



Pe-Workshop Survey: Unlocking Downtime in Offsite Manufacturing

1. Executive Summary

1.1 Purpose of the survey

- To quantify production capacity, downtime patterns and appetite for a marketplace to optimise offsite modular manufacturing.

1.2 Headline findings

- Downtime is **widespread and structural**: most respondents report **10–25% under-utilised capacity**, with downtime occurring at least annually and often quarterly.
- There is **strong but conditional interest** in a capacity-sharing marketplace, with a majority willing to list and bid for projects.
- Respondents expect **targeted, collaborative government support**, particularly grants for collaborative projects and tax incentives for efficiency.

1.3 Implications for the Downtime Sprint Framework

- The framework must tackle **pipeline instability, procurement and planning friction, and cash-flow risk**.
- A **shared-capacity pilot** needs clear guardrails (standards, QA, insurance, confidentiality).
- Government and trade bodies should be positioned as **enablers and convenors**, not operators.

2. Background and Objectives

2.1 Context

- Modular and offsite manufacturers face **cyclical demand, quiet pipelines and costly downtime**.
- Timber's **sustainability and design flexibility** make it a candidate for shared solutions.

2.2 Survey Objective

- “This survey aims to gather insights into production capacity, downtime patterns, and potential interest in using a marketplace to optimise offsite modular manufacturing.”

2.3 Link to wider programme

- Survey informs:
 - **Downtime Workshop** (11 November)
 - Development of a **Downtime Sprint Framework**
 - Preparation for **Workshop 4** and a pilot proposal to UK Government.

3. Methodology

3.1 Survey design

- Online questionnaire covering:
 - Downtime incidence and frequency
 - Under-utilised capacity
 - Appetite for a shared marketplace
 - Views on AI-based matching
 - Desired forms of government support.

3.2 Sample

- **13 respondents** from UK-based offsite and modular manufacturers.
- Senior roles: **CTO/CFO/COO (5), Operations Manager/Director (3)**, plus technical and engineering leads.

3.3 Limitations

- Modest sample size but **high decision-making seniority**.
- Self-reported data; indicative, not statistically representative.

4. Respondent Profile

4.1 Organisation type and MMC system

- Mix of MMC types (multi-select responses):
 - Timber and hybrid timber systems
 - Light gauge steel (LGS)
 - Panelised systems
 - Insulated concrete formwork (ICF)
 - Other offsite / modular solutions.

4.2 Role and responsibility

- Majority with responsibility for:
 - **Factory operations and capacity planning**
 - **Commercial and financial performance**
 - **Strategic decisions on technology and market entry.**

5. Key Findings

5.1 Downtime is widespread and non-trivial

5.1.1 Incidence and perceived frequency

- **11 of 13** respondents report experiencing downtime.
- Response distribution (see **Figure 1**):
 - “Sometimes” – 6
 - “Often” – 2
 - “Very often” – 1
 - “Always” – 1
 - “Seldom” – 1
 - “No” – 2

5.1.2 Recurrence over time

- When downtime occurs, it tends to recur:
 - **Annually – 7**
 - **Quarterly – 4**
 - **Monthly – 1**
 - **Weekly – 1**

5.1.3 Scale of under-utilised capacity

- Typical under-utilisation bands (see **Figure 2**):
 - **10–25% under-utilised – 7 respondents**
 - **Less than 10% – 4**
 - **25–50% – 2**

Interpretation: Downtime is **structural**, not exceptional. Many factories regularly carry **10–25% idle capacity**.

5.2 Appetite for a shared-capacity marketplace

5.2.1 Willingness to participate

- Attitudes to a central capacity marketplace:
 - “Yes, we would actively list and bid for projects” – **6**
 - “Yes, but only to search for capacity” – **2**
 - “Yes, but only to list capacity” – **1**

- “No, we prefer to manage capacity internally” – **4**

5.2.2 Role of AI-driven matching

- Response to AI-based project–factory matching:
 - “Yes” – **7**
 - “Maybe, would need more information” – **6**
 - “No” – **0**
- Importance of AI recommendations:
 - “Extremely important” – **4**
 - “Somewhat important” – **4**
 - “Neutral” – **4**
 - “Somewhat not important” – **1**

5.2.3 Marketplace business goals

- Primary goals for marketplace participation:
 - “Both increasing revenue and reducing downtime equally” – **7**
 - “Increase revenue through new projects” – **4**
 - “Reduce downtime and optimise facility use” – **2**

Interpretation: A **clear majority** are prepared to engage with a marketplace, particularly if it improves **both utilisation and revenue**, with cautious openness to **AI support**.

