



ECONOMICS



UK Residential Market Survey

October 2025

ECONOMICS

Buyer demand continues to soften with policy uncertainty feeding into a general sense of caution

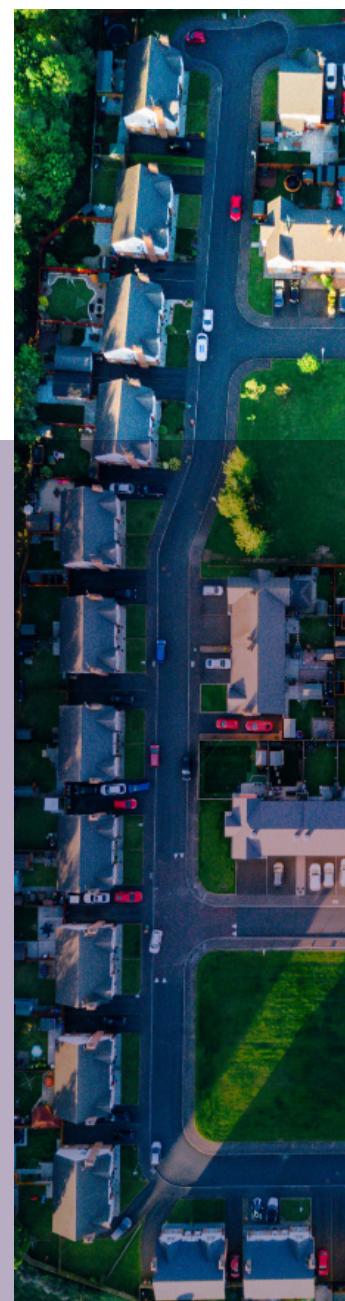
- **Headline indicators tracking sales market activity remain in negative territory**
- **House prices continue to face modest downward pressure at the national level**
- **Subdued backdrop expected to persist over coming months**

The October 2025 RICS UK Residential Survey results indicate that the sales market remains subdued, with measures of buyer demand and agreed sales still in negative territory. Anecdotally, comments from contributors suggest that uncertainty surrounding potential tax-raising measures in the upcoming Budget is contributing to the current cautious mood.

Focusing on the new buyer enquiries series, the October net balance of -24% represents a slight decline from -21% in the previous survey and marks the weakest reading since April. This continues to signal a contraction in buyer demand across the housing market as a whole, with most parts of the country seeing a consistently negative trend in recent months.

Unsurprisingly, this is feeding through into a decline in the volume of sales being agreed, with the latest net balance of -24% slightly more downbeat than the -17% recorded previously. Looking ahead, near-term sales expectations are broadly flat, reflected in a net balance of -3% (albeit this does show some improvement on -10% reported last time). Over a twelve-month horizon, a net balance of +7% of respondents anticipate a pickup in sales activity, notably less pessimistic compared to the -9% reading seen in the previous survey.

Rounding off the subdued picture for sales market activity, the new instructions indicator posted a net balance of -20% in October. Having been in positive territory for much of the past twelve months, this now represents the third consecutive negative reading and the weakest monthly figure since 2021. Likewise, the market appraisals series recorded a net balance of -37%, implying that



appraisal activity is running comfortably below levels seen twelve months earlier.

For house prices, the aggregate net balance of -19% is slightly below the -17% recorded in the previous survey but broadly in line with the average over the past three months. As such, this continues to indicate modest downward pressure on headline house prices. At the regional level, this trend appears particularly evident in the South East of England, London, and East Anglia, where the latest price net balances are somewhat weaker than the national average.

Looking ahead, a slight softening in prices is anticipated over the next three months, as reflected in a net balance reading of -12% for the forward-looking sentiment gauge. That said, the October figure is less downbeat than the -21% recorded previously and suggests only a modest further decline in prices in the near term. Moreover, over a twelve-month timeframe, a net balance of +16% of survey participants expect prices to return to growth at the national level.

Across the rental market, tenant demand has flattened recently, with the latest net balance of -4% (from the quarterly seasonally adjusted lettings dataset) easing from +5% and +13% in the preceding two quarters. At the same time, landlord instructions remain on a firmly downward trend, evidenced by a net balance reading of -33% in the three months to October (the weakest level since April 2020). While near-term rent expectations indicate a slight increase in rental prices, the latest net balance of +15% is noticeably softer than most readings observed over the past four years.



Methodology

About:

The RICS Residential Market Survey is a monthly sentiment survey of Chartered Surveyors who operate in the residential sales and lettings markets.

Regions:

The 'headline' national readings cover England and Wales.

Specifically the 10 regions that make up the national readings are: 1) North 2) Yorkshire and Humberside 3) North West 4) East Midlands 5) West Midlands 6) East Anglia 7) South East 8) South West 9) Wales 10) London.

The national data is regionally weighted.

Data for Scotland and Northern Ireland is also collected, but does not feed into the 'headline' readings.

Questions asked:

1. How have average prices changed over the last 3 months?
(down/ same/ up)
 2. How have new buyer enquiries changed over the last month?
(down/ same/ up)
 3. How have new vendor instructions changed over the last month?
(down/ same/ up)
 4. How have agreed sales changed over the last month?
(down/ same/ up)
 5. How do you expect prices to change over the next 3 months?
(down/ same/ up)
 6. How do you expect prices to change over the next 12 months?
(% band, range options)
 7. How do you expect prices to change over the next 5 years?
(% band, range options)
 8. How do you expect sales to change over the next 3 months?
(down/ same/ up)
 9. How do you expect sales to change over the next 12 months?
(down/ same/ up)
 10. Total sales over last 3 months i.e. post contract exchange (level)?
 11. Total number of unsold houses on books (level)?
 12. Total number of sales branches questions 1 & 2 relate to (level)?
 13. How long does the average sales take from listing to completion (weeks)?
 14. How has tenant demand changed over the last 3 months?
(down/ same/ up)
 15. How have landlords instructions changed over the last 3 months?
(down/ same/ up)
 16. How do you expect rents to change over the next 3 months?
(down/ same/ up)
 17. How do you expect average rents, in your area, to change over the next 12 months?
(% band, range options)
 18. What do you expect the average annual growth rate in rents will be over the next 5 years in your area?
(% band, range options)
- Questions 6, 7, 17 and 18 are broken down by bedroom number viz. 1-bed, 2-bed, 3-bed, 4-bed or more. Headline readings weighted according to CLG English Housing Survey.

Net balance data:

- Net balance = Proportion of respondents reporting a rise in prices minus those reporting a fall (if 30% reported a rise and 5% reported a fall, the net balance will be 25%).
- The net balance measures breadth (how widespread e.g. price falls or rises are on balance), rather than depth (the magnitude of e.g. price falls or rises).
- Net balance data is opinion based; it does not quantify actual changes in an underlying variable.
- Net balance data can range from -100 to +100.
- A positive net balance implies that more respondents are seeing increases than decreases (in the underlying variable), a negative net balance implies that more respondents are seeing decreases than increases and a zero net balance implies an equal number of respondents are seeing increases and decreases.
- Therefore, a -100 reading implies that no respondents are seeing increases (or no change), and a +100 reading implies that no respondents are seeing decreases (or no change).
- In the case of the RICS price balance, a reading of +10 should not be interpreted as RICS saying that house prices are going up by 10%, but that 10% more surveyors reported increases rather than decreases in prices (over the last three months).
- A change from +30 to +60 does not mean that the variable grew by 30% in one period and by 60% in the next period, but it does indicate that twice as many surveyors reported an increase compared to a decrease than in the previous period.
- Likewise, if we get a reading dropping from +90 to +5, this still means that more respondents are reporting increases than decreases overall, but the breadth of those reporting increases has fallen dramatically; meanwhile, a shift in the reading from -90 to -5 still means that more respondents are reporting decreases than increases overall, but the breadth of those reporting decreases has fallen dramatically.

Seasonal adjustments:

The RICS Residential Market Survey data is seasonally adjusted using X-12.

Next embargo date:

November survey: 11 December
December survey: 15 January 2026

Number of responses to this month's survey:

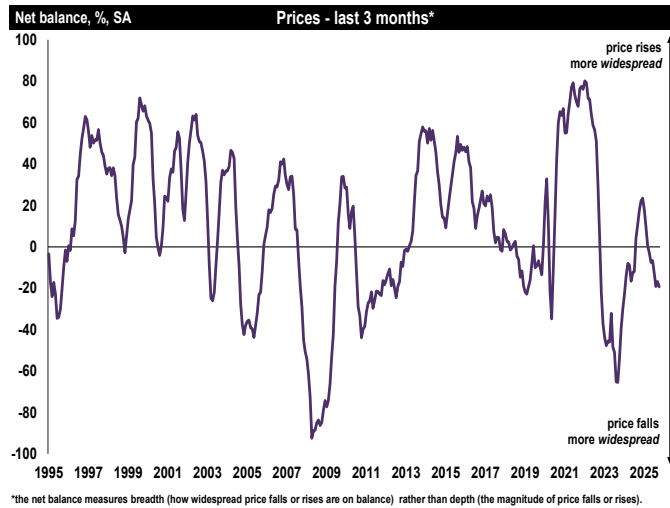
This survey sample covers 476 branches coming from 245 responses.

