



## August 2018: UK Residential Market Survey

# Prices continue to rise in much of the UK

- Robust price growth reported across Scotland and Northern Ireland
- New instructions edge further into negative territory
- Sales expectations suggest activity is likely to remain stronger away from the south of England

Amidst reports of house prices (nationally) posting the sharpest monthly decline since July 2012, it is noteworthy that the August 2018 RICS Residential Market survey continues to show stronger trends in large parts of the UK. Significantly, whilst sentiment remains downbeat in London, parts of the wider South East, and to some extent, East Anglia, the results remain more solid in other areas, with Northern Ireland and Scotland in particular standing out.

This disconnect is most evident in the headline price balance series. For example, the latest reading for Northern Ireland came in at +48%; this indicator has now been in positive territory for 60 consecutive months. Despite the sustained period of growth however, house prices in Northern Ireland still remain below their 2007 peak. For Scotland, the August net balance was also solid, at +36%, and very close to the average over the first seven months of the year. Furthermore, this key indicator stands at +39% in Wales, and also remains firmly positive across the North West, the Midlands as well as in Yorkshire and Humberside. Nevertheless, weakness in London and the South East continues to provide an offsetting impact, leading the headline net balance to dip to +2%, compared with +4% in July. Overall, this is broadly consistent with no change in prices over the period as far as the national market is concerned.

The picture regarding activity is a little less clear cut, with a flatter trend more generally. The Newly Agreed Sales net balance came in at -10% which represents the most negative reading on this metric for five months. As such, this result is pointing towards a modest decline in sales transactions. Disaggregating the data shows that, after a sharp fall in activity near the back end of last year, sales trends are at least stabilising in the capital, although there remains little in the way of positive impetus. The latest results also point to subdued momentum across East Anglia and the South East. By way of contrast, sales trends are solid in Northern Ireland and the South West. Going forward, near term sales expectations suggest this regional divergence will persist, with the market remaining relatively stronger away from the South of England.

The survey has previously highlighted a lack of supply in the housing market as one of the main impediments to

activity. The latest results reiterate this message, as the average inventory of unsold stock on estate agents' books inched back towards the historic lows posted earlier this year. Moreover, the New Instructions net balance slipped to -15% in August from -3% previously, pointing to a decline in the supply of fresh stock coming on to the market. This result was, to some degree, foreseeable given the run rate of new appraisals by property valuers had been down in comparison to last year over the previous few reports. For the record, the appraisals net balance was once again negative in August which does not bode well for the new instructions pipeline in the coming months.

With regards to demand, the New Buyer Enquiries net balance figure of -6% is still consistent with a more or less flat trend in buyer demand. The latest figure has not deviated much from the last two readings of zero and +1%, although it does portray a slightly more cautious approach from property purchasers. This is not entirely surprising in the wake of the Bank of England's decision to increase interest rates in August alongside the broader political and economic uncertainty influencing the sales market. Even so, buyer appetite is still reportedly strong in Northern Ireland and Yorkshire and Humberside.

Turning to the lettings market, the latest numbers (which form a part of non-seasonally adjusted series) point to a further decline in fresh rental stock coming to the market, a trend that has been emerging on the back of tax changes on Buy-to-Let properties. Indeed, contributors reported a drop in new instructions (-18%) for the twenty-third consecutive month. Meanwhile, tenant demand continues to rise firmly, with a net balance of +22% marking the strongest reading since October 2016. As a result of the supply-demand imbalance, near term rent expectations point to further rental growth in the coming three months. Significantly feedback from London is also pointing to the imbalance between tenant demand and supply beginning to widen which has pushed up rental projections for the year ahead.

Further out, rents are expected to rise at a faster rate than house prices; average rental growth projections stand at around 3% per annum for the next five years whilst prices are projected to rise by around 2% on the same basis.

