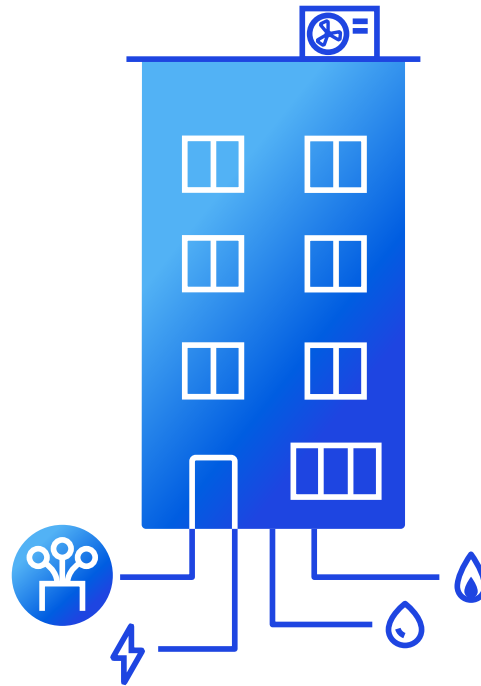
Hyper reliable, gigabit-capable connectivity continues to be the backbone of our partnerships. We understand that the game continues to change and that's why evolving our services to create products like Hyperoptic Managed Wi-Fi is a key milestone for both us and the industry. We're proud to drive innovation and our goal is to power amazing Wi-Fi experiences in-home and across communal areas as well as providing the supporting infrastructure to enable sustainability and efficiency goals to be met.

We believe in the power of future-proof infrastructure, particularly that which creates communities and allows people to enjoy seamlessly connected lives, enabled by smart technology, wherever they choose to live.

I hope you enjoy this insightful overview of a changing sector and look forward to partnering across the industry to deliver lasting solutions together.



Dana Tobak CBE, CEO of Hyperoptic



“access to the internet now seen as a fourth utility”



Interested in learning more about Hyperoptic Managed Wi-Fi?

Visit: hyperoptic.com/broadband/property/managed-wi-fi

To discuss your requirements, please contact Hyperoptic's Key Account Manager, Ian Chapman, at ian.chapman@hyperoptic.com.

Our homes and workplaces might seem unchanging, but the reality is that change is all around us. Residents may not always notice the innovations within the property industry, yet their expectations evolve as technology advances and lifestyles shift.

Looking ahead, I can't help but wonder: What will future residents need from their living and working spaces? How are we preparing today to meet these future demands?

Building on SAY and Hyperoptic's 2019 report "The Connected Home" and the 2021 report "The Post-Pandemic Home," we decided to explore the future even further to delve into both the real estate industries and renters' views on how technology might shape the future home.

Collaborating with leading futurist Anthony Slumbers, who interviewed industry leaders, we also gathered insights from a range of industry professionals and 2,000 renters.

This study indicates that the property sector is on the brink of transformative trends. Technological advancements, changing work patterns, and evolving societal and sustainable expectations demand proactive responses. Buildings are no longer just physical structures; they are becoming integrated ecosystems where people, devices, and services are interconnected.

By synthesising these perspectives, we aim to offer a comprehensive view of the future. This whitepaper is not merely an exploration of potential trends; it is a strategic roadmap to ensure the property sector continues to evolve and meet customer needs now and in the years to come. Our goal is to equip industry professionals with the knowledge and foresight to navigate these changes effectively and to create spaces that enhance the quality of life for all who inhabit them.



Debra Yudolph,
Founder and CEO, SAY Property Consulting

Buildings are no longer just physical structures; they are becoming integrated ecosystems where people, devices, and services are interconnected.

Methodology

This report features data from two comprehensive surveys. The first, conducted by OnePoll and commissioned by SAY, surveyed 2,000 renters who represent the typical demographic of the Build to Rent sector. SAY also surveyed over 100 real estate professionals within the property sector.

We also commissioned leading futurist Antony Slumbers to interview seven industry leaders, whose contributions informed his thought-provoking piece in this paper and whose inputs are referenced throughout this paper. We gratefully acknowledge:



Dan Batterton,
Head of Residential
- Legal & General
Investment Management



Honor Barratt,
Chief Executive
- Birchgrove



Jon Di Stefano,
CEO - Greencore
Homes



Nick Biring,
Co-Founder - BTR News,
PBSA News, BTR News
Australia and Rental
Living News UAE.



Anna Strongman,
CEO, Oxford University
Developments



Ben Harshak,
Co-Founder - The SoCo



Matthew Weiner,
Co-Founder - The SoCo

And finally, Ruckus, Hyperoptic's technology partner, have made a valuable contribution profiling the best-in-class tech being utilised by Hyperoptic to deliver future-facing connected communities.