Disclaimer

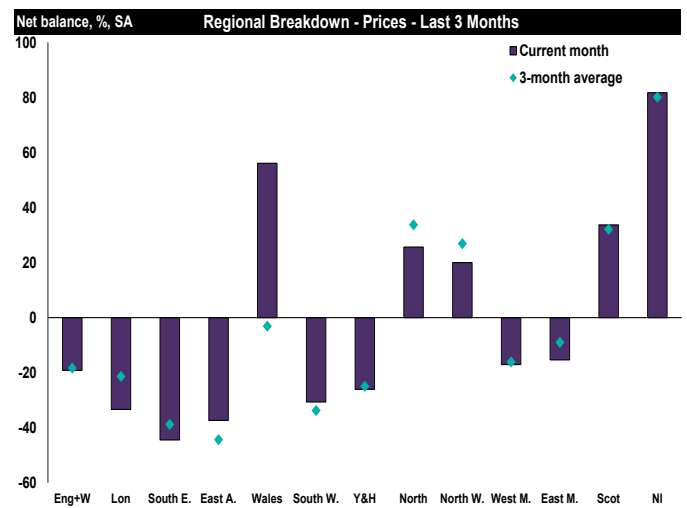
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Sales market charts

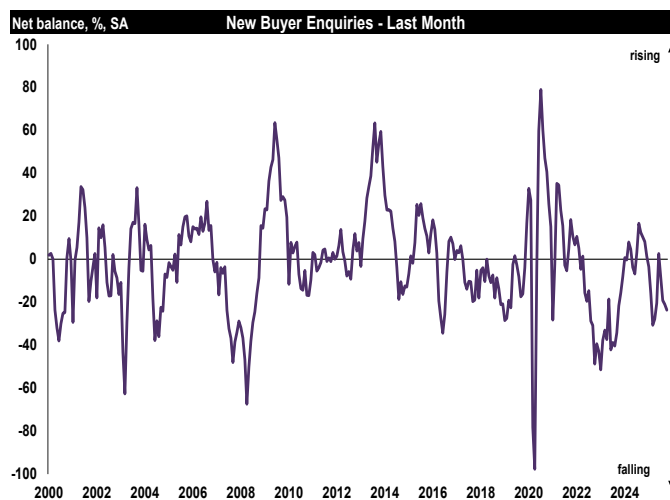
National Prices - Past three months



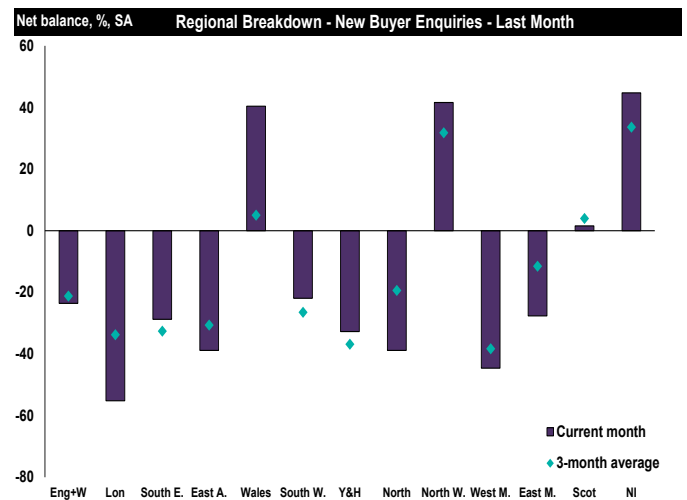
Regional Prices - Past three months



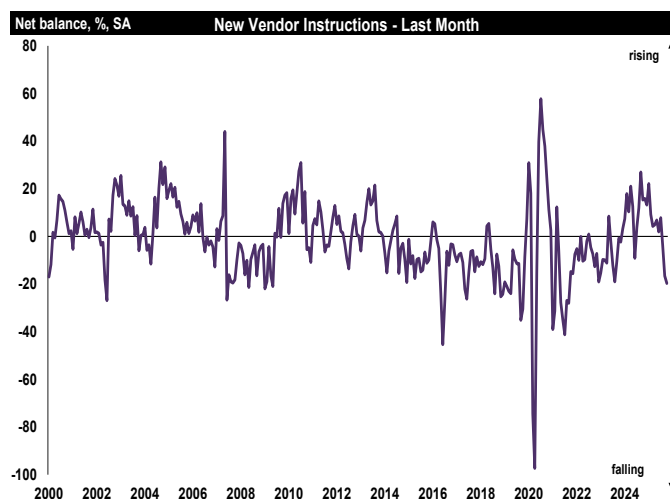
National New Buyer Enquiries - Past month



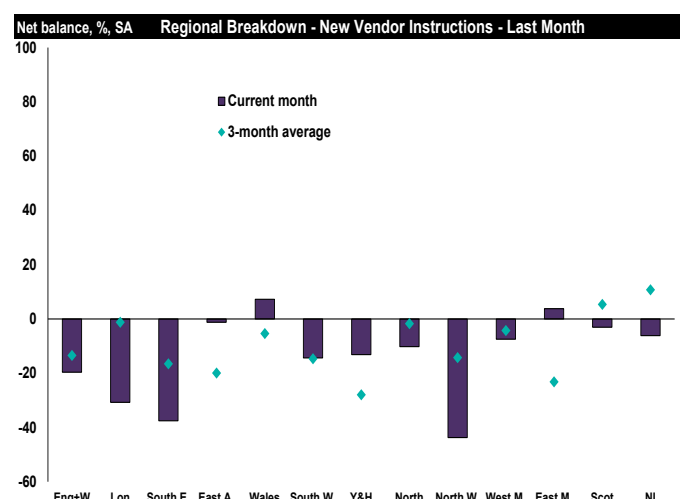
Regional New Buyer Enquiries - Past month



National New Vendor Instructions - Past month

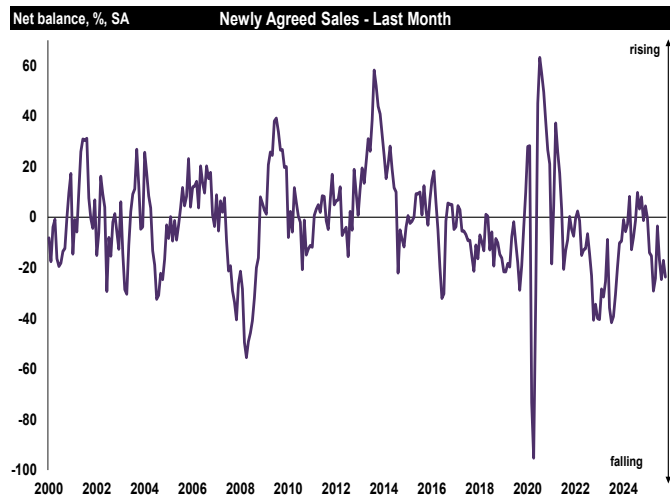


Regional New Vendor Instructions - Past month

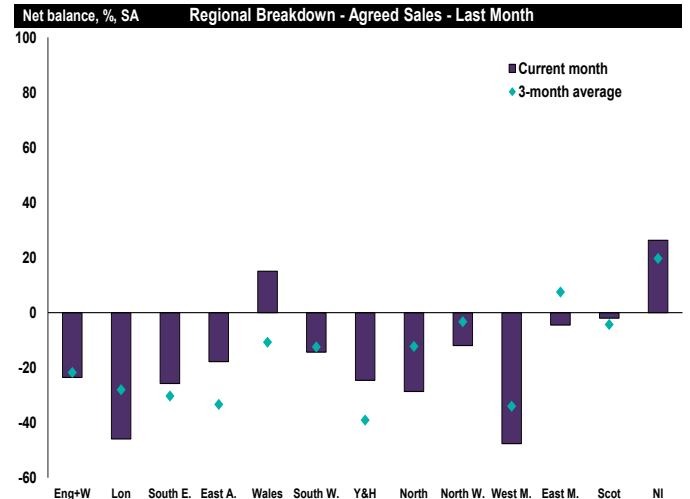


Sales market charts

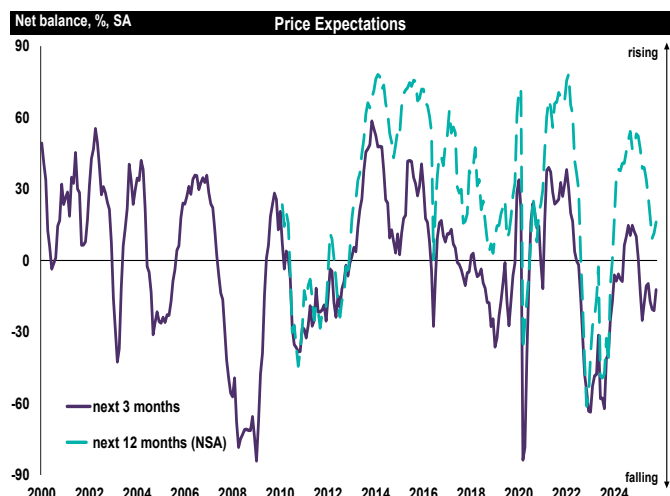
National Newly Agreed Sales - Past month



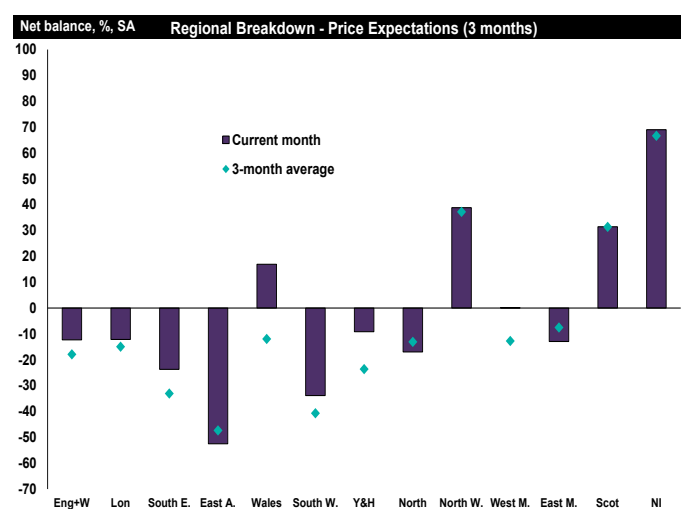
Regional Newly Agreed Sales - Past month



