



Q4 2018: UK Commercial Property Market Survey

Structural change and politics remain heavy influences

- Tenant demand for retail space still falling sharply, contrasting with growth in the industrial sector
- Industrial the only sector displaying positive rental and capital value expectations in the near term
- Proportion of respondents sensing the overall market is in some stage of a downturn increases

The Q4 2018 RICS UK Commercial Property Market Survey results continue to display mixed fortunes across the three traditional sectors. Indeed, the strong performance of the industrial sector remains in stark contrast to that of retail, driven by the structural shift in consumer spending habits. Meanwhile, survey participants continue to highlight political uncertainty to be holding back activity, with the lack of clarity causing decisions to be delayed.

During the final three months of 2018, all-sector occupier demand reportedly declined for the third consecutive quarter, as the net balance inched down to -13% from -9% previously. Although the negative headline reading continues to be weighed down significantly by the sharp fall in tenant demand across the retail sector (net balance -58%), the latest results also point to a slight decline in demand for office space (net balance -9%). At the same time, demand continued to rise smartly across the industrial sector, with a net balance of +21% of respondents noting an increase over the period.

Given this sustained growth, availability of industrial space fell once more, with the survey's indicator on vacant supply continuing to edge lower for a twenty sixth successive quarter. Alongside this, having remained broadly stable over the past two years, availability picked-up in the office sector (albeit marginally). Nevertheless, it is within the retail sector where the increase in vacant space is most acute, evidenced by a net balance of 46% of respondents reporting a rise in Q4 (the joint highest since 2009). Meanwhile, retail and office landlords opted to increase incentives on offer to tenants, while those across the industrials sector kept inducements unchanged.

Respondents trimmed their expectations for headline rental growth in the near term, as the net balance eased to -7% compared to -2% in Q3. Even so, the underlying pattern remains closely aligned with that seen over the past two quarters. Rents are anticipated to continue rising in the industrial sector, while remaining unchanged for offices. The negativity is concentrated in the retail sector, where rental levels are expected to decline further.

Over the next twelve months, rental expectations remain comfortably positive across both the prime and secondary industrial markets, and are firmly negative across the board for retail (net balance -52% for prime and secondary combined). Interestingly, data from a Rightmove consumer facing survey shows that potential occupiers themselves do not envisage retail rents changing much over the same time frame, with the expectations net balance coming in at just -1%. Turning back to the RICS results, prime office rents are still anticipated to rise in the year ahead, although expectations have now turned marginally negative for secondary offices.

Looking at the broad regional breakdown reveals the national picture is mirrored to a large extent in most parts of the country. Indeed, the twelve month rental outlook is positive for the industrial sector right across the UK, while expectations remain steeped in negative territory for retail. Perhaps one distinction that can be made is in London, where prime office rental projections are flatter (albeit still slightly positive) than is the case for most regions.

In terms of the investment market, enquiries reportedly fell across the retail sector at the sharpest quarterly pace (net balance terms) since 2008. Meanwhile, industrial assets continued to attract a rise in investor interest, although the pace of growth was more moderate than that seen over the past year. Having increased fractionally in Q3, demand held more or less steady for the office sector this time around. With regards to demand from overseas buyers, there was not much change reported in any of the three sectors covered by the report during Q4.

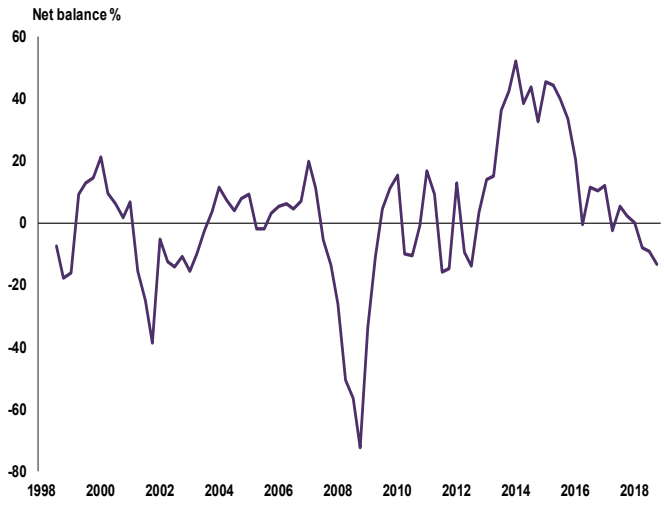
The supply of property on the market for sale was steady at the headline level. This represents the first occasion since the series was introduced in 2014 in which a decline has not been noted. The rise in retail properties for sale was offset by a decline in industrial stock, while little change was seen across the office sector. Twelve month capital value projections were broadly unaltered across most sub-sectors compared with Q3, although expectations for growth in the industrial sector were trimmed slightly. Nevertheless, prime industrial assets are still envisaged posting the strongest gains on a sectoral comparison by a comfortable margin.

From a regional standpoint, prime office capital value expectations actually improved in London (flat previously), although secondary office values are still seen coming under some downward pressure. It is also worth noting that some of the optimism around the outlook for secondary industrial values has faded over recent quarters in both London and the South East, albeit projections remain modestly positive nonetheless. Unsurprisingly, retail sector capital values, both for prime and secondary locations, are expected to fall further in all parts of the UK.

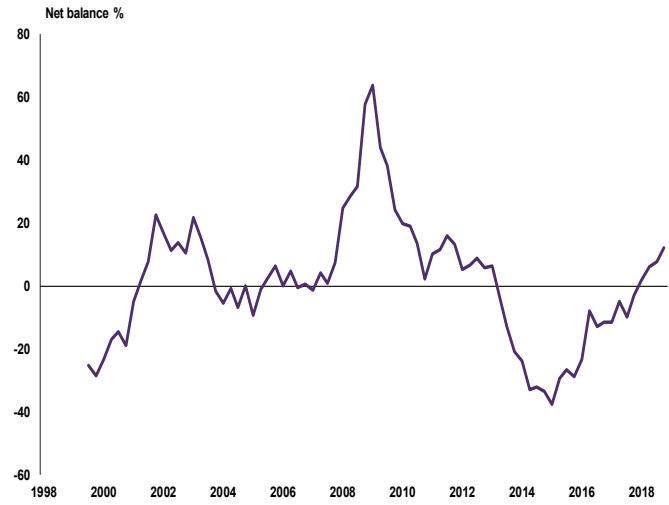
Sticking with London and the South East, a respective 71% and 69% of contributors sense the market is in the early to middle stages of a downturn. In the case of the latter, this is up from 53% in Q3, although London displayed a similarly high proportion of respondents taking this view six months ago. Nevertheless, nationally (even with both London and the South East excluded) a still significant 41% of contributors are of the opinion the market is turning down.