\*The London data tends to better reflect developments in the inner boroughs rather than the outer zones

# 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:

- How have average prices changed over the last 3 months? (down/ same/ up)
  - How have new buyer enquiries changed over the last month? (down/ same/ up)
  - How have new vendor instructions changed over the last month? (down/ same/ up)
  - How have agreed sales changed over the last month? (down/ same/ up)
  - How do you expect prices to change over the next 3 months? (down/ same/ up)
  - How do you expect prices to change over the next 12 months? (% band, range options)
  - How do you expect prices to change over the next 5 years? (% band, range options)
  - How do you expect sales to change over the next 3 months? (down/ same/ up)
  - How do you expect sales to change over the next 12 months? (down/ same/ up)
  - Total sales over last 3 months i.e. post contract exchange (level)?
  - Total number of unsold houses on books (level)?
  - Total number of sales branches questions 1 & 2 relate to (level)?
  - How long does the average sales take from listing to completion (weeks)?
  - How has tenant demand changed over the last 3 months? (down/ same/ up)
  - How have landlords instructions changed over the last 3 months? (down/ same/ up)
  - How do you expect rents to change over the next 3 months? (down/ same/ up)
  - How do you expect average rents, in your area, to change over the next 12 months? (% band, range options)
  - What do you expect the average annual growth rate in rents will be over the next 5 years in your area? (% band, range options)
  - What is your sense of current price levels being achieved in your area (Very Expensive, Expensive, Fair value, Cheap, Very Cheap)
- 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 dates:

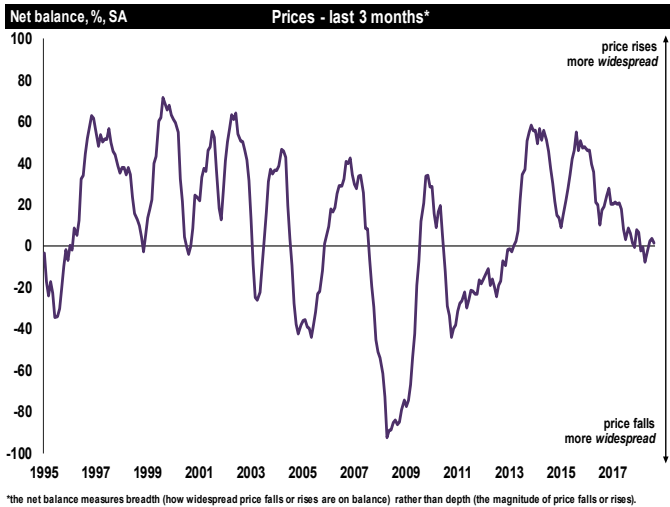
- September Survey: 11 October**
- October Survey: 8 November**
- November Survey: 13 December**

## Number of responses to this month's survey:

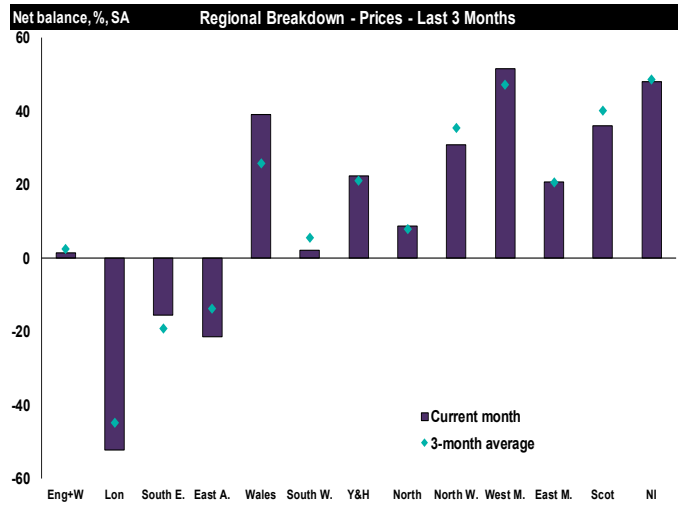
- This survey sample covers 592 branches coming from 313 responses