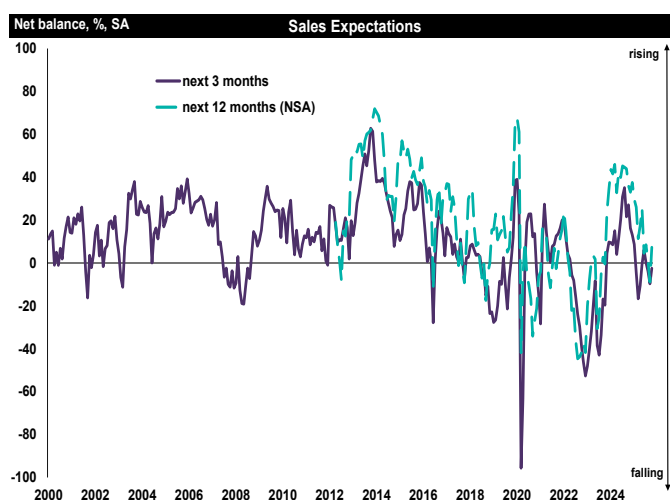
National Price Expectations - Three and twelve month expectations



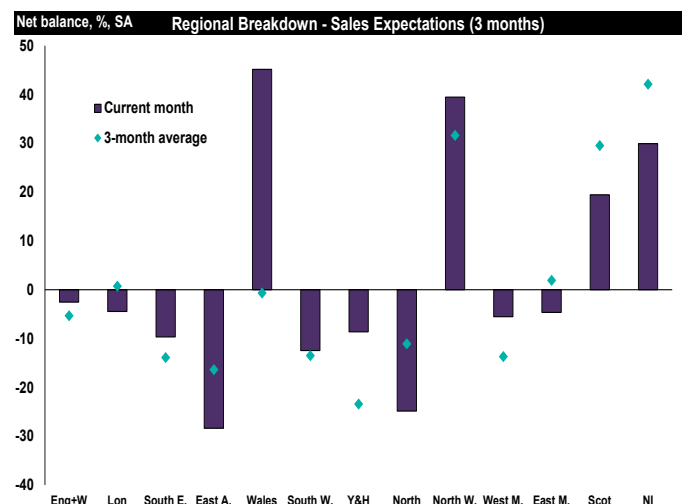
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

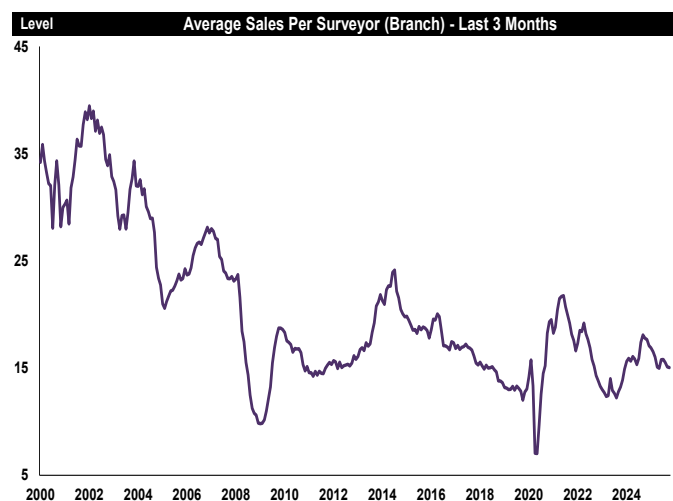


Regional Sales Expectations - Next three months

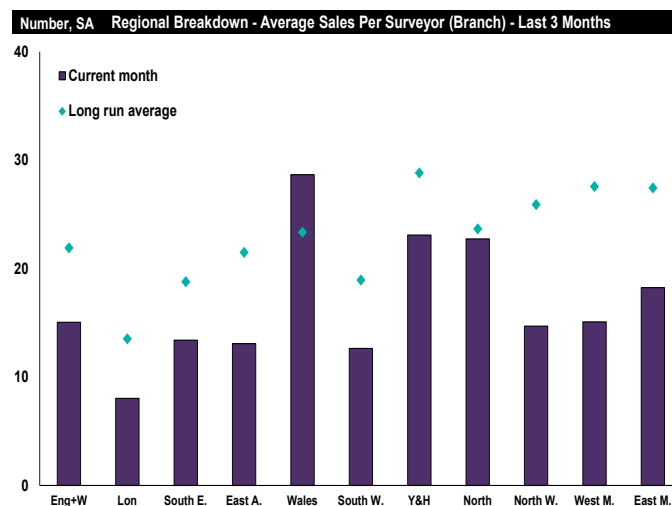


Sales market charts

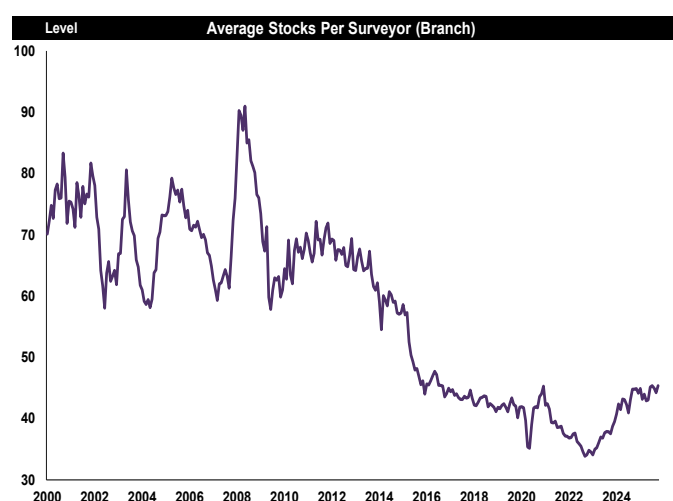
National Average Sales Per Surveyor - Past three months



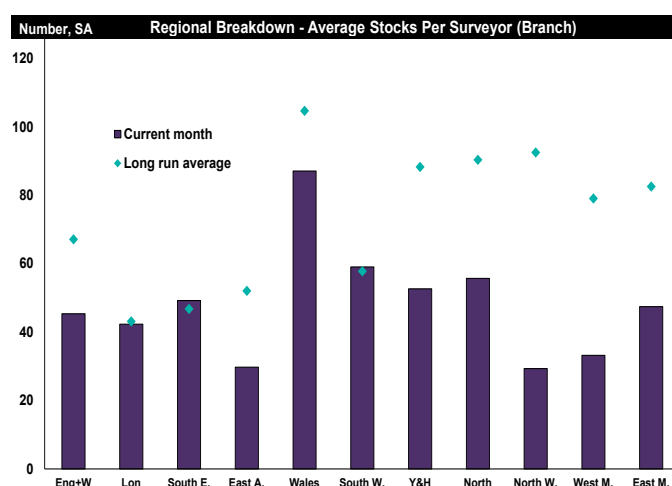
Regional Average Sales Per Surveyor - Past three months



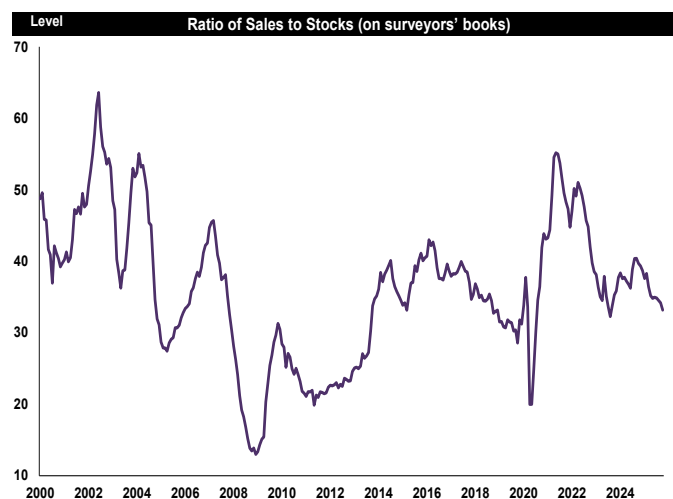
National Average Stocks Per Surveyor



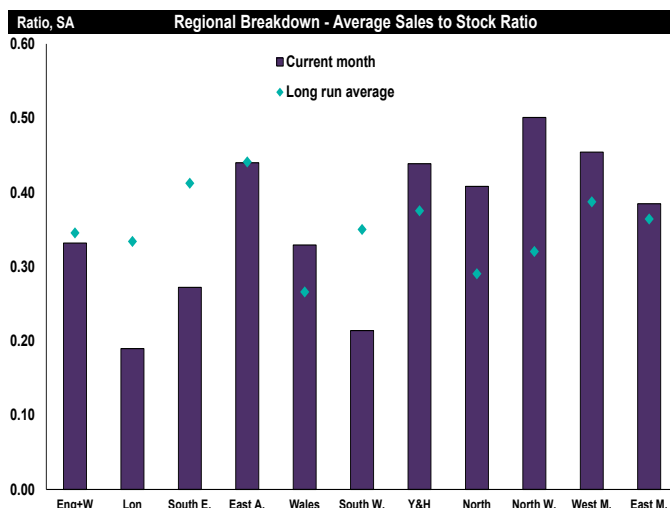
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