Commercial property - all sectors

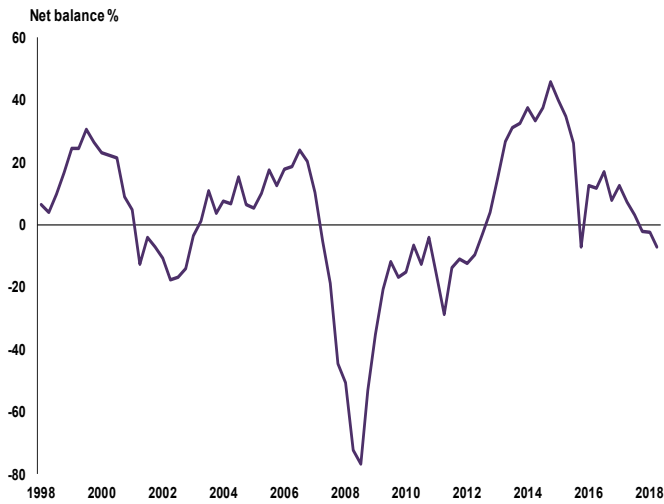
Occupier Demand



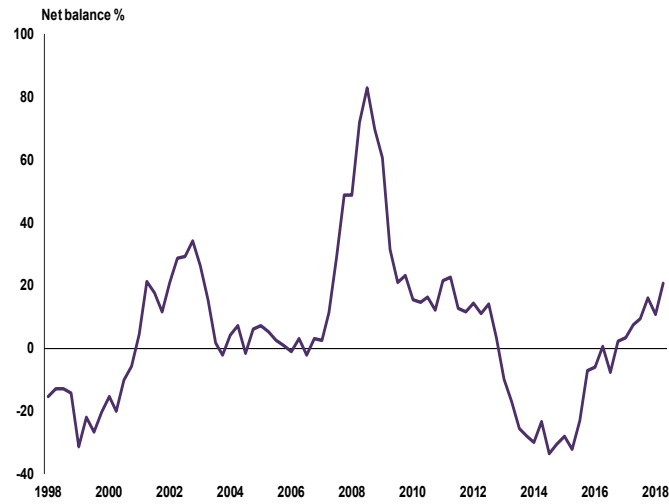
Availability



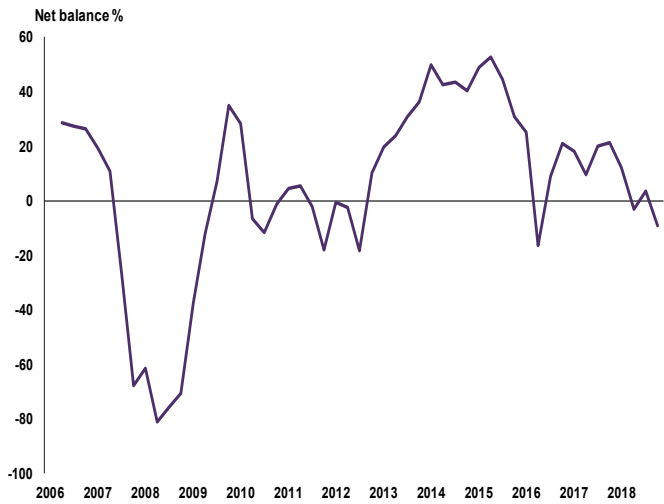
Rent Expectations



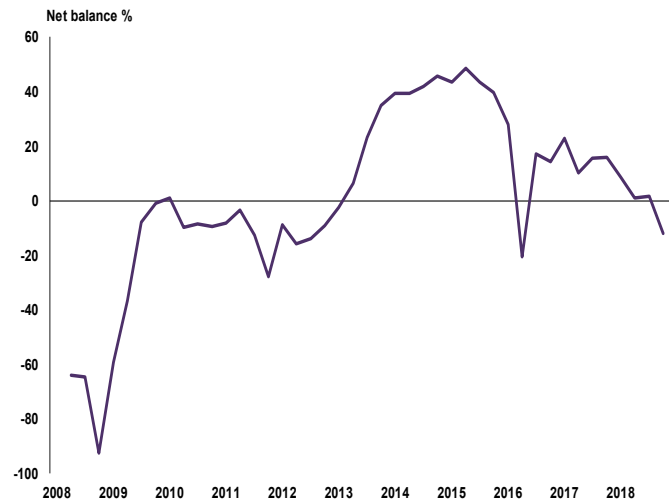
Inducements



Investment Enquiries

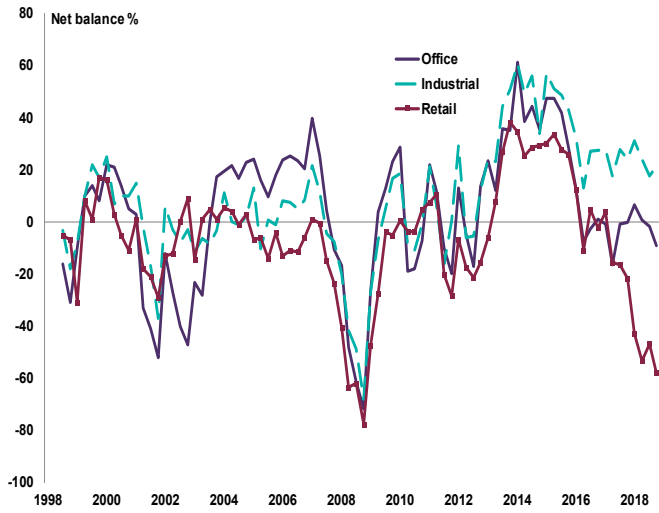


Capital Value Expectations

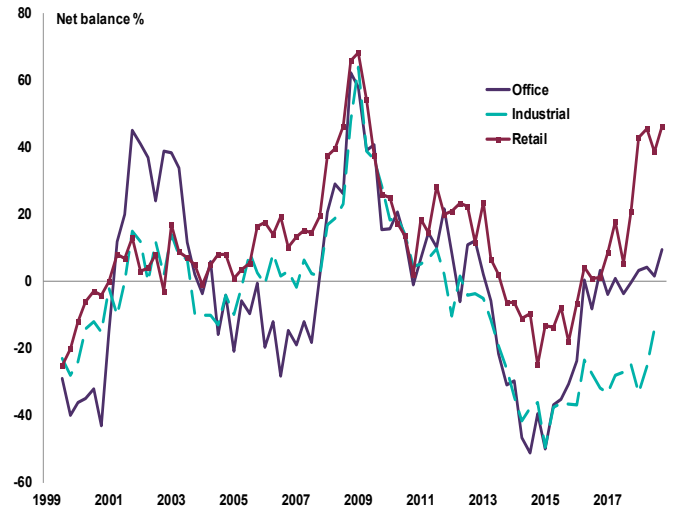


Commercial property - Sector Breakdown

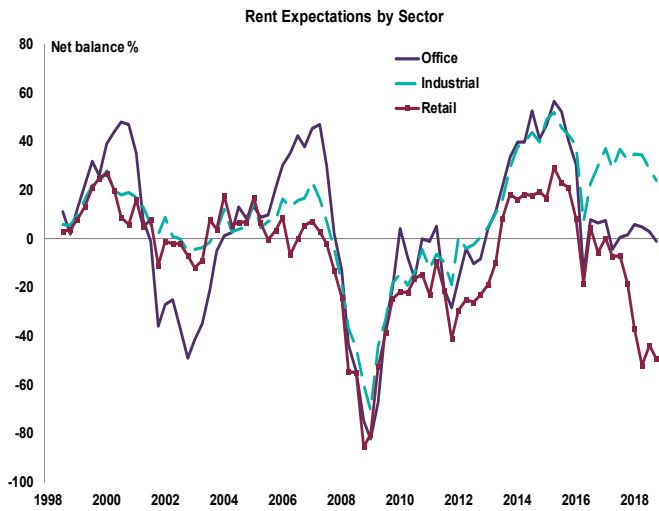
Occupier Demand



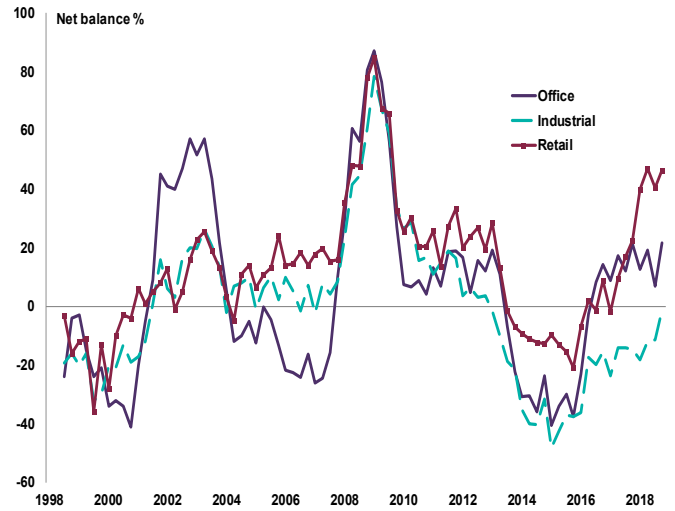
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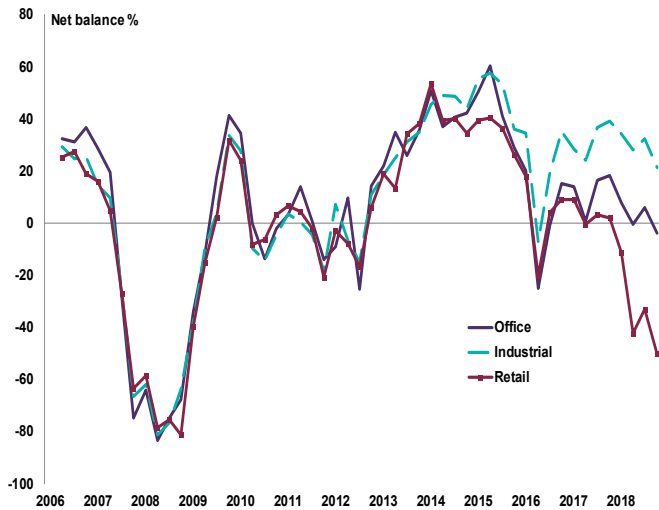
Rent Expectations