# Sales market charts

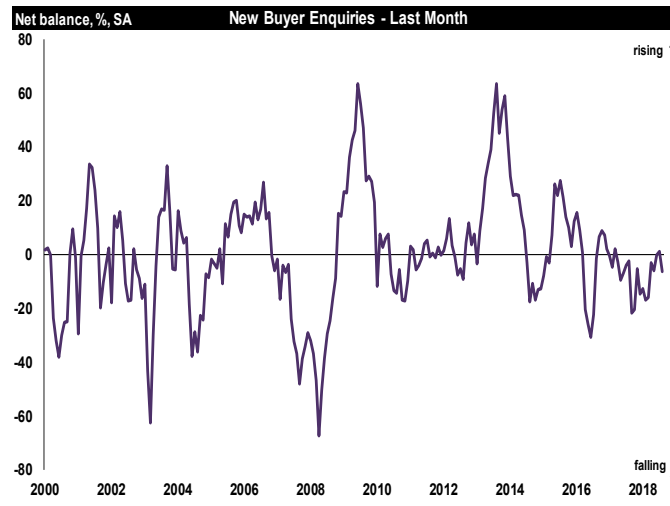
National Prices - Past three months



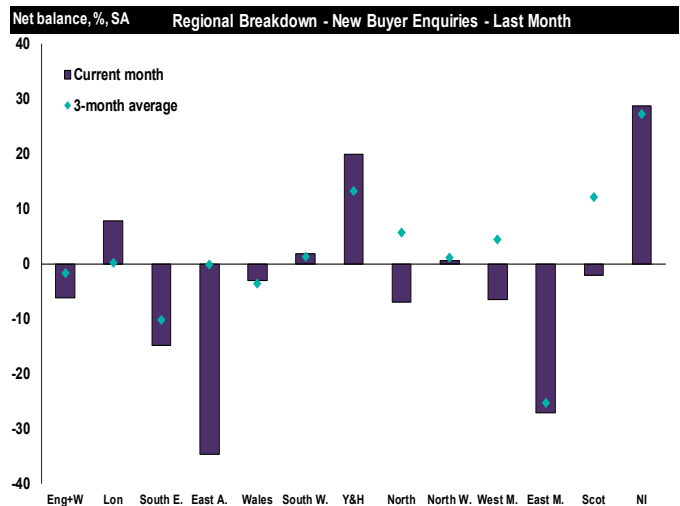
Regional Prices - Past three months



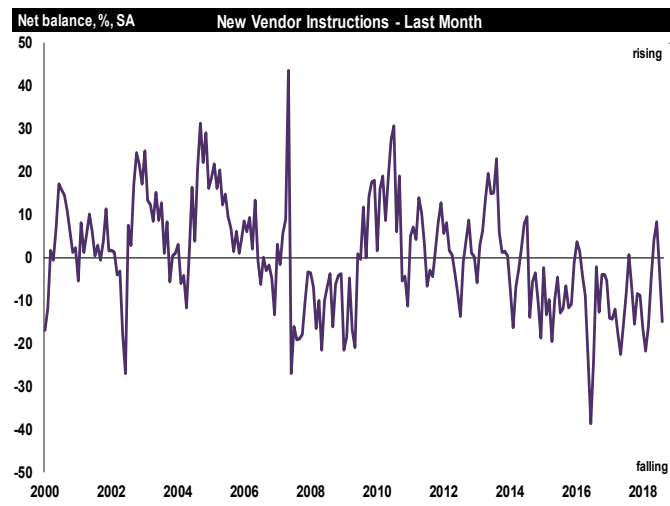
National Enquiries - Past month



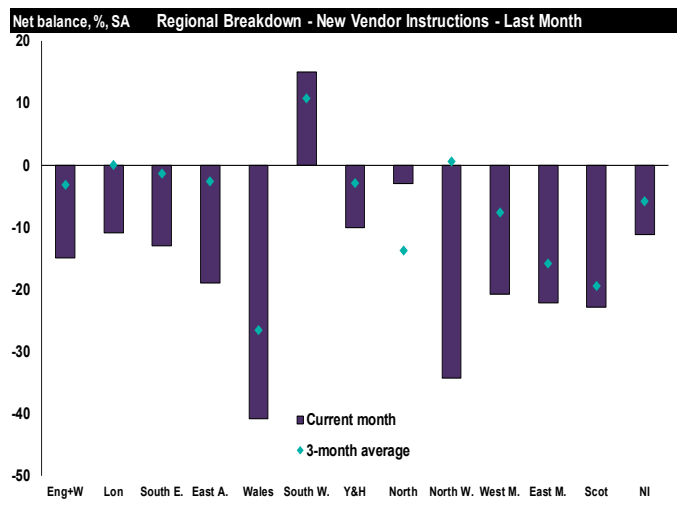