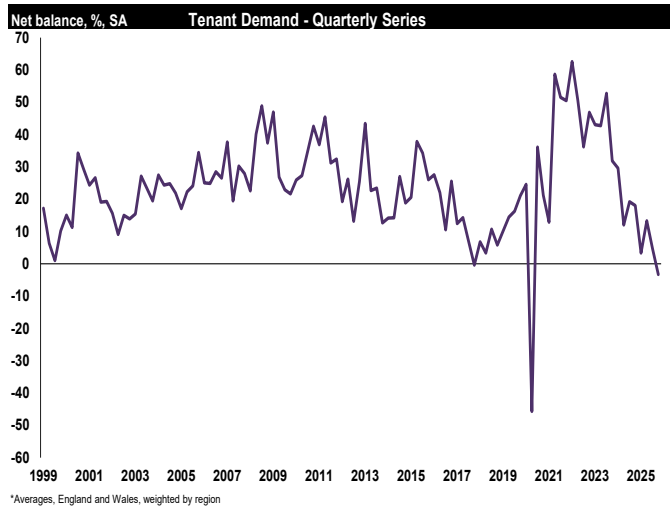


Regional Sales to Stock Ratio

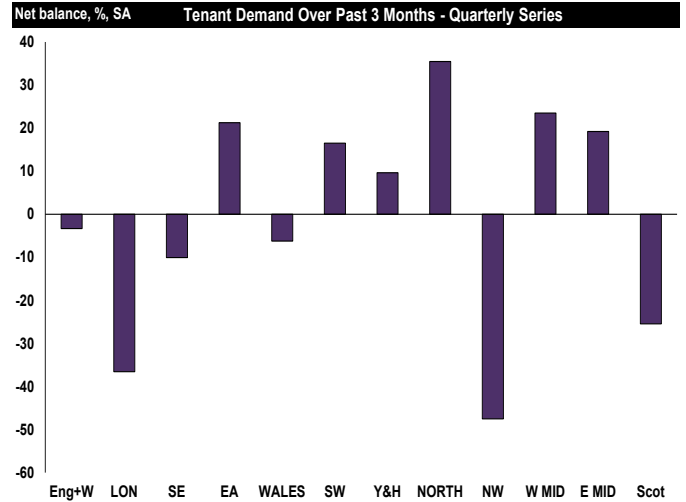


Lettings market charts

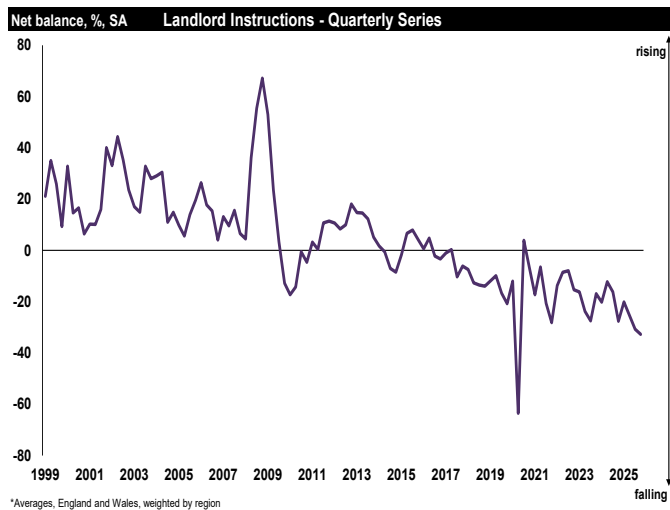
National Tenant Demand - Past three months



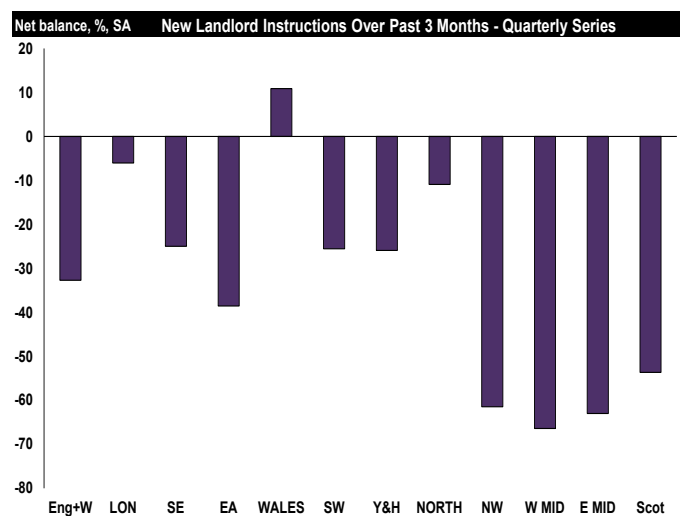
Regional Tenant Demand - Past three months



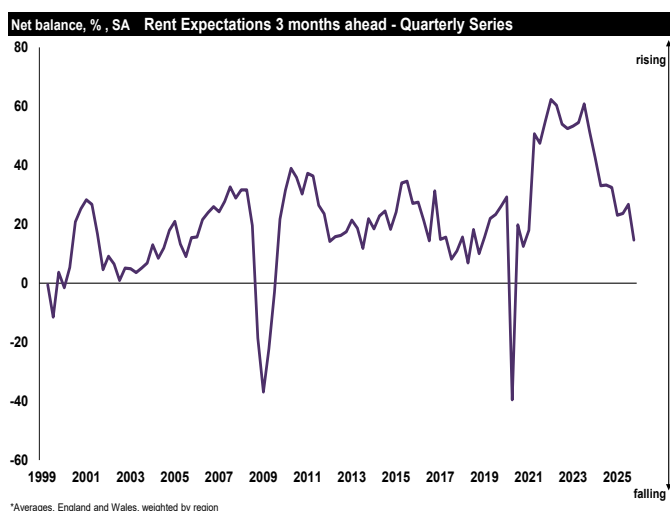
National New Landlord Instructions - Past three months



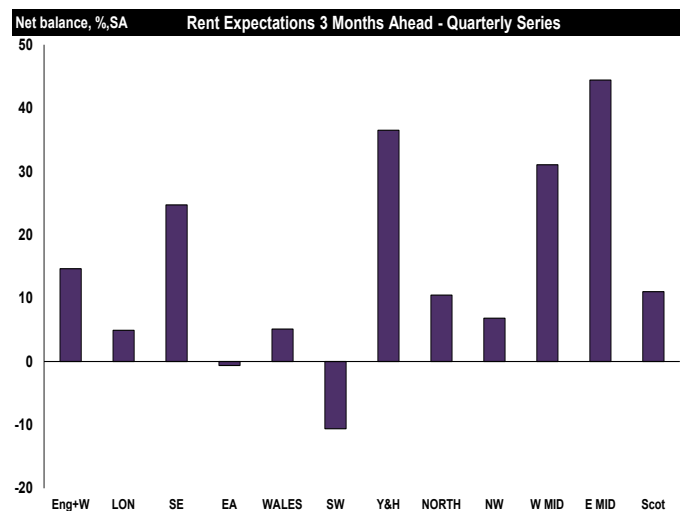
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

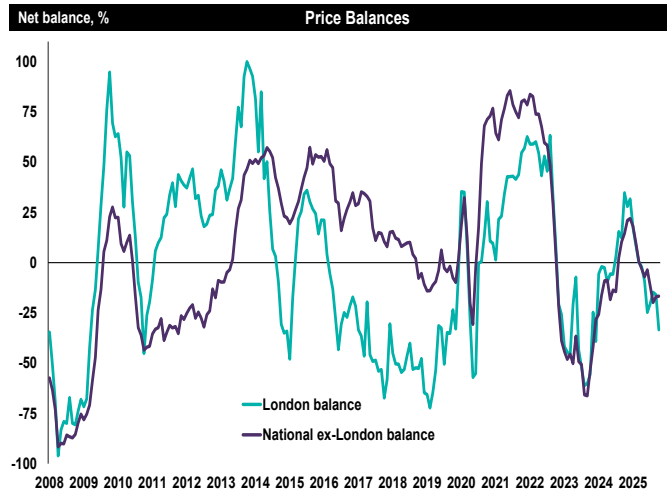


Regional Rent Expectations - Next three months

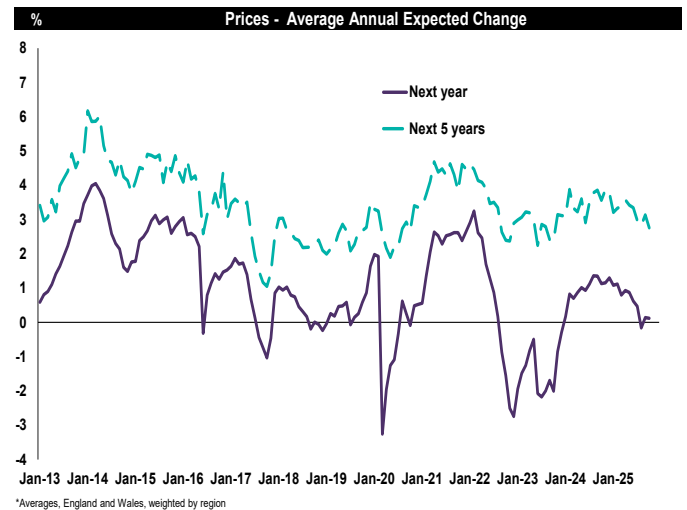


Expectations and other data

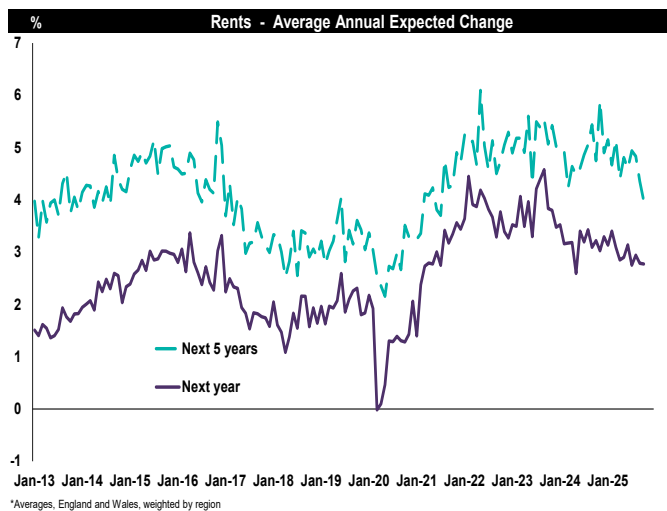
National Price Balance (excluding London) and London Price Balance - Past three months



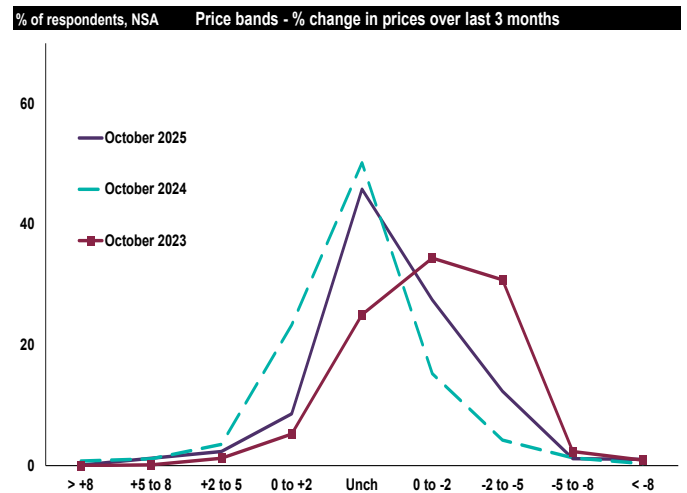
National Average Annual Expected Price Change (point estimate) - Next one and five years



National Average Annual Expected Change in Rents (point estimate) - Next one and five years



Price Bands - Past three months



Surveyor comments - Sales

North

John Gibson, MRICS, North East Estate Agents, jgibson@northeast-ea.co.uk, Middlesbrough - The government needs to review the stamp duty, and get rid of it in certain parts of the country to get the market moving again. I can understand the increase for the South but it has put a stop to the number of sales for BTL in the North.