Antony Slumbers: A blueprint for the future of rental living



Antony is a globally recognised speaker, advisor and writer on the future of real estate. A serial entrepreneur, he has founded and exited several proptech software companies and now consults real estate boards on 'Future Proof' Real Estate. His work centers on how advances in technology change the nature of demand across all asset classes. He writes an influential blog at antonyslumbers.com and teaches the online 'Generative AI for Real Estate People' course.

The Nobel Laureate in Physics Niels Bohr famously said, "Prediction is very difficult, especially if it's about the future!" He is right, but we can still grasp the direction of travel. What follows is just that—a direction of travel, and one we can all aspire to.

We have a rich history of adapting to societal shifts, and now technology, sustainability, and community-centric design are reshaping our living spaces. The residential rental market is innovating, driven by financial institutions now supporting the sector. As the office market diminishes and technology reduces the need for physical shops and offices, the certainty of people needing homes remains. With homeownership beyond reach for many, the rental market will grow and become more 'normal,' leading to professionally managed, amenity-rich alternatives catering to evolving needs.

Technology will integrate into residential assets, creating a cognitively aware environment that anticipates our needs. Advanced IoT sensors and AI analytics will enable real-time monitoring of building performance, addressing issues proactively. Our living spaces will optimise energy use, enhance well-being, and adapt to our changing requirements.

Community is being reimagined, with an emphasis on physical community spaces within residential developments. You might be part of a modern urban "village" with shared facilities like co-working spaces, workshops, and recreational areas. Some developments are exploring intergenerational living models, creating diverse, vibrant communities—a direction we should embrace.

Sustainability will become fundamental. Large-scale rental developments will use cutting-edge technologies to create carbon-negative buildings. Energy production and consumption will be hyper-localised, with rental communities operating their own micro-grids. The integration of renewable energy solutions, such as solar panels and battery storage, is increasingly viable, especially with national grid limitations. Moving towards self-sufficiency is essential for the real estate industry, which is now part of the power industry.

Behavioural science will also play a role. 'Nudge' techniques will promote efficient and sustainable energy use. Your home will participate in this effort. Climate resilience will be crucial, with new technologies and materials optimised for low-carbon impact. AI research is discovering new materials that will eventually enter the real estate supply chain, along with innovations like 'sponge cities' and vertical farming.

Developers, investors, operators and their tenants will benefit from data and AI, which will redesign rental property management and marketing. Predictive analytics will optimise pricing and tailor marketing efforts. AI-driven platforms will streamline the rental process, from virtual property tours to AI-negotiated leases.

We must embrace 'Human + Machine' thinking. The best developments will balance technological efficiency with human warmth, using AI-augmented property managers to combine efficiency with empathy.

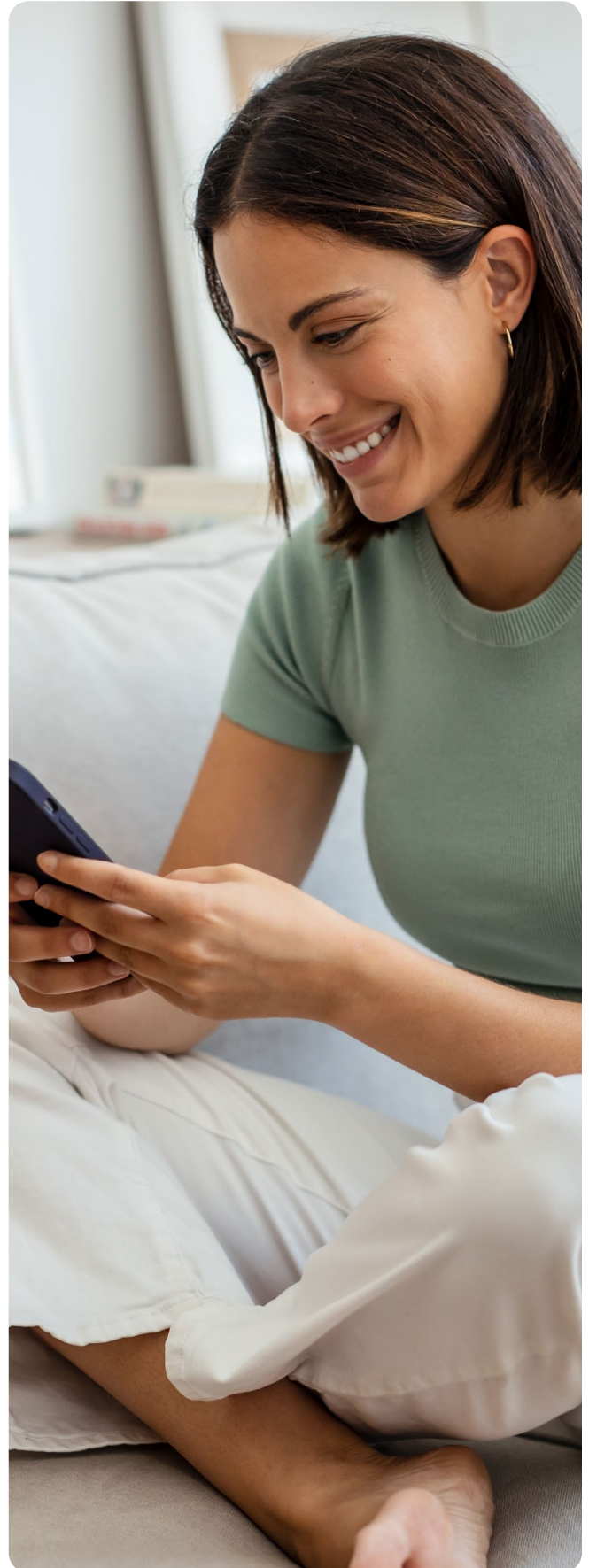
The shift towards sustainable, technologically advanced rental living has challenges. The industry must educate the workforce and residents about new technologies and sustainable living practices. Balancing sustainability and affordability, especially in key worker housing, is essential. As rental homes become more connected, privacy and cybersecurity issues will arise. Robust frameworks are being developed to protect your data and ensure smart rental units are secure.