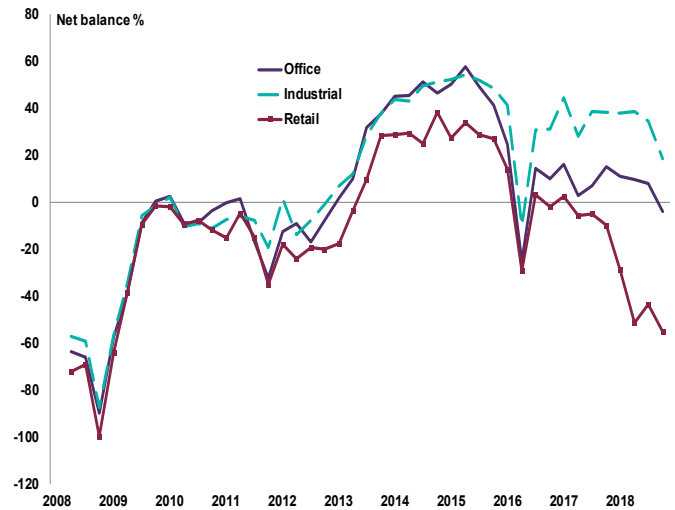
Inducements



Investment Enquiries

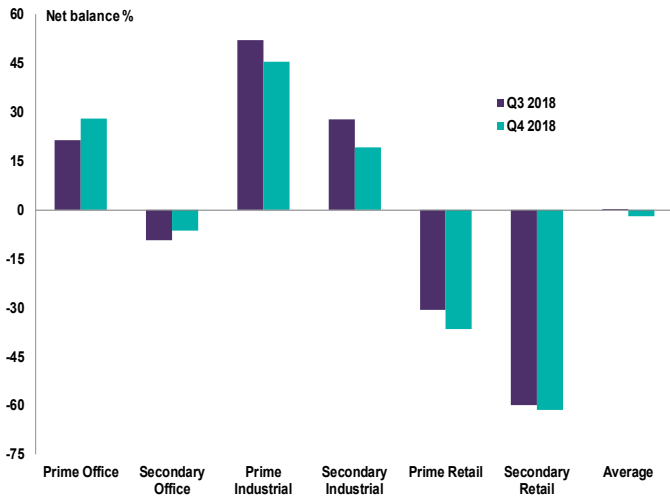


Capital Value Expectations

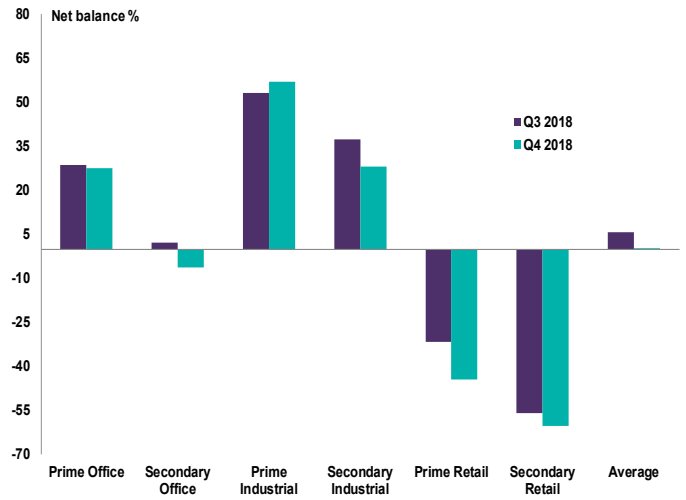


Commercial property - Additional Charts

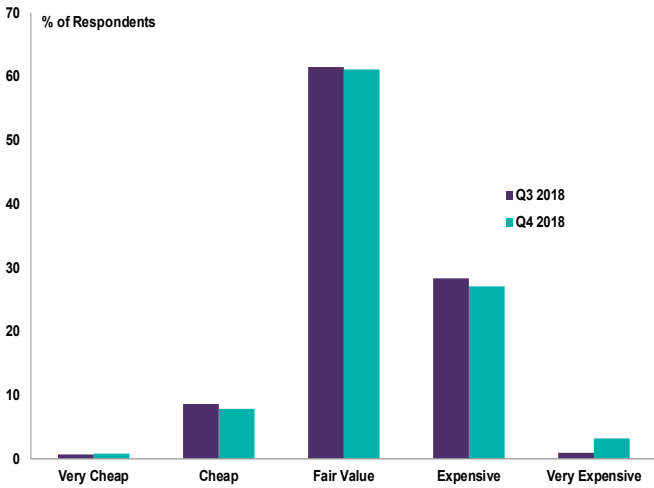
12 Month Capital Value Expectations



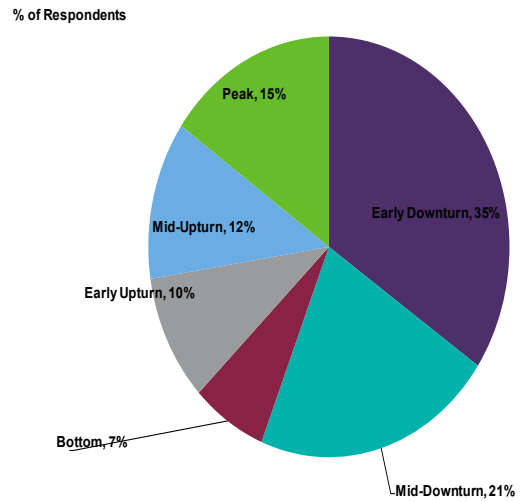
12 Month Rent Expectations



Market Valuations

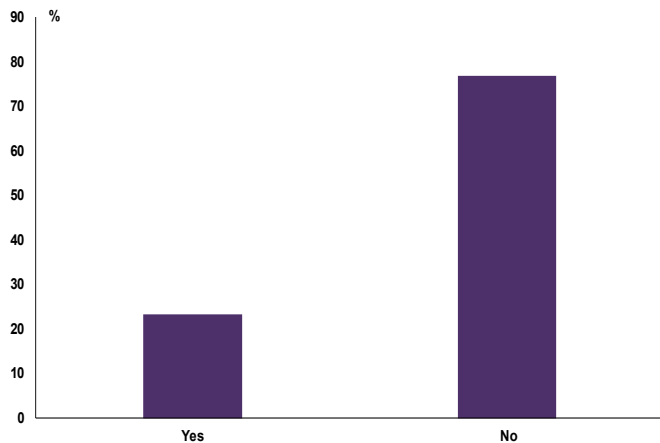


Property Cycle



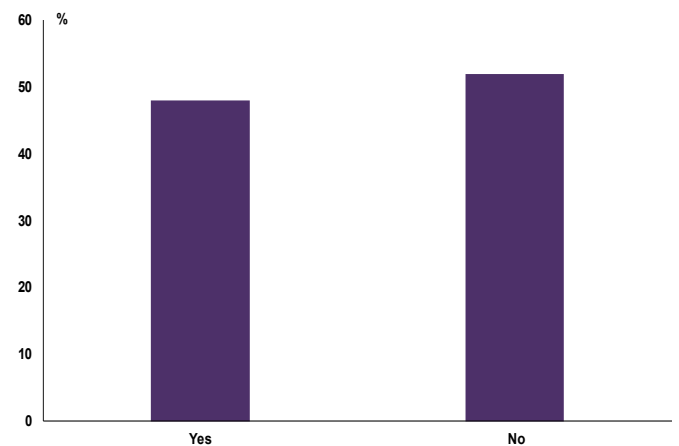
Extra Question 1

Have you seen any evidence of firms looking to relocate away from the UK in response to the Brexit vote?



Extra Question 2

Do you expect to see firms relocating away from the UK over the next 2 years?



Chartered Surveyor market comments

East Midlands

Ben Coleman BSc FRICS, Northampton, Ben Coleman Associates, ben@bencolemanassociates.co.uk - Brexit.

Brendan Bruder BSc MRICS, Northampton, Abbey Ross Chartered Surveyors, brendan.bruder@virgin.net - Northampton closed 2018 with very much a contrasting story between Northampton town centre and Northampton borough/rural. The town continued to be challenging, although healthy enquiry levels for A3 cafes and restaurants, smaller retail and any available freehold investments or buildings for occupation/development. Northampton's business parks are seeing a lower but stable enquiry and transaction profile with logistics space particularly active and office activity founded on an absence of supply.