Keith Pattinson, FRICS, keith pattinson, keith.pattinson@pattinson.co.uk, National - We offer a National Auction platform essentially for independent agents offering a service for serious sellers. Many sellers want to "try" an unrealistic price and damage marketing, often disappointed and agents do not charge for work. We get property sales pack for instant exchange, no fall throughs.

Neil Foster, MRICS, Walhouse Surveyors & Valuers, neil@walhouse.co.uk, Hexham & Newcastle Upon Tyne - The sales market appears to be in a state of suspended animation and the forthcoming budget, and it's impact on consumer confidence and affordability, looks most likely to herald in the doldrums (at best) with little hope of revival before the spring. All quite depressing for homeowners really!

Paul Mcskimmings, BSc(Hons)MRICS, Edward Watson Associates, paul@edwardwatson-assoc.com, Newcastle Upon Tyne - Busy month for the time of year. It will be interesting to see what effect, if any, the upcoming budget has on the confidence of buyers, sellers and the lenders.

Shaun Brannen, AssocRICS, Brannen & Partners, shaun.brannen@brannen-partners.co.uk, Whitley Bay & Coastal - Completions are approx 15% on the same time last year, though there is a noticeable 'slow-down' in the market over the past weeks.

Simon Hobbs, MRICS, London & City Estates Ltd, simonh@londonandcity.co.uk, Newcastle - Inertia due to pending budget.

Yorkshire & the Humber

Alex Mcneil, MRICS, Bramleys, alex.mcneil@bramleys.com, Huddersfield - I don't think I can recall such an anticipated budget with the potential to impact on the entire property market in so many ways. I suspect however that people will still need somewhere to live and will soon adapt to whatever challenges make the headlines.

Ben Hudson, MRICS, Hudson Moody, benhudson@hudson-moody.com, York - A very price sensitive market as buyers wait the outcome of the Autumn budget.

James Brown, MRICS, Norman F Brown, james@normanfbrown.co.uk, Richmond - Pre-budget the sales market remains in the doldrums.

James Horner, Mrics, McCabe, MRICS, David G Horner Ltd, james@davidghorner.co.uk, Wakefield - At the present time, the market appears to be "holding its collective breath" waiting for the outcome of the budget. Tuesday's speech will have done little to give confidence for the future.

Kenneth Bird, MRICS, Renton & Parr, ken@rentonandparr.co.uk, Wetherby - Many potential sellers are holding back until after the November budget, whilst buyers have more choice and competitively priced properties are selling well.

M J Hunter, RICS, GRICE AND HUNTER, griceandhunter@btconnect.com, Doncaster - As occurred last year, uncertainty and speculation regarding the November budget has had a negative impact on the property market.

North West

Amin Mohammed, MRICS, Brettgardner Ltd, accounts@brettgardner.co.uk, Greater Manchester - Mortgage approvals are rising modestly, hinting at a cautious recovery if rates ease. New taxation rules and reforms in the forthcoming budget will impede

growth, a wait and see if stamp duty is scrapped in favour of seller or buyer...

Andrew Holmes, MRICS, Milne Moser Estate Agents, andrew@milnemoser.co.uk, Kendal And South Lakes - There is still a pool of keen, motivated buyers in the market however the market is very sensitive to pricing with good quality and well presented homes proving to be the most popular.

David Champ[ion, MRICS & REGISTERED VALUER, CHAMPSURV, championdavid@ymail.com, Blackpool, Fylde Preston Wyre and Lancaster, West & East Lancashire - Some softening as Budget looms near and temporary seasonal decline in potential interest starts.

John Shackleton, MRICS, Roberts and Roberts Property Consultants Ltd, jss@robertsandroberts.co.uk, South Manchester - The property market has slowed recently in my view this will likely continue in the foreseeable future with confidence being affected.

John Williams, FRICS, MEWI, Brennan Ayre O'Neill LLP, john@b-a-o.com, Wirral - Sales pipelines remain reasonably solid but the much trailed threats of budget tax rises is having a negative impact on market sentiment / confidence.

Robert Keith Dalrymple, FRICS, Keith Dalrymple Chartered Surveyor, keith.dalrymple@outlook.com, Isle Of Man - Speculation about imminent U.K. Budget announcement appears to be generating increased interest in the Isle of Man property market.

East Midlands

Ann Rachel Gascoine, FRICS, Gascoines Chartered Surveyors, rachelgascoine@gascoines.co, Southwell Nottinghamshire - The impact of the unknown much discussed tax changes has seriously depressed the residential sales market.

Anon, MRICS, anon, louise.blackshaw@bellwatson.co.uk, Brigg - Steady supply and demand. New properties to the market selling if priced correctly. Vendors with unrealistic expectations sitting on the market. Properties being downvalued at survey.

Kirsty Keeton, MRICS, Richard Watkinson & Partners, kirsty@richardwatkinson.co.uk, Newark, Notts - Properties are selling well on the back of price reductions. Nervousness around the budget remains and many buyers and sellers are still holding off until the tax situations are firmed up.

Stephen J Gadsby, BSc FRICS, Gadsby Nichols, stevegadsby14@gmail.com, Derby - Very quiet market as it appears a number of potential sellers and buyers awaiting November Budget.

Tom Wilson, MRICS, King West Ltd, twilson@kingwest.co.uk, Stamford - Talk of the impending Budget and what might or might not be, dominates. There is activity within the market for property priced below £1mm, with more caution shown by Buyers fishing in the market above. Fewer but better "quality" viewings across the board however. Better than expected honestly.

Will Ravenhill, MRICS, Readings Property Group, wravenhill@readingspropertygroup.com, Leicester - Buyers and sellers definitely feeling jittery because of the Government's ridiculous need to "drip feed" potential areas of taxation weeks before the budget actually takes place!

West Midlands

Andrew Oulsnam, MRICS, Robert Oulsnam and Company Limited, andrew@oulsnam.net, Birmingham - The Chancellor's comments on tax and stamp duty in September have had a marked effect on the market with both SSC sales and new instructions well done for the time of year and some buyers holding back on exchange.

Cheryl La, AssocRICS, , c.la@gatewaysurveyors.co.uk, Wolverhampton & Birmingham - The looming Budget is causing havoc in the housing market.

Colin Townsend, MRICS, John Goodwin, colin@johngoodwin.co.uk, Malvern - A very subdued month for both new instructions and

sales, the first significant downturn this year. Activity has dropped as buyers and sellers wait to see what the November budget will bring. It's clear the public are delaying any decision to move until 2026.

John Shepherd, MRICS, ShepherdVine, john@shepman.co.uk, Solihull - The impending Budget is having a very negative effect on the sales and letting market.

Nick Millinchip, MRICS, Phipps & Pritchard, nmillinchip@phippsandpritchard.co.uk, Kidderminster - Feels like the tap has been turned off in the property market right now. So much uncertainty ahead of Autumn Budget on 26 November 2025 and general negative sentiment now in overdrive. People are waiting!

Richard Franklin, MRICS, Franklin Gallimore, richard@franklingallimore.co.uk, Tenbury Wells - Still good supply of properties and applicants. Press talk about a draconian budget is decidedly unhelpful - with stasis resulting.

East Anglia

David Boyden, MRICS, Boydens Ltd, david.boyden@boydens.co.uk, Colchester - October saw more willing vendors coming to the market, however buyers were a little on the light side. Buyers are still citing concerns with the pending budget as the blocker for committing. Exchanges were at record level for the year.

Kevin Burt-Gray, MRICS, Pocock + Shaw, kevin@pocock.co.uk, Cambridge - The residential sales market is slow with pre-Budget uncertainty taking its toll. We are expecting a very quiet last quarter to 2025.

Mark Wood, MRICS, Blues Property Ltd, mark@bluesproperty.com, Cambridge - Difficult market, sales achieved but prices need to be flexible. Concern over Autumn Statement is 'hanging' over activity.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Burnham, Buckinghamshire. - The market is very quiet - Christmas has come early this year.

Rob Swiney, MRICS, Jackson Stops, rob.swiney@jackson-stops.co.uk, Suffolk - The market has slowed down in recent weeks at the mid to high end, holding its breath for the Budget announcements in late November.

Zaman Sheikh, AssocRICS RICS Registered Valuer, Northwood Chelmsford, zamansheikh@northwooduk.com, Chelmsford - The sales market seems to be much quieter with many waiting for the budget in November.

South East

Anna. Catrin Williams-Jones, MRICS, Kempton Carr Croft, catrin.jones@kemptoncarr.co.uk, Maidenhead - Many of the sales properties are accidental landlords still leaving the market. Others are people who know their mortgage is going up and are moving to cheaper areas.

Christopher Clark, FRICS, Ely Langley Greig, chrisclark@elgsurveyors.co.uk, Eastleigh - The market continues to flat line with values still edging downwards. The pre-budget media speculation only fuels further uncertainty in the market.

Damian Bartram, MRICS, Bartrams, damian@bartrams.co.uk, Beaconsfield - Housing market has stalled: flat/declining prices, ~8-10% fewer transactions and longer sale times. Affordability pressures, high mortgage rates, more homes for sale and Autumn Budget tax uncertainty are influencing buyer behaviour.

Donald Leslie, BA, MRICS, Donald Leslie & Co Ltd, info@donaldleslie.co.uk, Amersham - The market is currently defined by caution and stagnation. Budget uncertainty is making buyers hesitant, and sales involving first-time buyers with parental financial help are proving difficult to complete. Properties in excellent condition and desirable locations are moving.