The large-scale rental living sector is about reimagining “home” for a changing world. Successful players will respond to changing technologies, regulations, and social needs, viewing rental properties as platforms for human flourishing. The game has changed.

Your future rental home will be a dynamic, sustainable space, connected to your needs and the wider community.

It will address climate change, enhance well-being, and foster community resilience. We all have a role in shaping this new landscape. Our choices and engagement will drive the evolution of the rental sector. This future is possible, but only if we create and curate it wisely.

Get it right, and the future of rental living is bright, sustainable, and community-oriented. It’s a future that learns from our past, engages with our present, and embraces future possibilities. Are you ready to be part of this transformative journey?



The Study

In a world where our homes are continually adapting to new priorities and technologies, understanding the future of real estate is more crucial than ever. This whitepaper explores the dynamic shifts and emerging trends that are poised to reshape our living and working environments. By examining the latest insights from industry experts and comprehensive surveys, we reveal the challenges and innovations that will define the next era of rental living. Join us as we navigate the exciting future of real estate, uncovering the transformative changes on the horizon.



Shifting Priorities? Shifting Challenges

Whether renting or paying a mortgage, the cost of our homes represents a substantial investment, so it's no surprise that cost is still king when choosing where to live. In our study of 2,000 UK renters, 72% placed the price of rent at the top of their considerations, followed by access to public transport (41%) and crime rates in the area (40%).

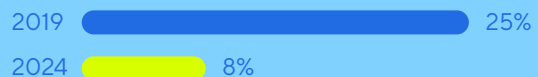
These concerns were reflected in our study of real estate professionals, which asked our sample about their opinions on technology and the adoption of tech within the sector. The study revealed that providing high-quality, affordable housing is considered one of the biggest challenges facing the industry today. Half (51%) of those surveyed believe making and keeping properties affordable has been a challenge faced constantly by the industry over the last 20 years, and 45% think it will continue to be a battle for the industry well into the future.

Of course, the affordability of a property is dictated by a number of contributing factors which our real estate professionals recognise. When asked their greatest challenge today, planning constraints are the greatest concern to those trying to get their project off the ground (71%). A quarter (27%) regularly find themselves balancing the books due to the cost of land for construction, while the profitability of projects (29%) and the battle to find funding (12%) all have a knock-on effect on the final cost of the development to the customer.

Looking ahead, the picture remains the same, with planning constraints dominating concerns (58%) as the companies responsible for building our homes walk the line between keeping a project profitable as well as affordable to those who live in them.

Though things get interesting when we look to attitudes surrounding the needs of the consumer. In 2019, when we last conducted our real estate professionals' study, the sample had a much greater concern about understanding the changing expectations of the customer in the future, with one in four (25%) believing the sector may struggle to adapt to their shifting needs. In 2024 however, this concern has reduced to just 8%. We think this represents a positive step in understanding from the real estate industry, reaching out to the customer base and putting this knowledge into action.