Brendan Bruder BSc MRICS, Daventry, Abbey Ross Chartered Surveyors, brendan.bruder@virgin.net - Daventry may well benefit from the western unitary authority reorganisation. This will group Daventry and Towcester with the county town and that should help with strong interest in logistics space, low stock levels for offices and, in the medium to longer term, even in the retail and leisure sectors. Completion of the Flore bypass will help with traffic flows, making Daventry more accessible. Central freeholds for conversion, industrial and logistics space remain popular.

Brendan Bruder BSc MRICS, Kettering, Abbey Ross Chartered Surveyors, brendan.bruder@virgin.net - Work has finally started at Cransley Park adjacent to the A43/A14 junction. Speculative development is concentrating on logistics, whilst central Kettering commercial space remains a challenging market. Footfall has deteriorated in the town centre after the closure of M&S. The likely dissolution of Kettering Council and subsuming the local authority with a unitary (Corby, Wellingborough, Rushden and Thrapston) is a real change for Kettering.

Gilbert Harvey, Kettering, Budworth Hardcastle, gharvey@budworthhardcastle.com - The level of logistics activity by occupiers, and investment transactions within this sector in particular, have been extremely high over the last 12 months within the East Midlands.

Haydn Cole, Dunstable, Charmasson Management Consultants, harry.cole@charmassonconsulting.co.uk - There is increasing uncertainty in both the commercial and residential markets, driven both by Brexit but also broader geopolitical concerns.

John Chappell, Skegness, Chappell & Co Surveyors Ltd, john@chappellandcosurveyors.co.uk - Demand remains weak and continued uncertainty over the UK economy and the effects of Brexit, whatever the end game, do not bode well for an already weak High Street, nor businesses in general, facing shrinking customer demand on all fronts.

M A Lloyd, Leicester, Self-employed, mal1905@live.co.uk - Uncertainty still prevails and will for at least 12 to 24 months.

Richard Sutton MRICS, Nottingham, NG Chartered Surveyors, richards@ng-cs.com - The market remains relatively stable despite the pending Brexit date. Industrial carries on as if nothing has happened. Offices continue to split into desirable high quality and almost unlettable. Retail - don't go there.

Shaun Hadoc, Derby, Cabinet Office, shadoc@hotmail.co.uk - Uncertain but occupiers want to invest so seeking conclusion to Brexit.

Eastern

Anthony Barker BSc FRICS, Peterborough, Barker Storey Matthews, ajb@bsm.uk.com - We have seen a number of both leasehold and freehold transactions with companies put on hold due to the uncertainty over Brexit.

Chris Wilkins, Luton, Ashridge Estates Ltd, chris@ashridgeestates.co.uk - The uncertainty over where the economy is going will continue whilst there is no agreed Brexit plan.

Guy Gowing MRICS, Norwich, Arnolds Keys LLP, guy.gowing@arnoldskey.com - Demand in office and industrial sectors still strong despite Brexit uncertainty.

Jonathan Nelson, Norwich, RUA LLP, jonathan.nelson@richarduttingassociates.com - Markets are nervous, but demand is strong for industrial, as units do not currently exist on the market. This is a real growth area.

Les Long, Colchester, Eyesurvey Chartered Surveyors, ljl@eyesurvey.co.uk - Erratic and largely inactive. Rental negotiations protracted.

Mike Pheonix BSc MRICS, Stevenage, Brown & Lee, mike.pheonix@brownandlee.co.uk - Office market still weak, poor supply and poor demand. Industrial rents are increasing but signs they are at a peak. Brexit is still a concern.

Philip Woolner MRICS, Cambridge, Cheffins, philip.woolner@cheffins.co.uk - Occupier demand slowed during the last part of 2018 across all sectors, and this is likely to continue at least over the first part of 2019. Lack of availability across business space markets is holding values up.

Richard Bertram, Ipswich, Beane Wass & Box, rbertram@bw-b.co.uk - Strong demand for residential development/conversions under £250,000. Very limited occupational office demand and few enquiries for investments and little available stock. General lack of confidence in the market at present.

Sam Kingston, Norwich, Roche Chartered Surveyors, sam.kingston@rochesurveyors.co.uk - The market has cooled considerably over the past 3 months, due to uncertainty surrounding Brexit. However, with limited supply of office and industrial property, there shouldn't be any lowering of values in these sectors.

Simon Beeton MRICS, Harlow, Derrick Wade Waters Ltd., scb@dww.co.uk - Occupiers are generally cautious. No real depth to demand in any sector but still enough to get deals done. Some growth projections for industrial may prove to be ambitious.

Stuart T King BSc MRICS, North Hertfordshire, Davies King Chartered Surveyors, davesking@talk21.com - Brexit and politicians causing issues.

Stuart T King BSc MRICS, Letchworth, Davies King Chartered Surveyors, davesking@talk21.com - Brexit and negative comments by politicians are hurting the economy.

London

Anthony Saunders, London, Cuthbert Lake, anthonyisaunders@cuthbertlake.co.uk - In limbo in view of uncertain outcome of Brexit negotiations.

Charles McClean BSc MRICS, Westminster - C, C J McClean Associates Ltd., charlie@eshp.com - Brexit uncertainty is having a material effect on occupiers' vision of the future and most are holding back, awaiting clarity.

Charles Ostroumoff, London, Arca PRM, charlesostroumoff@hotmail.com - Continued uncertainty due to the lack of clarity over Brexit is affecting business, especially SME's, forcing key decisions to be delayed until Q2 2019. Assuming we have clarity by then and the world economy is still growing, we should see an uplift in the second half of the year. There are, however, risks around these two assumptions.

Chartered Surveyor market comments

Christopher Jago, London (South), Houston Lawrence, chris.jago@houstonlawrence.co.uk - The local market in South London across the board has been increasingly weakened as Brexit approaches and businesses directly or indirectly affected (ie business servicing large companies who are affected) are hesitating to make acquisition decisions and, those who are, frequently seek more competitive terms on flexible lease packages.

Ercan Baydur, London, Taylor Wimpey, ercan.baydur@hotmail.co.uk - Brexit continuing to cause uncertainty in the market.

Guy Bowring BSc MRICS, Victoria, Tuckerman, gbowring@tuckerman.co.uk - Lots of uncertainty but occupiers still active, even if seeking greater flexibility on lease lengths.

Habib Sanni, London, London Borough of Bexley, habib.sanni@gmail.com - There is uncertainty in the market due to the uncertainty around Brexit.

Ikenna Ezendiokwele, London, VVB Engineering UK Limited, ezendiokwele.i@googlemail.com - Post Brexit, the markets will slow down, property values across the board will take a hit and negative equity might ensue.

John Kent FRICS, London - West End, CBRE, john.kent@cbre.com - Although there is continuing demand from overseas investors, uncertainty around Brexit is impacting the investment market. Development activity remains subdued and construction starts are at a low level. Consequently, there will be a dearth of new schemes in 2020 - 2023. The agency market has proved surprisingly resilient, but occupiers are hesitant to commit, and so deals are taking longer. However, there is a lot of activity in the flex sector. As to rent reviews, uplifts are becoming rarer.

Justin Clack, West London, Frost Meadowcroft, jclack@frostmeadowcroft.com - Office take-up in the London Borough of Hammersmith & Fulham in 2018 was 677,000 sq ft, nearly a third more than the total for 2017 (409,000 sq ft) and treble that of for 2016 (201,000 sq ft). Despite the high take-up, supply rose in Hammersmith & Fulham from 7.6% to 8.3% availability as 228,752 sq ft of offices went to the market at The Big Red Workplace, 245 Hammersmith Road. The high supply of new offices and co-working availability is reducing the value of the secondary office locally.

Keith Hellen, London, LB Enfield, keith.hellen@ntlworld.com - Difficult to predict.

Mac, London, Macneel, maclal66@gmail.com - Not much change expected.

Mark Cherry, London, GAM, mark@thecherrys.co.uk - Stable but uncertain.

Olu Odeleye, London, Instalcom, olubunmi6@aol.co.uk - My observation is an initial move by few companies to relocation to other European cities due to Brexit but most companies are partial to remain in the UK. Though Brexit has an impact on the market, it should not have a lasting impact if the government could have a set strategy. The biggest issue is lack of unity to deliver Brexit.