Regional Enquiries - Past month



National New Vendor Instructions - Past month

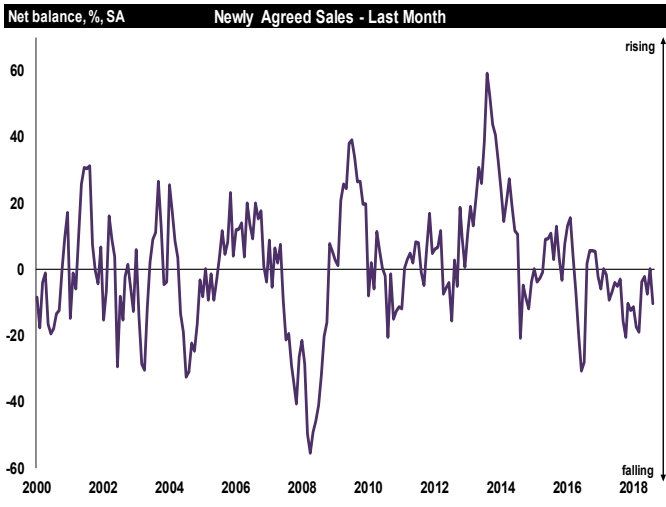


Regional New Vendor Instructions - Past month

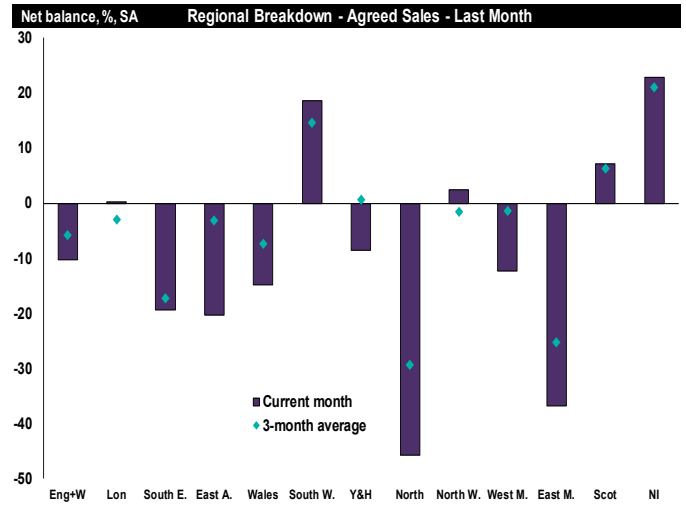


# Sales market charts

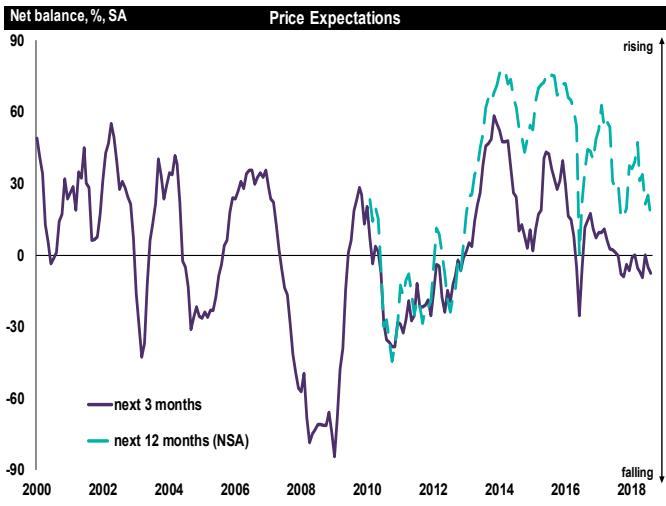
National Newly Agreed Sales - Past month