Changing customer expectations will be one of the biggest challenges facing the residential property sector



Attitudes to Technology in Real Estate

Connectivity without compromise

While a home can become a shelter from the outside world, we would still like our sanctuaries to be connected. As our social interactions become increasingly digital-focused, the meaning of community-centric construction is beginning to shift to include the technology and infrastructure keeping us connected in our homes. More and more it is becoming critical that the property industry and internet providers unite at a construction level to provide the connectivity desired by renters.

In our renter survey, 23% said they do their due diligence to check the Wi-Fi speeds at a new property - before living there. This is reflected in the experiences of our real estate professionals, a quarter (27%) believe fast, reliable broadband is a key attractor of renters. And two thirds (66%) would go as far as to describe it as 'the fourth utility'.

The internet and online services have become so ubiquitous and entwined in our daily lives that many would prioritise their digital connection over physical needs and utilities. In fact, over two fifths (43%) of real estate professionals believe the introduction of the internet and wireless connectivity is the most important piece of new technology introduced into the home in the last 100 years.

In a sensational revelation from the consumer study, respondents were asked which of the following they would choose to go without for a week: hot water, Wi-Fi, their shoes, or their bed. Most respondents would not go without Wi-Fi. A significant 26% would rather forgo hot water, 22% would rather go without shoes, and 20% would go without a bed, whereas only 18% would choose to go without Wi-Fi. Additionally, 20% are adamant about not compromising on having a high-quality broadband connection in their home.

Those in the process of creating new properties for their customers should work to recognise this requirement. It is hard to imagine a new development being greenlit which had a questionable connection to water and other key amenities; it's time that internet connectivity was added to that list.

Jon Di Stefano, CEO of Greencore, paints the issue in no uncertain terms - dependable Wi-Fi and broadband in the home is the expectation.

“We know that **speed and reliability** of broadband service is a key priority for our customers. It's part of the due diligence right from the start when buying a site that the expected level of connectivity can be provided and it's as important as other traditional utilities.”



John Di Stefano, Greencore Homes

Dan Batterton, Head of Residential at Legal & General Investment Management adds: “I foresee a growing interest and interrogation from the customer in the tech which comes with their home, especially as sensors and ‘Internet of Things’ become more commonplace. At the moment, broadband quality and the speeds they can achieve via the Wi-Fi is really where the knowledge stops, for now.”

Of course, workers within the residential property sector are Wi-Fi and broadband users themselves and have experienced the shortcomings of their network both at work and at home. In the study, nearly half (49%) said they had experienced an issue with their connection in the last six weeks. And three in five (57%) believe issues are less likely to occur on their more stable work network, rather than at home.

23% said they check the Wi-Fi speeds they can achieve at a new property before considering living there

Of real estate professionals...
43% believe the introduction of the internet and wireless connectivity is the most important piece of new technology introduced into the home in the last 100 years

The lockdown effect

We don't have to look far to see why rock-solid connectivity in the home has become such a necessity. For millions of Brits, the rise of remote working has transformed the shape and purpose of their homes, and their connectivity needs have shifted with it.

Of those surveyed, 45% work from home at least some of the time, and so feel the pressure to stay connected not only for entertainment and communication in their leisure time, but also for those all-important Zoom calls with colleagues as well.

Of those who work from home, a stable internet connection is the feature of their home they are most unwilling to compromise on, with 58% seeing stability from their provider as a must-have. This is in comparison to the 24% who view stable services from other core utilities, like water and gas, as essential.

And if we pull out to our sample in total, one in five (20%) feel unwilling to bend on a reliable internet connection into their

home, with 30% having invested in a faster connection in the last 12 months.

The rise of WFH and the experience of lockdown across 2020-2022 has irrevocably changed how people think about their homes. Overnight, these places of refuge suddenly become our full-time workspaces, our entertainment spaces, our exercise spaces and more. For a renter scouring the market in 2024, the function of their desired property could be much more complex than if they were conducting their search in a pre-Covid-19 world.

Dan Batterton shines a light on the attitudes of customers for whom lockdown remains a fresh memory: "Data absolutely changes how we see our homes and our plans for their size and features. It's a specific example but take the feature of a balcony. We now know what a balcony is worth and what different sizes of balconies are worth. Five years ago, we just had to make an educated guess."

Nick Biring, BTR News, connects the dots between customer experiences during the pandemic and changing demands for connectivity within the home:

"The pandemic has heightened demand for **high-quality Wi-Fi**, in building amenities, and flexible living arrangements. Build-to-rent properties offering these features have become more attractive to renters seeking work-life balance."

Nick Biring, BTR News



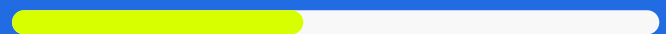
Lockdown effect stats



see stability from their provider as a must-have



view stable services from core utilities, like water and gas, as essential



45% work from home at least some of the time

1 in 5



Brits feel unwilling to bend on a **reliable internet connection** into their home.