Paul Krendel, London, Levy Real Estate LLP., paul.krendel@levyllp.co.uk - The commercial property market in Central London has generally held up quite well despite the economic and political uncertainty over the last 2 years.

Paul Spence, London, Paul J Spence Chartered Surveyor, pauljspence@clara.co.uk - We need to sort out Brexit now.

Peter Sudell, London, BNP Paribas Real Estate, peter.sudell@realestate.bnpparibas - Prospects of a Labour government more worrying than Brexit. Retail values need to make a market adjustment.

Richard Goldstein, London, michael.elliott, richardgoldstein@michaelelliott.co.uk - My experience of the market is that strong demand exists for well-let secure assets and opportunities with development potential. Investor demand is thin for short term income deals and vacant buildings, unless these attract owner occupiers. Overseas buyers remain keen to invest in London as lease structures appeal and they understand our legal system. A lot of the investment is for the purpose of wealth preservation which is why assets let on long leases currently attract the most competition.

Simon Kelly, London, Intrinsic Property, simonkelly54@googlemail.com - The restaurant sector of the UK property market has been hit in the past 12 months by the restructuring of many national chains. With the involvement of venture capital backers over the past 5-7 years, these chains have over expanded in a relentless 'chase for space' overriding operational quality. When coupled with weakening consumer demand, this has caused something of a market correction in terms of rent and capital value levels.

Stephen English, London, HBC Real Estate, stephenenglish@hanlonbennett.co.uk - The market remains nervous and will remain so until Brexit is sorted one way or another. Certainty will engender confidence.

Stephen Maskell, London, Maskell King Limited, stephen@maskell-king.co.uk - Pessimism.

Tony Milton, London, Salter Rex, amilton@salter-rex.co.uk - With the Brexit chaos it is impossible to foresee a positive future in the short-term.....though 3+ years things look positive for real estate (except residential prices).

W Nicol-Gent, London, Killochan & Co, louanna@blueyonder.co.uk - Conversions to "higher and best use" continue - largely residential.

North East

Andrew Mason, Sunderland, MD Insurance Services Limited, andrew.mason1811@yahoo.com - Significant number of Social Housing developments starting up in 2018, with further sites due in 2019.

Colin Vance, Sunderland, Sunderland City Council, colin.vance@sunderland.gov.uk - The uncertainty over Brexit will have a detrimental effect in the immediate and near future.

Dan Johnson, Darlington, Highways England, dan.johnson@highwaysengland.co.uk - The North East generally is less vulnerable to the potential economic threats posed by Brexit. Reliance on overseas investment, and exports is lower here than other parts of the country. Due to this, rents and property prices have been very subdued with growth post-recession amongst the lowest in the country. There is a general belief that capital values can't reduce much further from current positions. A market backdrop of limited investor enquiries shows very little indication of change.

David Downing, Newcastle upon Tyne, Sanderson Weatherall, david.downing@sw.co.uk - In the occupier market, some sectors remain strong, whilst others weaken. The prime office pipeline in Newcastle has improved, with ground being broken for The Lumen and a start anticipated in the next 12 months for The Spark at Newcastle Helix, which will bring over 200,000 sq ft of much needed Grade A stock to the market. The investment market remains buoyant with plenty of activity across all sectors.

Ian Miller, Newcastle upon Tyne, Luxury Leisure, ian.miller@luxury-leisure.co.uk - The market is experiencing and will continue to experience significant changes and we could see either slow growth or a substantial re-base depending on the political position.

Chartered Surveyor market comments

Kevan Carrick, Newcastle upon Tyne, JK Property Consultants LLP, kevan@jkpropertyconsultants.com - The market is relatively stable but availability of more grade A office space is required.

Malcolm G Holmes, Sunderland, ABP Property Consultants, malcolm@abppco.com - Difficult market in Sunderland - residential conversions seem to be in oversupply. Insufficient inward investment in city centre. Some early signs of growth in regeneration areas, and new residential build on green field still under expected target levels.

Peter Smith MRICS, Durham, Elvet Estates, peter@bfhee.com - Retail is suffering noticeably, compounded by 2 large schemes that have been in planning for some time starting and releasing new stock of A1, A3 and A4 to the market. This may act as a magnet and pull investment away from the centre of Durham or these schemes may fail to achieve the occupancy levels predicted. Either way, the effect on the city could be negative or will negatively impact other nearby centres.

Simon Haggie, Newcastle upon Tyne, Knight Frank LLP, simon.haggie@knightfrank.com - Surprisingly busy last quarter of 2018 in terms of enquiries for industrial space and some significant new factory/warehouse units under construction thanks to Amazon and Nissan's suppliers (although Nissan like most motor manufacturers has seen a major dip in sales and redundancies are in the immediate pipeline).

Tim Cameron-Jones, Leeds, Cushman and Wakefield, tim.cameron-jones@cushwake.com - My comments assume no significant economic shock, i.e. there will be an orderly Brexit. A no deal Brexit will have a significant short term adverse impact on occupier and investor confidence. As a regional market, it is less influenced by overseas investors and I expect demand from domestic investors to be maintained at a buoyant level by the weight of money currently in institutional funds.

North West

Andrew Taylorson, Preston, Eckersley, at@eckersleyproperty.co.uk - There remains a shortage of good industrial stock across the region. The lack of investment in new development is a concern. The office market is turning over but no real evidence of rental growth, just surplus space absorbing demand. The retail market is best described as challenging.

Andrew Wells, Liverpool, B&M Retail, amdrew.wells@bmeatil.co.uk - Retail market is in decline better deals are available for occupiers who can drive harder deals.

Brian Bailey BSc MRICS, Manchester, Edmundson Electrical Limited, brian.bailey@eel.co.uk - The prime industrial market is seeing tremendous growth across the UK through 2018, and 2019 is expected to be the same. Secondary industrial is still strong and supply of quality units is limited

Brian Ricketts MRICS, Liverpool, Hitchcock Wright & Partners, brianricketts@hwandp.co.uk - Shortage of supply of office and industrial stock is a key concern for Merseyside in the short to medium term, particularly over the next twelve months.

Christopher Learmont-Hughes, Liverpool, Burland Limited, chris@burlandlimited.co.uk - Increase in demand in the office and industrial sectors with a downturn in retail.

Damien Gibbs, Preston, Garside Waddingham Surveyors, damien.gibbs@garsidewaddingham.co.uk - In general terms, improved business confidence has led to an increased number of transactions but values are still not back up to pre recession levels. Industrial transactions remain strong. Offices and retail remain static. Mixed assets are the key.

John Ashall, Manchester, Sprin PCC Ltd, john.asahl@springandco.co.uk - As all will appreciate it is difficult to predict trends going forward until Brexit has been resolved one way or the other.

John Fifield, Manchester, Fifield Glyn Ltd, john.fifield@fifieldglyn.com - "Steady as she goes" apart from retail which is difficult, with the exception of true market towns (which offer something different to attract shoppers), and perhaps the regional purpose built shopping centres eg Trafford Centre, Metro Centre, Meadowhall, White City etc, where the mega stores are based together with F & B and Leisure.

John R A MacDonald, Manchester, MacDonald Hogg, john@avsv.co.uk - Brexit is a mess and creating uncertainty.

Kevin Tobin, Manchester, Jacobs UK, kevin.tobin@jacobs.com - The high street continues see the ongoing retail decline and I expect to see a number of large department store chains struggle/ go under over the next 12 months. City and town centres need to totally re-think how they work and what their main function should be. Large, bold, and decisive investment will be required quickly to prevent town centres in particular becoming 'forgotten' spaces.

Martin Andrew Walton BSc FRICS, Tameside, Waltons, mw@waltonswb.com - Brexit yet to impact on cheaper retail and industrial but a lot of people are holding back disposals.

Matthew Salt, Manchester, Emerson Management Services, mattsalt9410@gmail.com - Seem to be reaching a peak in value but a market crash is expected in the aftermath of Brexit.

Paul Nolan BSc FRICS, Bury, Nolan Redshaw, paul@nolanredshaw.co.uk - The industrial market remains strong and with the Chamberhall scheme starting in 2019, the level of supply will increase to match demand. Recent office deals give some suggestion that the market is improving. Retail remains difficult.

Paul Nolan BSc FRICS, Oldham, Nolan Redshaw, paul@nolanredshaw.co.uk - The most recent industrial scheme at Victoria trading estate is now fully-let at record rents which is a good indication of the strength of the market. The forthcoming Wallinwood Business Park Offices are eagerly awaited.