Edward Rook, MRICS, Knight Frank, edward.rook@knightfrank.com, Sevenoaks - All eyes on 26/11. Some trying to get transactions done by then. Others just bracing themselves for increased taxes. Is it

going to be bad or very bad.

James Farrance, MANEA, FARLA, Braxton, jfarrance@braxtons.co.uk, Maidenhead - Buyer confidence remains subdued amid economic uncertainty and misguided government policies. Prices hold firm locally due to strong fundamentals, but Labour's lack of direction risks undermining future stability.

Martin Allen, MRICS, Elgars, m.allen@elgars.uk.com, Wingham, Canterbury - Long lead in time into the budget and general economic doom and gloom denting confidence and do not expect any change until the spring.

Michael Brooker, FRICS, Michael Brooker Estate Agents, michael@michaelbrooker.co.uk, Crowborough - Tough market not helped by National Media speculation concerning forthcoming Budget. Speculation leads to lack of confidence and inactivity.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Ashford - Lower-value house sales are still being put together.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Beaconsfield - Confidence very low due to the looming budget. Interest rates are still relatively high and confidence is low, which has created a large gap between vendor expectations and purchasers' caution.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Chalfont St Giles - Currently challenging to 'bridge' the gap between sellers' and buyers' expectations. Limited new stock coming onto the market.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Chalfont St Peter, Buckinghamshire. - The market is still a buyer's market. Purchasers remain cautious.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Chesham - Good level of instructions, mainly in the low/mid value range, there has been some good interest in the price range, leading to a good level of sales.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Feltham - The market for family homes is still in strong demand, although instruction levels have now reduced.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Flackwell Heath - Purchasers are being cautious due to perceived potential increased taxes, which has led to a reduction in sales. Limited new instructions are now coming to the marketplace.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Gerrards Cross, Buckinghamshire - The release of a budget date effectively killed all sensible activity in the market. For higher priced property this is because buyers are reluctant to commit with the threat of increased costs and changes to inheritance tax.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Langley, Berkshire - The market is fragile, and this is leading to a breakdown of chains.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Slough, Berkshire - Applicants and vendors are awaiting the Autumn Budget due to leaked information relating to the housing market.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Staines - A good number of new sales, but purchasers are very cautious. Instruction levels were low in October.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsveyors.co.uk, Windsor, Berkshire - The market has been good for new sales, but the middle value for this area for this location new instructions are lower.

Murray Wills, FRICS, Page & Wells, mjdww@page-wells.co.uk, Maidstone - Speculation over the contents of the Autumn Budget

has really started to affect buyers confidence over the last few weeks. This is affecting pipeline sales as well as potential sales. The sooner we know what the Budget holds, the better.

Paul Lynch, AssocRICS, First for Auctions, part of LRG, plynch@firstforauctions.co.uk, Wokingham - We had the largest and most successful monthly auction in our history in October, appetite from buyers and sellers for the speed and certainty auctions provide is ever increasing and expected to continue as we partner with more and more estate agents.

Perry Stock, FRICS, Registered Valuer, Capitello Estates Ltd, perry@perrystock.co.uk, Nr Cobham, Surrey - A stalled market as people await the outcome of the major changes which are speculated to be coming in the forthcoming budget.

Tim Green, FRICS, Green & Co.(Oxford) Ltd, tim.green@greenand.co.uk, South Oxfordshire - For all but the rare few and first time purchases we are firmly in the pre-Autumn Statement hiatus.

Tony Jamieson, MRICS, Clarke Gammon, tony.jamieson@clarkegammon.co.uk, Guildford - Everyone seems to be waiting for the Autumn budget. Very little activity, with vendors having to bring asking prices down to attract interest but not necessarily finding a proceedable buyer. As Christmas is coming, I suspect that it will be 2026 before the market improves.

Trevor Brown, FRICS, Trevor Brown Surveyors Ltd, tbrownsurveyors@btinternet.com, Southend-On-Sea - Sales taking forever to complete, supply and demand down, prices lower than peak, realistic pricing essential, nervousness about forthcoming budget, landlords continue to leave the sector.

South West

Chris Pearson, AssocRICS, Baker Pearson, chris@bakerpearson.com, Dorchester - More activity in the First time buyer market. Most the interest and sales in the £175,000 to £250,000 price brackets.

Clive Pearce, AssocRICS, Clive Pearce Property, clive@clivepearceproperty.com, Truro - The continued uncertainty in the country around the budget, proposed changes to income tax, inheritance tax etc all stalls the market.

David Hickman, BSc FRICS, , onetrip100@outlook.com, South Devon - With clocks about to change, Christmas coming and budget taxes, the housing market is increasing sluggish as sentiment among buyers is increasingly cautious - values are steadily falling as buyers take anything to move on.

David J Robinson, AssocRICS, DJR Estate Agents & Auctioneers Ltd, david@djrestateagents.co.uk, Cornwall West Devon & Torridge - The market has ground to a halt waiting the Autumn Budget and what measures will be announced and as importantly when they will be implemented. However, pent up demand is building, top end market very nervous.

Graham Thorne, FRICS, Thornes, graham@thornes.org.uk, Poole/ East Dorset - The market is very depressed not helped by unhelpful budget speculation.

Howard Davis, MRICS, 4134758, howard@howard-homes.co.uk, Bristol - The whole process takes far too long. When I began in estate agency in the late 1980's, the average time from agreed sale to completion was no more than 3 months. The law society are in no rush to change the system as they get paid even if a sale doesn't complete.

Ian Perry, FRICS, Perry Bishop, ianperry@perrybishop.co.uk, Cheltenham Cirencester Faringdon Nailsworth Stroud Tetbury - Uncertainty caused by government pronouncements has slowed the market.

James Wilson, MRICS, Jackson-Stops, james.wilson@jackson-stops.co.uk, Shaftesbury - The market is quiet ahead of the November budget.

Jeff Cole, MRICS, Cole Rayment & White, jeff.cole@crw.co.uk,

Wadebridge - The market is still tough & very price sensitive. The fears over the budget & so much uncertainty has definitely affected our Autumn market for both vendors & purchasers.

John Corben, FRICS, FCABE, Corbens, john@corbens.co.uk, Swanage - The market remains slow. Many would be buyers are waiting for the result of the Autumn statement before committing.

John Doody, FRICS, John S Doody FRICS, johndoody@msn.com, Gloucestershire - Market recovery will take more confidence in our futures.

John Woolley, FRICS, john woolley ltd, john@johnwoolleyltd.co.uk, Salisbury - The market remains very flat - and individual.

Julian Bunkall, FRICS, Jackson-Stops, julian.bunkall@jackson-stops.co.uk, Dorset - The market generally remains static and until the Budget reveals its effect on the property market this will remain until the end of the month.

Peter Walker, MRICS, Richard Harding, peter@richardharding.co.uk, Bristol - The market is cautiously poised, pending the budget and the subsequent impact on stamp duty, capital gains and other taxation. People fear the unknown so whatever the outcome we expect an uptick in new instructions and activity, once everyone has computed the impact on their financial outlook.

Richard Charles Addington, MRICS, Jackson-Stops, richard.addington@jackson-stops.co.uk, Exeter - Waiting for the budget seems to be a common theme.

Robert Cooney, FRICS, Robert Cooney Chartered Surveyors & Estate Agents, robert.cooney@robertcooney.co.uk, Taunton - Fewer viewers in the market than previously but could be half-term effect linked with a degree of caution about the budget. Still agreeing good levels of sales but price is very much key - sensible sellers are picking up the buyers!

Roger Punch, FRICS, Marchand Petit, roger.punch@marchandpetit.co.uk, South Devon - Buyers remain available for competitively priced properties, but caution prevails. It remains, and looks to remain, a buyer's market for the foreseeable future.

Simon Lord, AssocRICS, Lords Survey and Valuation, simon@lordssurveyandvaluation.com, Bath And Bristol - The gradual growth in seller awareness that it is a buyers market has produced more competitive and attractive guide pricing and this has kept sale transactions moving. Post budget, the January market will (more than usual in my view) set the tone for 2026.

Simon Milledge, MRICS, Jackson-Stops, simon.milledge@jackson-stops.co.uk, Blandford Forum - Market slowed consistently over the last 2 or 3 months in the lead up to budget, and probably going to stay that way until well after the budget and in the lead up to Christmas and the New Year.

Wales

Anthony Filice, FRICS, Kelvin Francis Ltd., tony@kelvinfrancis.com, Cardiff - Still a steady flow of new instructions to sell. Reasonable confidence amongst Buyers at prices up to £800,000 but nervousness above due to the uncertainty of the impending budget. The market over £1,000,000 is sluggish.

David James, FRICS, James Dean, david@jamesdean.co.uk, Brecon - Number of sales still good although much harder work.

London

Alec Harragin, MRICS, Savills Plc, aharragin@savills.com, London - Until we have further clarity on any residential property tax initiatives in Rachel Reeves' Budget, we expect a continuation of current trends, as both buyers and sellers remain cautious and few transactions complete.

Alex Howard Baker, MRICS, Savills, ahowardbaker@savills.com, Putney - A tough market, but it is workable. Pricing is crucial though.

Christopher Ames, MRICS, Ames Belgravia, ca@amesbelgravia.

co.uk, Belgravia/London - There is still general holding back from purchasers until after the Nov Budget. Some are offering low on properties yet still delaying on an exchange of contracts (especially if not in a chain until budget). Sales with motivated buyers can be quick as solicitors have lower workload at present.

George, MRICS, Cluttons, george.barker@cluttons.com, - There is a lot of speculation due to the budget in November. The market remains very price sensitive.

James Perris, MRICS, De Villiers, james.perris@devilliers-surveyors.co.uk, London - Very subdued market as buyers wait for the budget. If the government hits property again with more taxes then the market may decline further.