Innovation for all

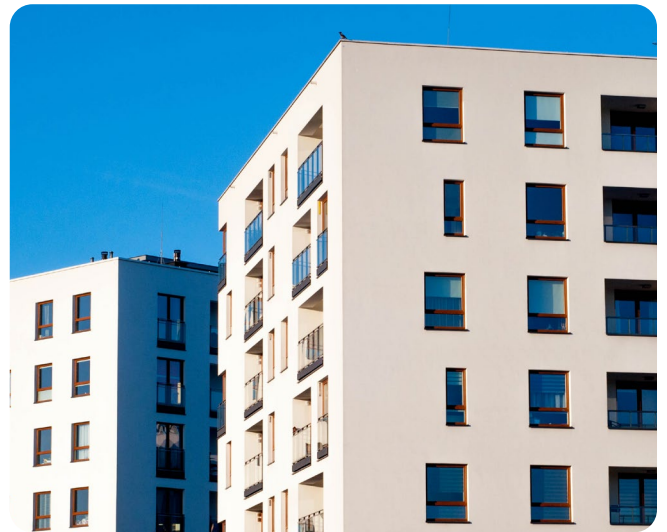
It's not just Gen-Z and Millennials who are benefiting from modern rental living; connectivity and technological innovations are also transforming the lives of those in later living. At Birchgrove, technological integration is redefining traditional care, creating safer and more engaging environments. Honor Barratt, CEO of Birchgrove, underscores the significance of this approach: "The use of AI and smart technology in our residences is not just about convenience; it's about ensuring our residents' safety and enhancing their quality of life."

One standout innovation is the Nobi system, which utilises AI to monitor residents' movements and detect falls. This system learns individual habits and can alert staff to any unusual changes, providing a critical layer of safety.

As Barratt explains,

"It'll learn how a resident walks. And then when it notices that their gait is changing, it'll send us an alert and say, something's wrong with them."

This proactive health monitoring helps prevent accidents and supports longer, independent living.



Reliable connectivity is crucial for the operation of such advanced technologies.

Reliable connectivity is crucial for the operation of such advanced technologies. By ensuring robust internet access, Birchgrove enables the continuous functionality of these systems, safeguarding residents and providing peace of mind to their families.

Embracing technological advancements allows staff to focus more on human-centric care. While technology enhances efficiency and safety, the human touch provided by on-site staff remains crucial to residents' well-being and satisfaction. This balance is key to Birchgrove's approach.

Looking ahead, the integration of AI and advanced technologies is expected to play a significant role in enhancing human interactions across all rental communities, ensuring a higher quality of life for all residents.



Sustainable housing on the horizon

The pressure is on the real estate sector to innovate to meet the rising expectations for sustainable, carbon-friendly homes. And our professionals are feeling it.

The sustainability issue is threefold: identifying the causes of energy inefficiency, standardising carbon assessment across the industry, and investing in build materials and tech, connectivity and processes which mitigate these effects. And looking ahead to the next 20 years, over a third (35%) of real estate professionals are concerned about the cost of climate mitigation and the implementation of associated technologies.

Innovations in building material may be the place to start to help reduce embodied carbon and improve the energy efficiency of homes across their lifetime. The carbon output of a home is more than a snapshot in time, with a property going through the eras of both construction and operational habitation. Jon Di Stefano from Greencore believes the industry has a responsibility to reduce this carbon output across the life of the property:

“Greencore Homes is focused on reducing carbon emissions in house building both in terms of energy efficiency and embodied carbon in construction. An average house, built of traditional masonry, emits between three and five tonnes of carbon a year in operation and around 100 tonnes of carbon during construction. We need to use different building materials like timber to reduce the carbon impact of new construction wherever possible.”

“Sustainable homes are achievable, but work must be done to make sure potential customers, local authorities and other partners really understand the benefits those homes. Our homes are built using natural materials, locking up carbon rather than emitting it and are extremely energy efficient.

They are the homes we need to tackle the joint challenges of a housing shortage and protecting our climate.” Anna Strongman, CEO of Oxford University Development with over 13 years of experience at Argent, takes us through a perspective within the industry:

“I definitely think there’s a real and **growing awareness about embodied and operational carbon**. Personally, I am involved in building low density housing, but even so I feel the pressure does not necessarily come from the customer base but from the investor base. Which is a positive, because if investors care about reducing carbon, then there is funding to be had to make real change.”