Sean Reed, Carlisle, Sean C. Reed Ltd (Chartered Surveyors), sean.c.reed@btintetnet.com - Keep the faith, don't panic.

Terence Carnes, Manchester, Live Nation, terry.surveyor@outlook.com - Brexit will, in my opinion, be a major issue over the next two years causing property markets to remain static or drop below current values. Uncertainty is causing the market to procrastinate.

Tom Carew, Birkenhead, Smith & Sons, tcc@smithandsons.net - Brexit seems to be scaring people off from signing leases.

Northern Ireland

PD Lynch, Belfast, Lagan, dermotlynch1@virginmedia.com - Not great overall.

Scotland

Alexander, Aberdeen, A B Robb Ltd, alex@abrobb.com - Brexit will be a problem in retaining major players in Scotland but an even greater hurdle will be the Scottish tax levels when compared with the rest of the UK.

David Castles, Glasgow, Ian Philp Glasgow Ltd, david@philpholdings.co.uk - Market conditions still volatile especially in secondary retail sector and 2019 will be another challenging year.

Emma Mackay, Irvine, North Ayrshire Council, emmamackay@north-ayrshire.gov.uk - Without yet knowing the outcome and finer details of Brexit, expectations are variable.

Olusoladotun Faleye, Aberdeen, GVJB, olusoladotun@yahoo.com - Potentially less predictable in the short term and tending towards a buyers market.

Chartered Surveyor market comments

Richard Fox, Glasgow, Richard Fox Chartered Surveyor, richardgfox@hotmail.co.uk - I have never in my 67 years known the economy to be in such a state of uncertainty. The whole political scenario is a total burach (Gaelic for mess).

Simon Metcalfe, Edinburgh, Gleeds Cost Management, simon.metcalfe@gleeds.co.uk - Busy currently, however, retail market is suffering from the online companies and future is uncertain due to Brexit and Scottish Independence which is still hanging over Scotland.

South East

Allan Pickering, Winchester, Goadsby, allan.pickering@goadsby.com - Uncertainty in the market caused by Brexit.

Andrew Reed, South East, RS Retail, areed@rsretail.co.uk - Landlords of retail properties are still way behind the times and are in denial about the current state of the retail market and future rental values heading in a downward direction. It's no time to keep their heads stuck in the sand - it's akin to Trump's denial of climate change. Both situations are based on financial loyalties.

Christopher Marriott FRICS, Faringdon, Oxon, Marriotts Property LLP, christopher.marriott@marriotts.co.uk - Most of our instructions are for small, secondary properties but even for those there is a hesitation to commit prior to Brexit. Second, the market for retail properties in small market towns, especially those where the banks have pulled out, is fragile in the extreme.

Colin Brades, Brighton & Hove, GVA, colin.brades@gva.co.uk - All sectors marked time in Q4, apart from secondary retail, which continues to weaken.

David Boyden, Colchester, Boydens, david.boyden@boydens.co.uk - All prospective buyers/tenants proceeding with great care and ensuring all the boxes are ticked.

David Martin BSc FRICS, Brighton, Stiles Harold Williams, dmartin@shw.co.uk - Strong interest in the office market in Central Brighton. Office rents and industrial rents continuing to push upwards due to the lack of availability. Limited pipeline supply of industrial.

Emma Goodford, South East Home Counties., Knight Frank LLP, emma.goodford@knightfrank.com - New active demand has reduced by 18% in the last quarter of 2018 and significantly the overall number of requirements has reduced since 2016/Brexit. Spec development has reduced and ground up development less likely than refurbishment. Crossrail centres dominate take up and the West London market is dominant.

Francis Tomlinson, Hitchin, Aitchison Raffety, francis.tomlinson@argroup.co.uk - Current low level of confidence.

G A Willey, Chelmsford, T Rippon Estates Ltd, geoff@rippons.co.uk - Limited activity at present due to the season and the uncertainty of Brexit.

Gerard Tvedt, Sunningdale, Tvedt Group Ltd, gerrytvedt@tvedt.co.uk - These predictions are, of course, made blindly without knowing the precise nature of our exit from the European Union and, more importantly in my view, the spectre of a Corbyn led labour government. This is not political partisanship on my part, as both of these issues will bear heavily on the commercial property market irrespective of any of our personal views.

Giles Blagden, Reading, Hicks Baker, g.blagden@hicksbaker.co.uk - I consider that the general underlying demand for property is good, particularly for investment, but that the short term outlook over the next three months at least (while the Government tries to sort out Brexit) remains a challenge for property businesses and has certainly impacted on demand and deals over the last two months or so.

Giles Worrall, South East, Cluttons, giles.worrall@cluttons.com - Market peak for office inv, still more pain for retail, see Q4 valuations hitting IPD. Sheds stable but close to peak.

Hugh Mcshane, Brighton and Hove, Crickmay Chartered Surveyors, hm@crickmay.co.uk - Office and industrial values continue to grow due to lack of supply, retail market continues to be difficult due to online competition.

Iain Steele FRICS, Farnham, Park Steele, iain@parksteele.com - Industrial continues to be in strong demand. Small offices also continue to let well. There are retail enquiries from independents but the sector remains cautious.

Ian, Portsmouth, Cyan Power CPM Limited, imp@cyanpower.com - If trade counter demand is stripped out of the industrial market, then performance will be unspectacular. Industrial values have to rise to justify new buildings. The prime market has dragged the value of used space along behind. Offices are increasingly sophisticated in terms of facilities. Rising rents must be analysed in relation to the quality of the buildings. There are too many shops, but what can you do with them? So many do not lend themselves to other uses.

J R Spacey, Maidstone, Cobbs Consultancy, cobbconsult@gmail.com - Retail market suffering from internet shopping, casual Dining and restaurants closing due to customer apathy, poor offers, take away delivery firms---Deliveroo etc, Supermarket dining offers. Pubs suffering downturn due to uncompetitive pricing because of high duty, poor offers and fit outs. High Streets have a major problem with parking costs --£1.70 per hour in Canterbury £3 ph in Greenwich.

Jean Howe, Luton, Kirkby Diamond, jean.howe@kirkbydiamond.co.uk - Industrial is still overvalued, but a shortage of stock has fuelled capital value rises since October 2016. Offices have been stable for last 2 years. Local retail is stable but general weakening of sentiment is evident.

Jeremy Braybrooke, Southampton, Osmond Brookes, jeremy.braybrooke@osmondbrookes.co.uk - While Brexit itself is not really the reason for any downturn, the 'uncertainty' caused by it certainly is. Add to this a general economic slackening in spending power and an increasing inclination to buy more online and you have a pending perfect storm for the High Street. As we agents have a tendency to say, 2019 will be an 'interesting' year.

Jeremy Cracknell, London and the South East, DP World London Gateway, jeremy.cracknell@dpworld.com - While the uncertainty around Brexit remains and looks likely to be unresolved for some time, it will have the potential to stall the market generally - but businesses have to keep moving and so we anticipate continued strong demand but a mixed approach of cautiously optimistic.

John Parker, London & South East, Terrarossa Project, john@terrarossaproject.co.uk - Once all of the unnecessary and grossly exaggerated scaremongering about Brexit has died away, the market will recover and thrive, without the uncertainty.

John Pike, Maidstone, King & Johnston, john.pike2@outlook.com - Market likely to continue to weaken in most sectors until Brexit is properly resolved and future trading opportunities are clearer.

Chartered Surveyor market comments

Jonathan Hunnibal, London/South East, Glenny LLP, j.hunnibal@glenny.co.uk - Occupier demand and enquires have dropped off significantly in the run up to the Christmas holiday season. Expect this to recover in January, but not to levels previously seen, due to continued uncertainty over Brexit. Industrial rental levels holding firm at the moment.

Jonathan Mack, Horsham, West Sussex, Crickmay Chartered Surveyors, jm@crickmay.co.uk - We are typically finding both purchasers and prospective tenants to be hesitating at the present time, whilst clearly they are waiting to see what comes of the Brexit negotiations. We are still finding the industrial market remains strong, with very limited supply currently available within the local area.

Mark Skelton MRICS, Epsom, Stiles Harold Williams, mskelton@shw.co.uk - Office market slow, low supply but weak demand, lease event driven. Industrial good but very little stock.