Jeremy Leaf, FRICS, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk, Finchley - Over the past month, lower-than-expected inflation and downward-heading interest rates are outweighing worries about inevitable Budget tax increases. There may be fewer buyers & sellers but still sufficient numbers are negotiating hard & seem determined to move.

Len Stassi, BSc(Hons) MRICS, Delancies Ltd, lenstassi@delancies.com, London - Ongoing uncertainty and forthcoming Autumn Budget this month is currently suppressing activity and leading to an erratic market with fears of Dennis Healey/1970s type tax rises.

Mac Lal, MRICS, Shaiyla Estates Ltd, maclal66@gmail.com, London - Worries over coming budget and uncertainty of UK as an investment destination.

Robert Green, MRICS, John D Wood & Co., rgreen@johndwood.co.uk, Chelsea - With the looming budget and constant speculation around its contents, many buyers are waiting for certainty. Previously agreed sales have gone through to exchange reliably, so we do not detect a significant change in sentiment. Underlying demand appears to be strong, and vendors are realistic.

Roshan Sivapalan, MRICS, Blakes Chartered Surveyors & extension. lease, roshan@blakessurveyors.com, London - Ongoing uncertainty over future property taxation and wider economic jitters are tempering buyer confidence, while a rise in landlord disposals is adding supply-side pressure, keeping flat values broadly subdued across many markets.

Rupert Merrison, MRICS, Dexters, rupertmerrison@dexters.co.uk, - There is strong demand right now, fuelled by attractive mortgage rates mortgage rates and buyers are jumping in where they see good value, good location or a combination of the two. We expect this to continue for the rest of the year and into 2026.

Simon Scott, MRICS, Places for People, simonscott1000@gmail.com, London - Buyers are not committing to purchasing a home before the budget announcement.

William Delaney, AssocRICS, Coopers of London Limited, william@coopersonlondon.co.uk, Central London - The sales market seems to have entered an early pre-Christmas torpor. Speculation concerning the contents of the impending budget has compounded a sense of economic and political malaise, causing transaction levels to decline markedly.

Scotland

Alan Kennedy, MRICS, Shepherd Chartered Surveyors, alankennedy@shepherd.co.uk, Fraserburgh - We're now in a period of typical seasonal downturn though recent market activity would suggest there is still demand for good, well presented properties. Closing dates, which seemed to be a thing of the past, have been occurring on occasions in the past few weeks.

Craig Henderson, MRICS, Graham & Sibbald Property Consultants Limited, craig.henderson@g-s.co.uk, Ayrshire - The market has remained similar pretty much as it has all year. Demand has continued to outstrip supply, buyers are a little cautious, but most are happy to pay a fair price in most areas. Prices have continued to rise gently through the year for most houses, but less so for flats.

David Cruickshank, MRICS, D M Hall LLP, David.Cruickshank@dmhall.co.uk, Elgin - The Morayshire market remains buoyant with good properties continuing to sell readily. Demand remains strongest in the Elgin/Lossiemouth area and is weakest in less desirable locations. There is now a fair supply of houses relative to demand, with the market now closer to a balanced position.

Greg Davidson, MRICS, Graham + Sibbald, gdauidson@g-s.co.uk, Perth - The market is stable and performing reasonably well but continued political and budget uncertainty is making it difficult for people to plan and this is causing hesitancy. So market activity may be subdued in the short term before it normalises again in 2026.

Ian Morton, MRICS, Bradburne & Co, ian@bradburne.co.uk, St Andrews - The market has stagnated ahead of the budget and the majority of sellers are waiting until into 2026 to sell. Confidence levels have dropped due to uncertainty over possible tax rises.

Lisa A Pitchers, MRICS, Rettie & Co, lisa.pitchers@rettie.co.uk, Glasgow City - The pending budget, as in previous years, has slowed the pace of sales as people wait to see the outcome and are scared by the press speculation.

Marion Currie, AssocRICS, RICS Registered Valuer, Galbraith, marion.currie@galbraithgroup.com, Dumfries & Galloway - Continued subdued activity due to a combination of school October holidays and pre-Budget nerves. Market appraisals looking towards spring launches, which is common at this time of year.

Thomas Baird, MRICS, Select Surveyors Ltd, info@selectsurveyors.co.uk, Glasgow - Slow start to survey instructions compared to last year after October break. Interest rate held at 4% may help stimulate buyers as we approach the end of year slow down.

Northern Ireland

Kirby O'Connor, AssocRICS, GOC Estate Agents, kirby@gocestateagents.com, Belfast - We have found recently that the upper end of the market had slowed slightly, but there are pockets of bidding on the larger period homes in South Belfast. Our new builds are continuing to be popular and investors alike.

Samuel Dickey, MRICS, Simon Brien, sdickey@simonbrien.com, Belfast - The market for resale and new homes is still performing well. Demand is strong and prices are rising.

Surveyor comments - lettings

North

John Gibson, MRICS, North East Estate Agents, jgibson@north-east-ea.co.uk, Middlesbrough - The rentals properties which are available has diminished in the past 12 months, landlords are selling up due to their being no incentives to rent and increased taxes. New landlords are being put off by the stamp duty increase, 5% is too much in certain parts of the country and should be reviewed.

Keith Pattinson, FRICS, keith pattinson, keith.pattinson@pattinson.co.uk, National - No-one can predict future, as external factors disrupt. There is a shortage of properties, getting worse by landlords selling. Many conflicts like HMOs, electric, CP12's, owner occupied houses can be over-crowded.

Neil Foster, MRICS, Walhouse Surveyors & Valuers, neil@walhouse.co.uk, Hexham & Newcastle Upon Tyne - Rental growth appears to have slowed but the supply of available homes has not improved notably. Any tax grab targeting landlords in the forthcoming budget will reignite rent inflation at a time when tenants will likely be feeling their disposable income squeezed elsewhere.

Rodrica Straker, MRICS, Leazes Estate Office, rodrica@leazesestate.co.uk, Hexham - Larger properties sticking, affordability issues & concerns re upcoming budget & stamp duty debate. Smaller properties flowing as normal.

Shaun Brannen, AssocRICS, Brannen & Partners, shaun.brannen@brannen-partners.co.uk, Whitley Bay & Coastal - Supply has actually increased on the same period as last year, but is still nowhere near the levels to satisfy the demand.

Yorkshire & the Humber

Alex Mcneil, MRICS, Bramleys, alex.mcneil@bramleys.com, Huddersfield - Getting ready for the big bang that is the Renters Rights Bill. Well, it might not all be such a bad thing and the sooner it comes in the better and we can get on with rebuilding the managed stock levels.

Ben Hudson, MRICS, Hudson Moody, benhudson@hudson-moody.com, York - Slower rental market as landlords await the renters reform bill gaining Royal Assent.

James Horner, MRICS, McCabe, MRICS, David G Horner Ltd, james@davidghorner.co.uk, Wakefield - There is still a limited number of good quality rental properties.

North West

Jonathan Clayton, FRICS, JPA, jonathan@jpasurveyors.co.uk, Lytham St Annes - Still buoyant but uncertain economic conditions.

East Midlands

Ann Rachel Gascoine, FRICS, Gascoines Chartered Surveyors, rachel-gascoine@gascoines.co, Southwell Nottinghamshire - The impact of the forthcoming budget and the renters right act has seriously depressed the residential rental market.

Anon, MRICS, anon, louise.blackshaw@bellwatson.co.uk, Brigg - Plenty of tenants, the problem is finding those with a good history to let to. Rents still very high for the area.

John Chappell, BSc.(Hons), MRICS, Chappell & Co Surveyors Ltd, john@chappellandcosurveyors.co.uk, Skegness - Quality tenants that meet Landlords requirements in short supply at the moment, accepting that those requirements may have to be revised when the "Renters Act" becomes law. Landlords still leaving the market.

Will Ravenhill, MRICS, Readings Property Group, wravenhill@reading-propertygroup.com, Leicester - Landlords similarly jittery regarding the upcoming budget and, of course, the Renter's Rights Act which is

having a negative impact months before it's actually enforced!

West Midlands

Andrew Oulsnam, MRICS, Robert Oulsnam and Company Limited, andrew@oulznam.net, Birmingham - The lettings market is in a state of flux with the new legislation finally passed but with so much uncertainty, both new instructions and lets are well down.

Colin Townsend, MRICS, John Goodwin, colin@johngoodwin.co.uk, Malvern - A quiet month. Landlords are clearly very unnerved by the fact that the Rents Rights Legislation has now come into force. Early signs indicate that many may be considering either selling or reducing their rental portfolios over the coming years.

Richard Franklin, MRICS, Franklin Gallimore, richard@franklingallimore.co.uk, Tenbury Wells - There is still a shrinking pool of rentals with BTL landlords leaving the sector. Hopefully now enacted the legislation will bed down and a new reality develop based on actuality not scare-mongering!

East Anglia

David Boyden, MRICS, Boydens Ltd, david.boyden@boydens.co.uk, Colchester - Instructions were a little lower than the previous month, however tenant demand saw an increase. Rents have stabilised for now. From a landlord perspective, there is considerable concern regarding the renters' rights act and the impact it will have.

Kevin Burt-Gray, MRICS, Pocock + Shaw, kevin@pocock.co.uk, Cambridge - Rental market has softened from its peak with more property available than normally expected and asking prices being reduced to reflect this dynamic.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Burnham, Buckinghamshire - Limited level of family properties to let which is still in good demand.

Nigel Morgan, FRICS, Managed Property Supply Ltd, nigeldmorgan13@gmail.com, North Walsham - Real uncertainty about the impact of the Renter's Act. Landlords will inevitably wish to reflect the added risks to which it exposes them in rents; and the impact will be greater if significant numbers of landlords withdraw from the market.

Zaman Sheikh, AssocRICS RICS Registered Valuer, Northwood Chelmsford, zamansheikh@northwooduk.com, Chelmsford - There is still strong demand for rental properties with steady growth in rents achieved. It will be interesting to note how landlords will act following the implementation of the RRB. There is fear that with possible introduction of further tax on landlords, these costs will be simply passed on.