35%

of real estate professionals are concerned about the cost of climate mitigation and the implementation of associated technologies over the next 20 years

Dan Batterton adds: “I think that the build-to-rent sector should really take a leadership position in terms of long-term carbon reduction across the UK. But there’s isn’t a one-size-fits-all solution for sustainable housing. Differences in actual in use energy efficiency, even between two identical apartments, can often be stark.”

Matthew Weiner & Ben Harshak, co-founders of The SoCo, echo this concern for not just identifying the cause of energy inefficiencies but also standardising the system of measurement

“When I’ve asked two different practices to do a carbon assessment for the same building, we can receive two radically different results because there’s **no standard set of methodology**. If we want to reduce the amount of carbon and energy wastage within build-to-rent, this standardisation of carbon accounting is something we must overcome.”

Embracing the future

Looking to our survey of those within the sector, there was an optimistic view surrounding the uptake of new industry technologies and processes.

In 2019, when our study was previously conducted, a fifth (21%) of those surveyed believed new industry technologies and operations, such as Building Information Modelling, posed a challenge to their working lives, as the industry worked to understand and incorporate these processes. Now, in 2024, just 5% share this view, demonstrating that new technologies have been more readily adopted by the industry or have shown a key benefit.

Similarly, those surveyed in 2019 had a greater concern about the disruptive role innovations in technology might play, with 18% considering it a major challenge to be overcome. In 2024 however, this has dropped to 7%, indicating that new technologies introduced within the last five years have had a positive impact.

Technology will be integral for solving the foreseen issues facing the build-to-rent industry over the next 20 years. whether that be sustainable homes, connectivity or meeting the demands of the customer. Now that the benefits of these tech innovations are understood, many want the sector to embrace them, and fast. For three in five (61%), technological advancements within the sector such as fibre-optic broadband and energy-saving tech have felt slow to rollout.

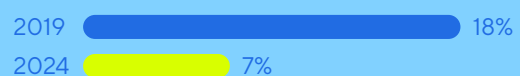


Change in opinions (2019 to 2024)

Percentage of people who think the uptake of new industry technologies and processes pose a challenge to professionals



Percentage of people who are concerned about the disruptive role innovations in technology could have



Matthew Weiner and Ben Harshak believe that the pursuit of efficient homes will drive tech innovation in the sector: “Anything that improves efficiency is going to be adopted quickly because the residential market is all about gross to net. And anything that improves my gross to net margin is going to make my building more efficient, give me more net operating income, and give me higher capital value than my peers.”

As for tech which is already making an impact, in-home sensors are a current innovation which our experts believe will see wider application in the future. ‘Internet of Things’ developments, such as smart sensors within the home, could have knock-on benefits to the industry at large by collecting data and helping us to understand the sustainability efficiencies in the homes they build.

Biring says:

“Build-to-rent operations heavily rely on technology for building performance monitoring, amenity usage tracking, and maintenance requests. Data analytics help operators understand resident behaviour and optimise services.”



Matthew Weiner and Ben Harshak continue, focusing on the data collection issue: “The integration of IoT and advanced building performance monitoring is set to revolutionise residential real estate. As sensors become ubiquitous and affordable, the wealth of data generated will enable more informed decision-making and improved operational efficiencies. However, the industry faces challenges in effectively analysing this data and deriving actionable insights.”

Whichever form this technology takes, whether the sensor format evolves or inspires further development, the goal is clear: more, and clearer, data from our homes. Dan Batterton says: “IoT and data analytics are crucial for efficient building management and fault prevention, and their importance will only grow as they are incorporated more into the build process. What we must watch out for now is that policy keeps pace with tech development. GDPR restrictions will play a huge role in how data is collected and drives decision-making in the sector.”



The tech behind the spec – a view from Hyperoptic and RUCKUS

Connectivity solutions for multi-dwelling units

In multi-family rental buildings, reliable and high-performance connectivity is crucial. As evidenced by the research in this paper, residents need seamless internet access, while property managers require robust network solutions to support building management systems (BMS) and Internet of Things (IoT) devices.

Reliable connectivity for residents

Providing consistent, high-speed internet access is challenging due to numerous residents with multiple devices. Access Points (APs) excel in high-density environments, delivering a seamless online experience.

Simplified network management

Managing a network can be complex, requiring consistent performance whilst ensuring network security.

Enhancing building management systems

Building Management Systems (BMS) are essential for efficient operations, controlling HVAC, lighting, and security.

Supporting IoT devices

IoT devices, from smart thermostats to security cameras, require reliable and secure connectivity.

Future-proofing with Wi-Fi 7

As technology evolves, buildings must adapt to new connectivity standards. Wi-Fi 7, or 802.11be, which promises higher speeds and greater capacity, supporting more devices and demanding applications.