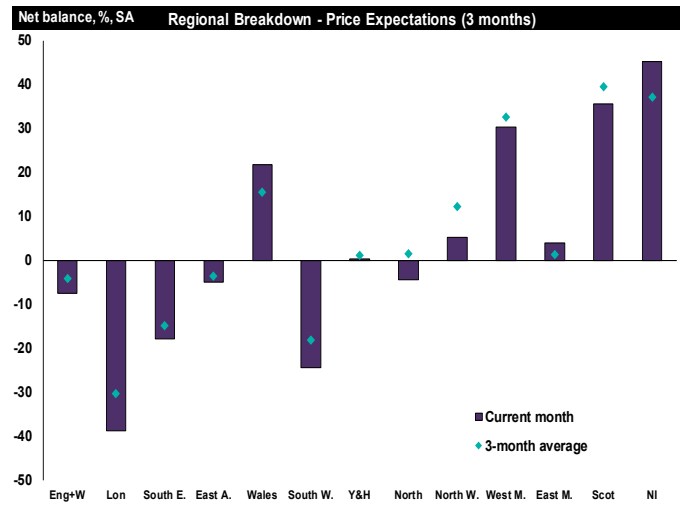
Regional Newly Agreed Sales - Past month



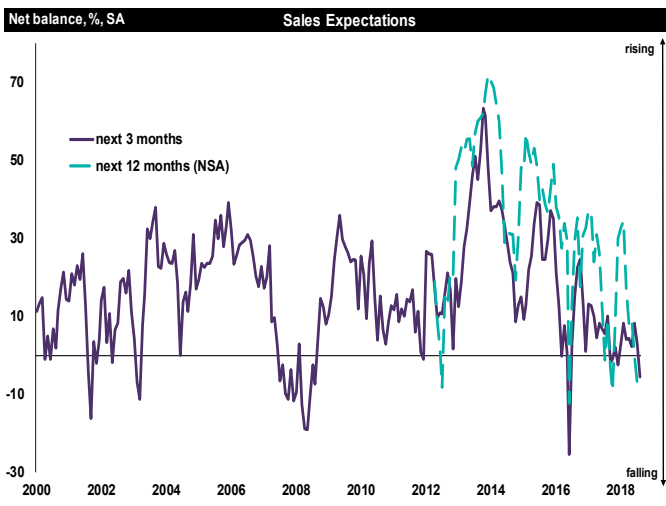
National Price Expectations - Three and twelve month expectations



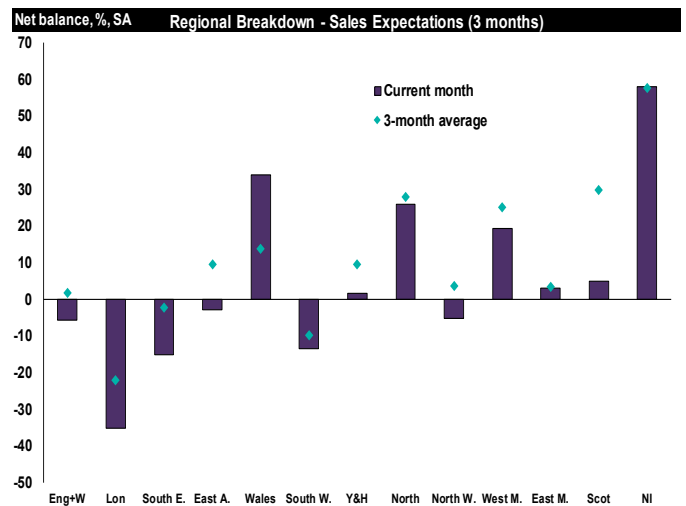
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