Martin Trundle, Chichester West Sussex, Henry Adams, martin.trundle@henryadams.co.uk - Caution, but the general levels of low business supply space will underpin values. We expect more activity 2nd half 2019 as the outcome of Brexit will be known.

Matthew Pellereau, South East, Matthew Pellereau Ltd, mpellereau@aol.com - We trade in a time of great uncertainty, with retail high street suffering the effects of online service, but the demand for freehold is consistent across the sectors. The leasing market is still good for industrial but tricky for retail and office premises.

Peter Dalby, Southampton, Holloway Iliffe & Mitchell, peter@hi-m.co.uk - The continuing uncertainty over Brexit is having a negative impact on the market.

Peter Ridsdale Smith, Tunbridge Wells, Bracketts, peter@bracketts.co.uk - Brexit and consumer confidence is continuing to weigh heavy on the market with related uncertainty, though there are some bright spots for well located properties sensibly priced on a capital and rental basis.

R Hill, Salisbury, HBAS Ltd, r.hill@historicbuilding.co.uk - Lack of confidence resulting from huge uncertainty about what is going to happen in the next 3 - 6 months.

Richard Phillips, Andover, Waverley surveys ltd, richard@wbicdevelopments.co.uk - Good.

Robert Lee, Portsmouth, Hants Realty Ltd, robert.lee@hantsrealty.co.uk - I believe we have passed the peak of the market, however, some agents and investors appear to think otherwise - quoting high prices as if we are still in a growing market. With all of the political uncertainty in the UK and Worldwide, I believe a correction is inevitable in 2019/2020.

Shaun Walters BSc MRICS, Reading, Parkinson Holt, swalters@parkinsonholt.com - General enquiries are lower and property is taking longer to shift.

Stuart Clark, Worthing, West Sussex, Marshall Clark LLP, s-clark@marshallclark.co.uk - In our view, the market is in almost a state of suspense awaiting the outcome of Brexit. When it knows what is happening then investors we speak to can start to buy again. The impression we receive is that investors money is being held because they are prepared to take the risk that values might increase in the next 12-24months (considered unlikely) but feel much more that they will go down. So, why buy now when a better deal may be available in a few months' time?

Victoria Parker, Goudhurst, Kent, Spurdow, victoria.parker@spurdow.co.uk - Radical reform required to Business Rates. Free town centre shoppers' parking by local authorities. Salisbury introduced free shopper parking after the Novochock attacks. Car parks are full and the shops and restaurants buzzing. It's not rocket science.

South West

A R Edgcumbe FRICS, Taunton, Larkman Edgcumbe Ltd., ae@larkmanedgcumbe.co.uk - Retailers are holding their breath, hoping Christmas won't be a washout.

Andrew, Plymouth, Ireland Weller, andrew01@irelandweller.co.uk - Retail valuation will deteriorate further.

Andrew Hosking BSc MRICS, Barnstaple, Stratton Creber Commercial, andrew@sccexeter.co.uk - The town is bearing up well despite the headwinds of Brexit uncertainty.

Andrew Hosking BSc MRICS, Exeter, Stratton Creber Commercial, andrew@sccexeter.co.uk - Exeter is maintaining its position as the most successful commercial location in Devon and Cornwall

Andrew Hosking BSc MRICS, Torbay, Stratton Creber Commercial, andrew@sccexeter.co.uk - Torbay (particularly in Torquay), town centre retail remains challenging.

Andrew Kilpatrick, Swindon, Kilpatrick & Co, a.kilpatrick@kilpatrick-cpc.co.uk - Market continues to be subdued thanks to the Brexit chaos, undermining economic and consumer confidence in Swindon, as elsewhere.

Ashleigh Phillips, Plymouth, Bruton Knowles, ashleigh.phillips@brutonknowles.co.uk - The South West market continues to operate freely, however, there is clearly apprehension of the possible impact of Brexit. Secondary lenders are more prevalent in development where money is expensive. On the whole the Devon and Cornwall market continues to operate towards the top of its normal range. Activity levels are reasonable.

Chris, Bristol, C Squared Property Developments Ltd, cw@c2pd.com - Land values are too high compared to sales values and rate of sales.

David Perry, Redruth, Wm G Weller & Son Ltd, david@wmweller.co.uk - The uncertainty with the exit/remain/on hold strategy for BREXIT is probably the most influential factor for investors at present. With any business, decisions need to be made to move forward, so politicians should do their jobs and place their personal political aspirations aside.

Gideon, Wellington, Foxmoor Ltd, sumption@stacks.co.uk - Sheds here are doing well, particularly small business units sub 2,000 sq ft.

John Plimmer FRICS, Exeter, private investor, jcoplimmer@gmail.com - Not all bad but it could change rapidly due to external factors.

Kim Moreton, Bristol, 2M Research and Survey, kimmoretomr@icloud.com - Uncertainty damages value. Weak government, with weak opposition, does nothing to foster prosperity and continuity. Disruption is a marketing tool for start-ups, not a suitable economic tool for a government.

Leslie Warren, Bristol, G4S Cash Solutions (UK) Ltd., leslie.warren@uk.g4s.com - Demand for logistics space evident.

Chartered Surveyor market comments

Malcolm White MRICS, Exeter, The Robinson White Partnership, malcolmwhite@robinson-white.com - There is a shortage of office and industrial space in the area and new constructions and rates will start to increase.

Marcus Arundell, Bath, HomeLets, marcus@homeletsbath.co.uk - All in all, a fairly positive picture given the current and forecasted political uncertainty over our leadership and Brexit positions.

Matthew Blaken, Bristol, DJ&P Newland Rennie, matthew@djangp.co.uk - The wider anxiety concerning Brexit has been tempered at a local level by strong regional activity in and around Bristol and in South Wales, buoyed by the anticipation of increased activity with the removal of the Severn Bridge tolls. At local High Street level, conditions are difficult, with niche, website independent businesses being the main suitors.

Michael Oldrieve, Exeter, Vickery Holman, moldrieve@vickeryholman.com - Market cooled towards the end of 2018 but still looking busy despite Brexit.

Michael T Ripley FRICS, Weston-Super-Mare, Stephen & co, michael@stephenand.co.uk - Concern and uncertainty due to Brexit as well as the decline of the high street more generally.

Paul Bennett MRICS, Exeter, Ravenslade, pbennett@ravenslade.co.uk - Hinckley Point is a significant South West project which will influence many factors over next 1 - 2 years in terms of demand from occupiers and businesses who have secured HPL contracts and also labour availability affecting the construction market.

Phil Pratt, Gloucester, Alder King, ppratt@alderking.com - Future market performance is likely to remain uncertain until the implications of Brexit are known ('deal or no deal'). Retail is the main concern.

Phil Wiltshire, Cornwall & Devon, Philips Rogers Ltd., pwtlshire@philipsrogers.co.uk - Demand for B class development land remains strong with limited supply. Larger industrial units (8,000 to 10,000 sq.ft) are in less demand. Some larger vacant units are being altered to accommodate demand for smaller units (1,000 to 2,000 sq.ft). There is increased demand from regional and national trade counter occupiers seeking prime and secondary industrial. Retail is continuing to decline with limited interest for larger units in towns. Some retail units are evolving to non-retail uses.

Robert Holley, Stow-On-The-Wold and North Cotswolds, Tayler and Fletcher, robert.holley@taylerandfletcher.co.uk - A little bit of nervousness sensed in the market but more concern over amount of national retail chains struggling. Is this the beginning of a rice correction for retail? The Cotswolds tends to remain pretty resilient through these times.

Russell Porter, Teignmouth, Porter Planning Economics Ltd, russ.porter@porterpe.com - Since the Brexit referendum result, the level of uncertainty has been increasing, which is having a negative impact on short term investment. Depending on the outcome of the Brexit negotiations, there could be anything from a short term surge in investment to a longer term overall decline in investment.

Simon Greenslade BSc MRICS, Exeter, Stratton Creber Commercial, simon@sccexeter.co.uk - Lack of occupier activity in all markets due to Brexit uncertainty.

Simon Walsham, Bournemouth Poole and Christchurch, James and Sons, simonwalsham@jamesandsons.co.uk - Good demand in office and industrial markets contrasting with a weak retail sector.

Tim Maggs, Bristol, Maggs & Allen, timm@maggsandallen.co.uk - Tough market conditions with a lack of stock.

Tim Wright, Yeovil, RMW Knight, tim@rmwknight.com - The market remains reasonably stable in our region although enquiries were obviously subdued over the Christmas holidays. The industrial sector remains stronger than the office or retail sectors.