By combining Hyperoptic’s full fibre broadband and professional services powered by RUCKUS technology, we can provide connectivity solutions tailored to the unique challenges of multi-family rentals, ensuring:

— **Reliable connectivity** underpinned by Hyperoptic backhaul and RUCKUS patented technology

— **Converged network and security** for IoT, staff, residents, and guests

— **Building network management** from a Managed Wi-Fi service provider

— **Future-proofing** utilizing the latest wireless technology

Hyperoptic, in partnership with RUCKUS technology, enables customers to stay ahead in the ever-changing and growing connectivity landscape, especially with Wi-Fi 7.

Conclusion

The demands on our buildings and homes are changing, but this study reveals an optimism that the real estate industry can keep pace with the demands of a fast-changing world.



Our report paints a broad picture of the state of the industry with these key messages:

1. The industry is listening

A lot can change in five years. In 2019, when we previously conducted our study, there was an overall sense that we were facing a serious disconnect between the needs of the customer and the professionals tasked with meeting those needs. Now, in 2024, the picture is more optimistic. The real estate industry recognised that change was coming, and in response they listened to the investors and renters to implement and embrace fast paced technological changes.

Change can often be slow to action in real estate - planning, bureaucracy and construction are all elements of the sector which take time. But this study has identified uncharacteristic engagement where the industry appears to have gone to significant lengths to reach out to customers and to understand what they want from their homes.

2. Connectivity is the key to data and operational insight

Data will unlock the understanding of building performance and support the delivery of both financial and sustainability. In our previous study in 2019, it's safe to say there have been changes on a global level that reframed how we live, work and more specifically see our homes. The Covid-19 pandemic forced a drastic and rapid change upon the global community, and while we adapted, few of us have forgotten the upheaval and uncertainty of that time or reverted to how we lived before. Using a wide range of specifically resourced data, this study demonstrates that it is impossible to overstate how critical connectivity is to all key stakeholders - which are identified as the most significant challenges to developers, investors and operators today. The speedy uptake of in-building technology like sensors and 'Internet of Things' will in deliver accurate and actionable data, to a point where it influences key decision-making in how buildings are designed and used. Economical homes, energy efficient homes, social and connected communities - are key aspirations of the sector for which a data-driven approach will facilitate real progress.

Alongside the positive messages above that we have listened and responded to the customers' needs, advances in technology will enable each building and home property to be their own data hub of insights into how the home is being used, how well it is functioning and serving the customer, and ways that, current and future developments can be optimised to meet these needs better.

3. Connectivity at home is crucial

Since our previous study in 2019, it's safe to say there have been changes on a global level that reframed how we live, work and more specifically see our homes. The Covid-19 pandemic forced a drastic and rapid change upon the global community, and while we adapted, few of us have forgotten the upheaval and uncertainty of that time or reverted to how we lived before. Using a wide range of specifically resourced data, this study demonstrates that it is impossible to overstate how critical connectivity is to all key stakeholders.

Connectivity in the home became an imperative in the years' 2020-2022 and it is absolutely clear that it should remain a priority for the industry, as lives continue to become increasingly digital and reliant on stable, seamless and secure connectivity.

Contributors



Dana Tobak,
Co-founder and
CEO of Hyperoptic

An industry pioneer, with over two decades leading the change within the broadband industry, Dana was awarded a CBE for her services to the digital economy in the New Year's Honours list in 2018.

As one of only a handful of female trailblazers for the telecom industry, she made it her mission to solve the sector's biggest challenge of poor network speeds in 2004 with the launch of Be Unlimited and again in 2011 when she co-founded Hyperoptic, the UK's first residential gigabit broadband network (offering unprecedented 1Gbit/s symmetrical speeds at a time when the average download speed was just 6.8Mbit/s).

Fast forward to today, she remains at the helm of Hyperoptic which passes over 1.73 million premises* across the UK, serving more than 350,000 customers. Tobak's leadership has seen the company scale while maintaining impeccable standards of service, ensuring that the customer has remained at the heart of everything they do. This customer-first mindset has resulted in Hyperoptic receiving Which? Great Value endorsement in 2024 and an "Excellent" rating on Trustpilot. This achievement, particularly in a market saturated with competitors, underscores Dana's strategic acumen and passion for innovation, strengthened by the experience of her team who, much like Dana, are committed to creating a great place to work for their teams.

Dana's impact extends beyond broadband. She is deeply invested in nurturing the future generation of tech leaders. Through active participation in community outreach programs and engagements with local schools and panels, Dana shares her insights and experiences, igniting the flames of innovation in young minds.