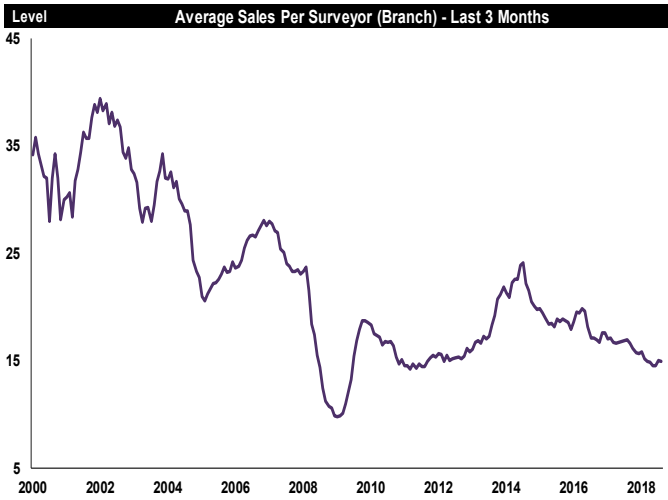


Regional Sales Expectations - Next three months

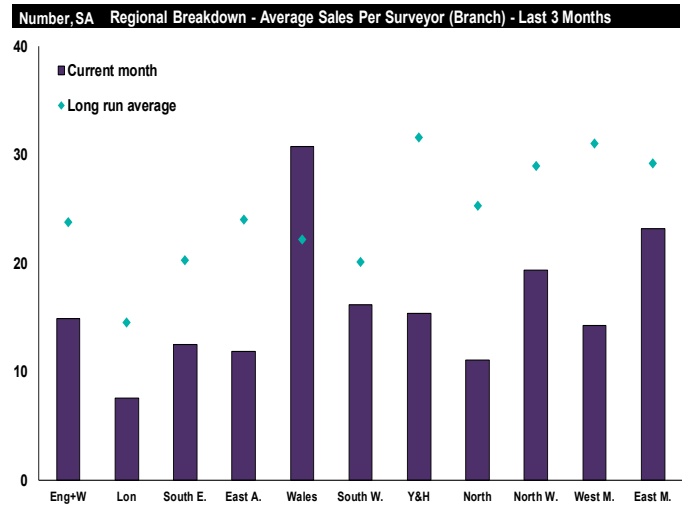


# Sales market charts

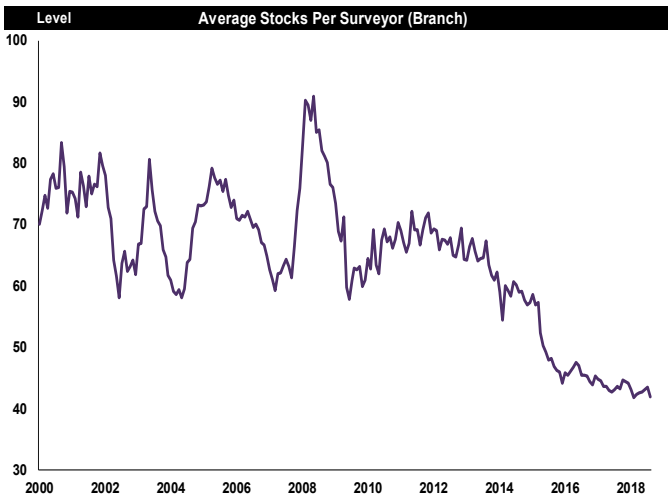
National Average Sales Per Surveyor - Past three months



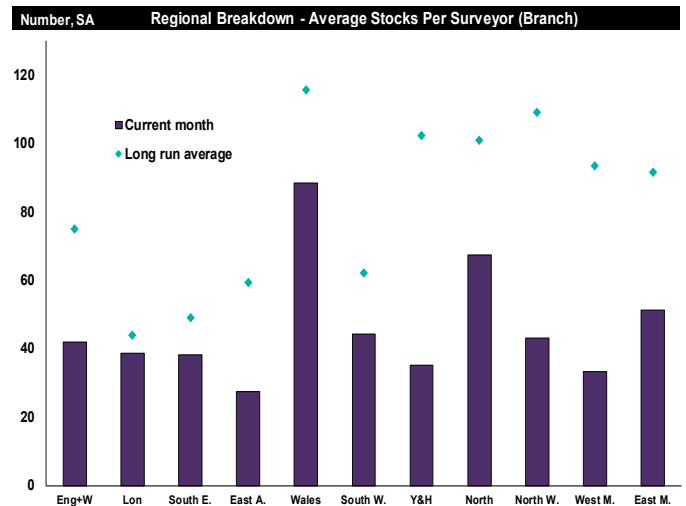
Regional Average Sales Per Surveyor - Past three months