South East

Anna. Catrin Williams-Jones, MRICS, Kempton Carr Croft, catrin.jones@kemptoncarr.co.uk, Maidenhead - The Government does not seem to understand (or care) that by penalising landlords, there will be less rental stock. They obviously want corporate landlords who can pay lobbyists to allow them exemptions. Unfortunately, it means private landlords leave the sector, causing supply issues.

Damian Bartram, MRICS, Bartrams, damian@bartrams.co.uk, Beaconsfield - Increased mortgage rates will amplify landlord risk-aversion, fueling rent hikes to cover higher borrowing costs alongside Renters' Rights Act changes. less-profitable landlords may sell properties, further tightening rental supply. MTD pushes higher-income owners toward company structures.

James Farrance, MANEA, FARLA, Braxton, jfarrance@braxtons.co.uk, Maidenhead - Tenants are rejecting large build-to-rent schemes due to poor treatment by investment funds. Many now prefer small landlords who offer genuine care, connection, and security. Demand remains strong despite economic mismanagement and anti-landlord policies.

Martin Allen, MRICS, Elgars, m.allen@elgars.uk.com, Wingham, Canterbury - Very little coming onto the market and we now have a

waiting list for properties that will be relet following refurbishment putting more upward pressure on rent levels.

Michael Brooker, FRICS, Michael Brooker Estate Agents, michael@michaelbrooker.co.uk, Crowborough - Active less supply. Concerns in respect of Renters Bill

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Ashford - The lettings market is active dependent on the number of quality instructions available.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Beaconsfield, Buckinghamshire. - October has been another month of price reductions and fewer tenants registering with most activity in the lower end of the rent scale, and properties are still taking longer to rent.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsurveyors.co.uk, Chalfont St Giles - Limited stock reflects the number of letting opportunities.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Chalfont St Peter, Buckinghamshire. - It is taking longer to Let properties, as tenants are increasingly price sensitive.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsurveyors.co.uk, Feltham - Good, steady marketplace close Heathrow, although rental level increases are now less.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Flackwell Heath - Good level of activity in renting small cottages, but now there is a lack of supply.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Gerrards Cross, Buckinghamshire - The lettings market is very steady, but many landlords are selling their investments and looking to invest in other forms of investments due to Government policy.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Langley, Berkshire - More instructions required. Generally a good market.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frostsurveyors.co.uk, Slough - More instructions required, generally a good market.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Staines - Stock has increased due to developers not being able to sell new properties at the anticipated levels to make a profit, and good demand for new properties to let.

Mr John Frost, MRICS, The Frost Partnership, jf.beaconsfield@frost-surveyors.co.uk, Windsor, Berkshire - The rental values are moving downward and will continue. Letting instructions are scarce and tenant demand has reduced.

South West

David Hickman, BSc FRICS, , onetrip100@outlook.com, South Devon - Rent is a large part of tenants budget as landlords either increase rents to cover additional costs or they exit the rental market due to legislation changes.

Howard Davis, MRICS, 4134758, howard@howard-homes.co.uk, Bristol - We are seeing an increased number of private landlords calling it a day and as a result there are less properties which are keeping rents high. Supply & demand!

John Woolley, FRICS, john woolley ltd, john@johnwoolleyltd.co.uk, Salisbury - Any change in legislation may depress rents as it affects confidence of both parties.

Wales

Anthony Filice, FRICS, Kelvin Francis Ltd., tony@kelvinfrancis.com, Cardiff - Demand is still strong at the lower priced end of the market, but activity slowing in the upper rental end of the market.

David James, FRICS, James Dean, david@jamesdean.co.uk, Brecon -

Still a shortage of rentals.

London

Alec Harragin, MRICS, Savills Plc, aharragin@savills.com, London - There is a general move away from low scale and accidental landlords to more professional property holding companies and institutional investors who both benefit from economies of scale and a less punitive tax setup.

Jonathan Price, AssocRICS, , jonathan.c.price@gmail.com, Bromley - Rents appear to have reached a peak of affordability, but we expect them to continue to rise in line with inflation due to a continued lack of supply.

Jeremy Leaf, FRICS, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk, Finchley - Ongoing concerns about the cost of living and aspiring first-time buyers taking advantage of more relaxed lending criteria have combined to reduce demand & soften rents particularly of 1 & 2 bed flats. Supply is also down partly due to landlord sales-often prompted by the new Renters Rights Act.

Kristjan Byfield, , base property specialists, kristjan@baseps.co.uk, London - Affordability remains the greatest impact to market growth both in terms of rents and capital appreciation. It will be interesting to see what impact the apparent consolidation of letting agents has on the market however expect the overall market to be stable but will stunted rental growth of 2-3%.

Mac Lal, MRICS, Shaiyla Estates Ltd, maclal66@gmail.com, London - Due to properties not shifting, owners have no choice but to continue letting.

Marcus Perry, FRICS, Retired, marcusjcperry@gmail.com, Pimlico, London Sw1 - New Renters Rights Act will have some effect on rents - and availability of property to rent.

Mark Wilson, MRICS, Globe Apartments, mark@globeapt.com, London - October bucked the seasonal trend, with rising demand for high end rentals as landlords reclaimed homes ahead of the Renters' Rights Act 1925. To boot Landlords show compliance fatigue, with new schemes like Westminster licensing deepening regulatory burnout.

Marta Hugon, MRICS, Carter Jonas LLP, marta.hugon@carterjonas.co.uk, London - Really tricky period of time at the moment. Nobody is moving in, nobody is selling. Same rents from 2022 cannot be achieved now.

Mr Paul Dolan, AssocRICS, Dolan Pratley Associates, pauljohn-dolan@gmail.com, London - The renters reform act although in operation has still not stopped the rental bidding wars, caused by a lack of rental stock thanks to the same act.

Rupert Merrison, MRICS, Dexters, rupertmerrison@dexters.co.uk, - The lettings market has been busy all year and we continue to be inundated with good quality tenants keen to find.

Will Barnes Yallowley, AssocRICS, Tate Residential, will@tateresidential.co.uk, Kensington - The RRB will not reduce rents but Sec 13 will slow rent increases giving false hopes to tenants, who have been let down by successive governments.

William Delaney, AssocRICS, Coopers of London Limited, william@coopersonlondon.co.uk, Central London - Rentals values have been maintained, but as predicted, falling levels of available stock are becoming a real issue. The likelihood of more anti-landlord measures in the budget and the effects of the ill-conceived "Renters' Rights" legislation will further damage the PRS.

Scotland

Carolyn Davies, MRICS, Savills, cmadavies@savills.com, Dumfries - Continued demand for all types of property especially 2-3 bed, but notice that we are reaching a ceiling for rent at the higher end of the market and tenants unwilling to go over £1000 per month.

Craig Henderson, MRICS, Graham & Sibbald Property Consultants Limited, craig.henderson@g-s.co.uk, Ayrshire - Demand continues

to outstrip supply and rents are continuing to rise. This is likely to continue for the foreseeable future.

Ian Morton, MRICS, Bradburne & Co, ian@bradburne.co.uk, St Andrews - Investors in buy to let properties are not buying and short term holiday let owners are seeing a reduction in profit due to rising overheads. There are more properties available for rent than the same time last year.

Paul Letley, FRICS, Pavillion, Paul@pavillion.net, Dundee - Fewer foreign students has resulted in an oversupply of flats, particularly HMO where there is no alternative tenant type.

Northern Ireland

Kirby O'Connor, AssocRICS, GOC Estate Agents, kirby@gocestate-agents.com, Belfast - Rentals are strong and holding prices .Still an imbalance of demand versus stock.

Samuel Dickey, MRICS, Simon Brien, sdickey@simonbrien.com, Belfast - The rental demand is constant and rents are rising.

Contacts

Subscriptions

Access to the data is available via a paid subscription. This will include the full historical back set, regional breakdown, and, where applicable, the seasonally and not seasonally adjusted data.

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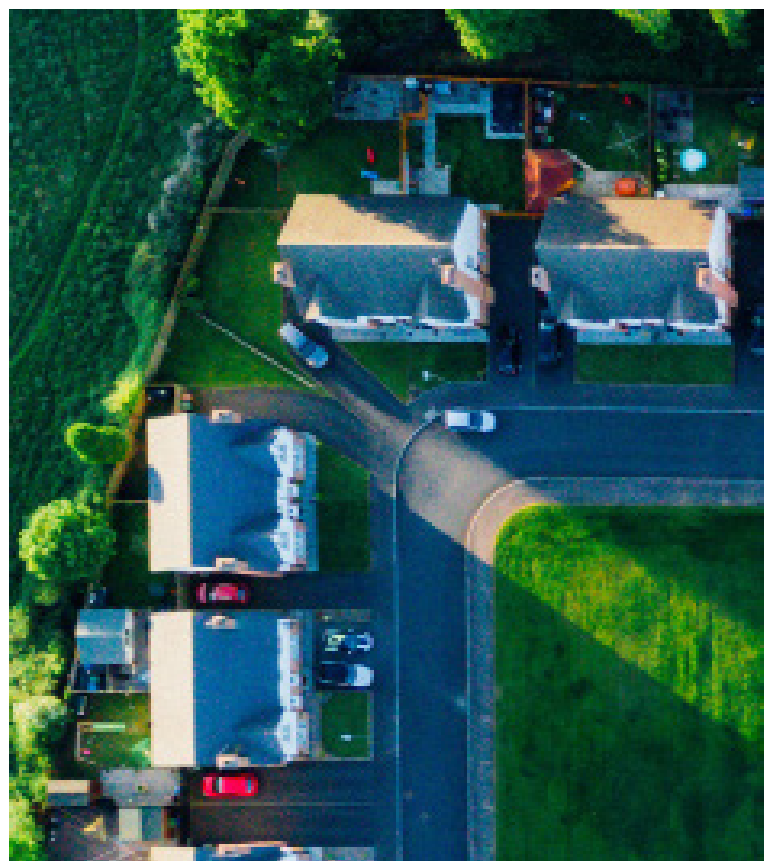
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*All packages include the full historical back set, regional breakdown, and, where applicable, the seasonally and not seasonally adjusted data.



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