Wales

Andrew Morgan FRICS, Lampeter, Morgan and Davies, lampeter@morgananddavies.co.uk - A generally difficult time continues. If vendors are keen to secure a deal and listen to honest advice then deals can be achieved. However, there are still some overambitious clients who continue to live in the past. Times have changed. A lack of quality in the new build sector.

Chris Sutton, Cardiff, JLL, chris.sutton@eu.jll.com - The downturn in high street retail has been most keenly felt in our secondary centres; further retail casualties are expected this year. Investor demand has remained robust, reflecting the weight of money in the market. Prime assets in Cardiff city centre are most in demand. The abolition of the Severn Bridge tolls has already had a positive impact upon demand from logistics companies, however, there is a sense that some manufacturers have put investment plans on hold awaiting Brexit certainty.

Jason Thorne, Swansea, Lambert Smith Hampton, jthorne@lsh.co.uk - 2018 has been a very strong year for the commercial property market in South West Wales. Industrial rental and capital values have continued to increase. Stability has returned to the office market, with pre-recession rental levels being achieved on prime office suites. Retail continues to struggle. 2019 could be a challenging year if the political uncertainty continues. But the Swansea Bay market is well placed to deal with any short term downturn. The market badly needs new quality premises.

Jonathan Williams, Wrexham, Jon Williams Commercial LLP, jon@jwcommercial.biz - From my own company perspective, particularly in North Wales and Cheshire, where I have practiced for approaching 40 years, the retail property market is in a perilous state with little sign of any improvement due to the uncertainty of Brexit and the penal rating system which our politicians seem unable or unwilling to grasp. Locally the industrial sector is generally performing well but the office market is still sterile with an oversupply of space. Negative but true I regret to say.

Keith Pritchard, Swansea, Encon construction ltd, kpritchard@encon.uk.com - Due to Brexit, I feel that there will be a significant downturn especially in construction. It will be interesting to see the effects on social housing and how it will sustain its required growth.

Rowland Jones, Swansea, Rowland Jones Chartered Surveyors, rowland@rowlandjones.co.uk - There is a high level of uncertainty in the market. Lenders and purchasers are cautious to predict what will happen in the coming months.

West Midlands

Adam Goodwin MRICS, Herefordshire and Worcestershire, John Goodwin FRICS, adam@johngoodwin.co.uk - General level of enquiries have fallen, and this is because of a lack of confidence due to political and economic uncertainty caused by the Government's handling of Brexit, and uncertainty regarding what our future trading & financial position will be in the medium term.

Chartered Surveyor market comments

Alan Pemberton, Birmingham, TFT LLP, apemberton@tftconsultants.com - Despite the concerns surrounding Brexit, transactions in all sectors apart from retail in Birmingham and immediate surrounding commercial markets remain strong, although how this will continue in 2019 and beyond is difficult to predict. Student accommodation demand remains strong and buy to rent is emerging with new substantial developments planned for delivery late 2019- 2020.

Anthony Rowland MRICS, Evesham, Sheldon Bosley Knight, trowland@sheldonbosleyknight.co.uk - Brexit uncertainty is a killer for business confidence, and this reflects in the property market.

Caroline Norton, Birmingham, Pall mall, carolinenorton@live.co.uk - There is a good level of demand for secondary / tertiary industrial, however, mention is being made of Brexit.

Graham Jones, Lichfield, Kingston Commercial Property Consultants, graham.jones@kingstoncpc.co.uk - Although the general level of enquiries has remained strong, there seems to be a greater degree of "sitting on hands" and reluctance to commit, particularly in the office sector, which presumably is a due to uncertainty over Brexit.

Jonathan Moore MRICS, Coventry, Holt Commercial, jon@holtcommercial.co.uk - A nervy occupational market continues, haunted by the shadow of Brexit. Nevertheless, strength in the logistics market continues to shine through along with a competitive market for well-let investment stock.

Michael Jones FRICS, Bromyard, Michael D Jones, mdjones@charteredsurveyor@virgin.net - The retail market locally has been under attack on two fronts now, namely due to the online phenomenon continuing to roll on and the uncertainty caused by the so called Brexit stalemate politically.

Michael Jones FRICS, Worcester, Michael D Jones, mdjones@charteredsurveyor@virgin.net - The retail market is continuing to deteriorate locally with a significant number of secondary shops falling empty and the voids not being filled.

Neil Harris, Birmingham, Harris Lamb, neil.harris@harrislb.com - A Brexit 'end game' solution is required urgently, whether that is 'No Deal' or a variant that truly honours the Referendum result.

Nick Waddington, Birmingham, MWRE, nick.waddington@mwre.co.uk - Steady.

Peter Burnett, Staffs, Chivers commercial, pburnett@chiverscommercial.co.uk - The market is trying to ignore Brexit and political uncertainty but wants a resolution to give more certainty. Local factors for us are the main determining forces still although any negative impact of Brexit etc will feed its way through. Some parties are choosing to sit on hands and await the outcome of Brexit before committing.

Ralph Minott, Birmingham, Calthorpe Esated, ralph.minott@sky.com - The West Midlands is presenting a case for market interest, with opportunities for southern migration and investment. With HS2 'on the horizon, prime and secondary property in the likes of Birmingham, are becoming attractive for long term cost saving relocation, investment growth, with good accessibility.

Rhys Sandbrook, Bromsgrove, R O Sandbrook Ltd, enquiries@rosandbrook.co.uk - Rather flat pending Brexit chaos.

Richard Clader BSc FRICS, Lichfield, Calders, richard.calderssurveyors.com - Increasing Brexit driven nervousness is now becoming apparent.

Stephen R. L. Phillips, Hereford, Herefordshire Housing Ltd., srlphillips@hotmail.com - Most of the commercial property that I manage for Herefordshire Housing Ltd. comprises suburban shops for which demand remains strong, albeit at relatively low rents. Modest uplifts are still, however, being obtained on rent review.

Tony Rushton, Newcastle Under Lyme, InHealth Group, tonyr6kww@live.com - Market in healthcare seems as busy as ever, both public and private.

Yorkshire & the Humber

Alan Dickinson FRICS, Hull, Dukes Sutton & Dickinson, dickinsons@dickinsons.karoo.co.uk - More investment by national companies or Government bodies required in the Hull area particularly.

Graeme Haigh MRICS, Huddersfield, Bramleys LLP, graeme.haigh@bramleys1.co.uk - The first signs of Brexit caution have been witnessed in the last three months. This has however failed to dampen prices particularly for freehold industrial property which continue to grow. Other sectors have seen lengthening marketing periods. The preference to buy, rather than rent, remains and the frustration at the lack of available stock continues.

James Swann, Sheffield, Fowler Sandford LLP, james.swann@fowersandford.com - Until Brexit is complete uncertainty will be the prevailing factor.

James Thornton, London, Rosemount Estates, jimmythornton@hotmail.com - Our tenants are starting to struggle from the uncertainty of Brexit.

John Reeves, York, Helmsley group, john-reeves@helmsley.co.uk - Just get on with Brexit and get rid of the uncertainty.

M W Darwin, Northallerton, M W Darwin & Sons, info@darwin-homes.co.uk - Weak demand over all sectors at present, worries have grown over the economy as the year has gone on, confidence affected by lack of certainty caused by Brexit.

Matthew Tomlinson, Hull, Doric Surveyors, matthew@doricurveyors.com - Lack of availability of freehold stock specifically across the lower end of the industrial sector size range (sub 10,000 Sq ft) both for owner occupation and investment. Increase build costs brought about by inflation and further regulations in respect of building control are having an impact on developers which in turn is reducing the supply of the availability of new stock.

Paul Nunn MRICS, Sheffield, Wates Construction, paul.nunn@hotmail.co.uk - Buoyant private sector market currently, public sector investment in Yorkshire and the Humber still low.

Richard Corby BSc (Hons) MRICS, Leeds, Lambert Smith Hampton, rcorby@ish.co.uk - The Brexit effect has only been felt in the last four weeks, but it will cause a hiatus for the next few months.

Richard Ellison, Leeds, Babcock International, richard.ellison@babcockinternational.com - Generally stable market conditions apart from retail which is reacting poorly to market led demand.

Timothy, Harrogate, Parker Beevers Ltd, tim@parkerbeevers.co.uk - Please try to remain positive.

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