*Correct as at 1 July 2024



Debra Yudolph,
Founder and CEO,
SAY Property Consulting

Debra brings over 25 years of expertise in residential property. Based in London, SAY specialises in providing strategic operational asset advice for both existing and planned developments, with a focus on residential-led projects across the UK, Europe, and the UAE.

Before establishing SAY, Debra served as Director of Asset and Property Management at Grainger plc for a decade. She is recognised as an authority in residential property and asset management, particularly in rental living and the development of new communities. Debra advocates for incorporating future economic viability into the planning and development stages, emphasising that strategic operational advice is crucial for creating and maintaining successful and sustainable communities.

In May 2024, Debra was honoured with the title of Residential Property Personality of the Year by Property Week. Beyond her role at SAY, she holds non-executive positions with Grove End Housing Limited, Deverell Smith Recruitment, Jewish Care, and the M&G Shared Ownership Fund.



Dan Batterton,
Head of Residential –
Legal & General Investment
Management

Dan Batterton is Head of Residential at L&G Asset Management. Launching the Build to Rent strategy in 2016 the portfolio has grown to over £3.0bn and just under 10,000 apartments in development or in operation spread across the UK. The portfolio is expected to grow to £5bn within 3 years. In 2024 the platform also expanded to incorporate the businesses first operational PBSA assets.

Dan has over 20 years' experience in the property sector and his exceptional understanding of portfolio strategy have been utilised to design L&G's long-term acquisition, development, sustainability and operational strategy for the Residential sector. He leads the specialist BTR team at L&G that is delivering 1,000 new BTR homes per year.



Honor Barratt,
Chief Executive - Birchgrove

Honor is the CEO of Birchgrove, a specialist age-exclusive developer working to establish a portfolio of assisted living neighbourhoods with well thought-out facilities for rent. Central to Birchgrove's proposition is the belief that renting instead of owning a home is the most liberating form of tenure, allowing neighbours to retain their independence without the burden of homeownership. Of the nine developments currently in the portfolio, Birchgrove has a bunch of happy neighbours in Sidcup in Kent and two neighbourhoods open in Woking and Ewell, both in Surrey. Following closely behind are Banstead, Godalming, Leatherhead - all in Surrey - and most recently Chiswick, Hampton Court and Mill Hill in London. Honor is currently looking for opportunities to co-locate her oldies at the heart of a wider development on a forward fund or forward commit basis.



Jon Di Stefano,
CEO - Greencore Homes

Jon spent 20 years as CFO and then CEO of Telford Homes Plc where he oversaw significant and sustained expansion in both business scale and profitability. Jon joined Greencore as CEO in October 2022.



Nick Biring,
BTR News

Nick is Co-founder of BTR News, PBSA News and BTR News Australia and is a Property Expert, having spent many successful years in the property industry.



Anna Strongman,
CEO, Oxford University
Developments

Anna Strongman is CEO of Oxford University Development (OUD), a joint venture between Oxford University and Legal & General set up to build Innovation Districts and subsidised accommodation for graduate students and the university workforce.

Anna was previously Managing Partner of Argent LLP in London, where she spent 12 years executing a range of asset, development, and business planning projects. Highlights included leading the Asset Management of King's Cross, developing Coal Drops Yard, and setting up a BTR portfolio with JV partners Related. Anna was instrumental in building the business from 40 people to a team of 200 over a ten-year period and led the corporate side of the business as Managing Partner.

Before joining Argent, Anna worked in the planning and economic development team of Arup, worked for DTZ in Scotland, and lived for 18 months in Japan, where she studied Japanese and conducted research at the Japan Productivity Centre as a Daiwa Scholar.



Matthew Weiner,
Co-Founder, The SoCo

Matthew co-founded The SoCo having previously been the Chief Executive Officer of U+I PLC, the regeneration specialist. Having pivoted the business from Central London commercial to UK wide regeneration projects, Matthew has long advocated for high quality design and placemaking in order to better the lives of future residents.



Ben Harshak,
Co-Founder, The SoCo

Ben has a background in housebuilding and Build to Rent. This, combined with his personal experiences as a young renter in London, has driven Ben to explore various solutions for young renters in urban locations. Ben is tireless in his pursuit of fair, safe and healthy housing to supplement the existing housing stock in the UK.

Authored by:



Esme Webb,
SAY Property Consulting

Esme is a consultant and Head of hereSAY, SAY's lead-to-lease mystery shopping service. With eight years of experience in the sector and a background in research and operations, Esme has conducted numerous research projects for SAY clients across all sectors.



Jenny Kyne,
SAY Property Consulting

Jenny is a dedicated consultant at SAY, specialising in operations within both leasehold and rental markets. With nearly four years of industry experience and a background in property management, Jenny now focuses on later living and Build-to-Rent (BTR) sectors.