5.3 Expectations of government support

5.3.1 Perceived role of government

- Could government funding or policy incentives help mitigate downtime?
 - “Yes” – **10**
 - “Maybe” – **2**
 - “No” – **1**

5.3.2 Preferred forms of support (multi-select)

- See **Figure 3 – Most valued forms of government support**.
 - Grants for collaborative manufacturing projects – **9 mentions**
 - Tax incentives for production efficiency improvements – **5**
 - Industry-led matchmaking initiatives to align projects with downtime windows – **3**
 - Access to low-interest financing for facility optimisation – **3**

- Other – 2

5.3.3 Themes from open comments

- Concern about:
 - **Lack of reliable pipelines and promises not materialising.**
 - **Delays on live projects** as a major downtime driver.
 - Need for **trade bodies** to be central to standard setting and coordination.
 - Importance of **funding responsible, evidence-based expansion**, not just new capacity.

Interpretation: Respondents want **targeted, collaborative interventions**—especially **co-funded projects and tax incentives**—with **strong trade-body involvement**.

6. Implications for the Downtime Workshop and Sprint Framework

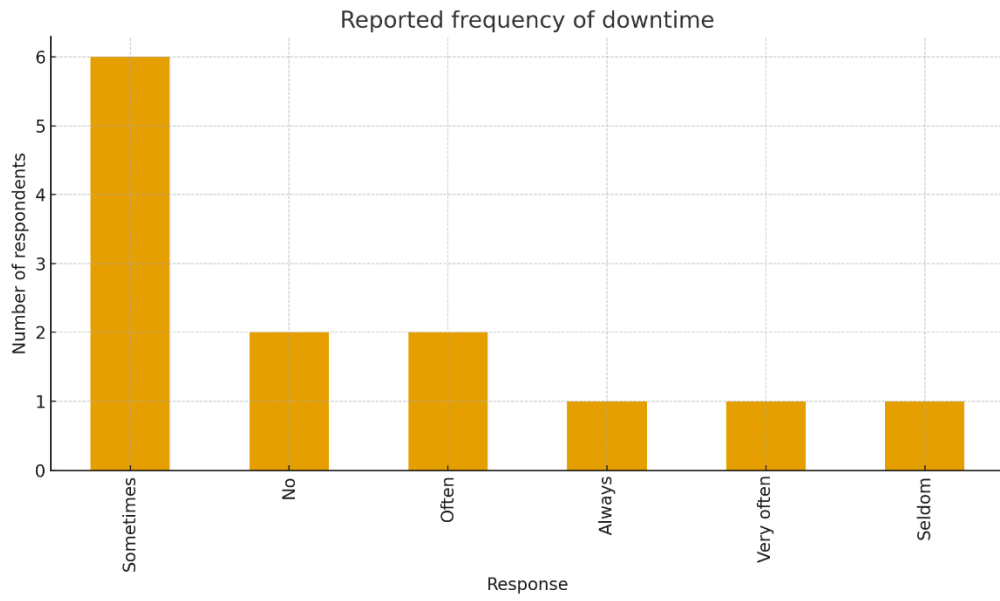
- 6.1 **Evidence of structural downtime** to justify action.
- 6.2 **Validation of shared-capacity exploration** via a marketplace / platform.
- 6.3 **Clear mandate** for government-supported pilots and policy changes.
- 6.4 **Need to address procurement and planning friction** (to be elaborated using workshop/Miro findings in Report 2).

7. Recommendations (Survey-Driven)

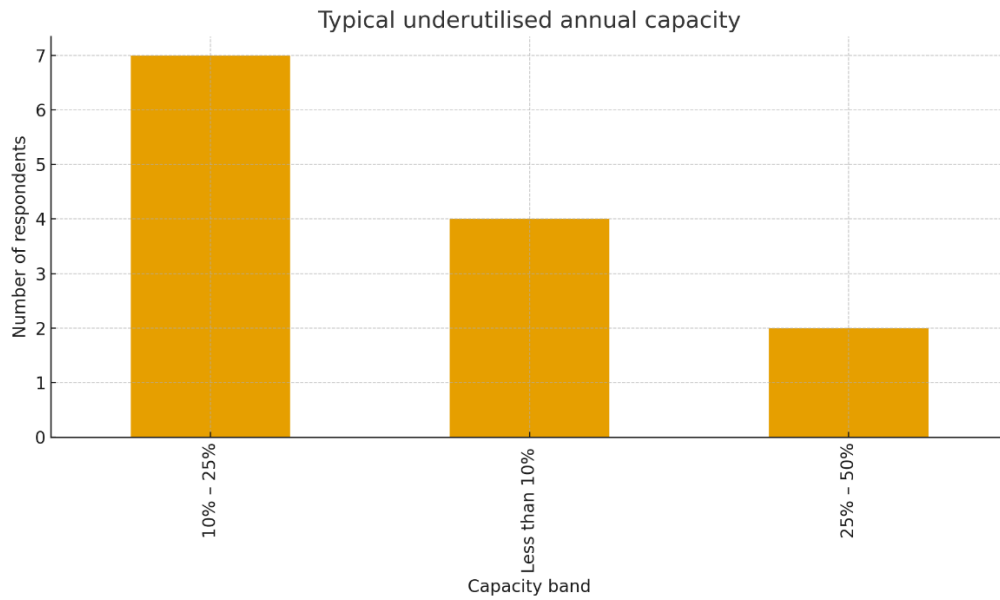
- 7.1 **Recognise downtime as a systemic risk**
- 7.2 **Progress a shared-capacity pilot** with industry governance
- 7.3 **Design a targeted support package** (grants, tax, matchmaking, finance)
- 7.4 **Embed evidence-based MMC standards** through trade bodies and policy.

8. Figures and Tables

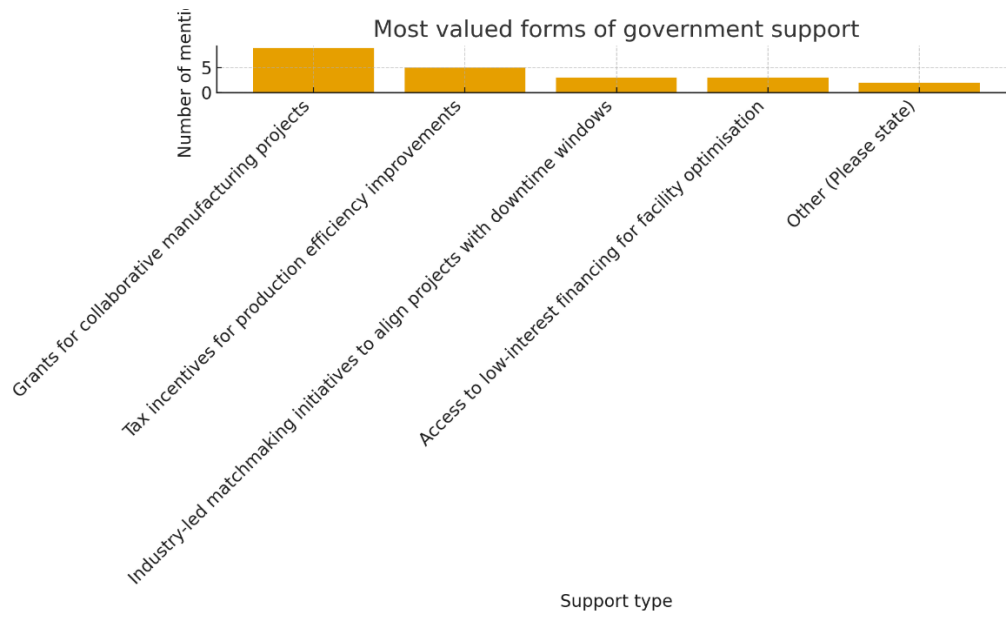
- **Figure 1:** Reported frequency of downtime (bar chart).



- **Figure 2:** Typical under-utilised annual capacity bands (bar chart).



- **Figure 3:** Most valued forms of government support (bar chart).



9. Appendices

- Appendix A – [Survey questionnaire](#)
- Appendix B – [Detailed response tables](#)