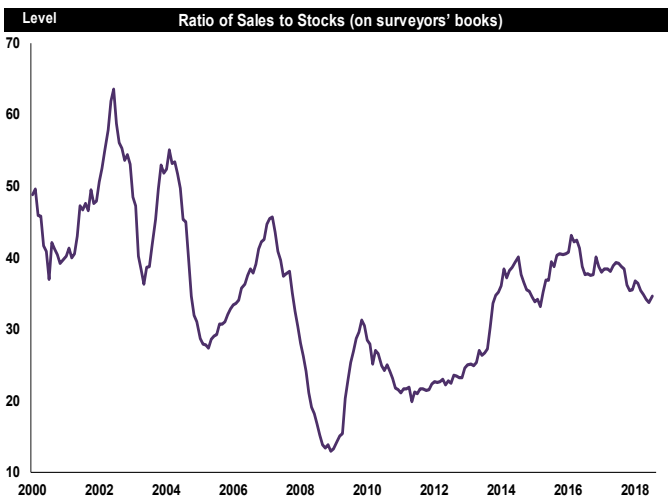
National Average Stocks Per Surveyor



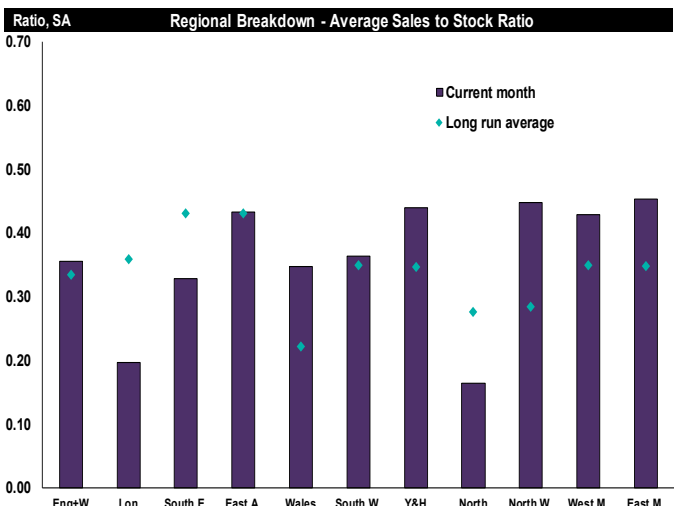
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

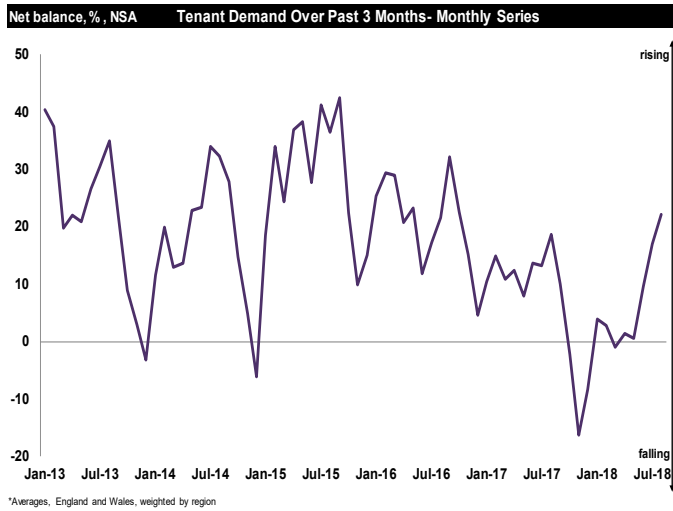


Regional Sales to Stock Ratio

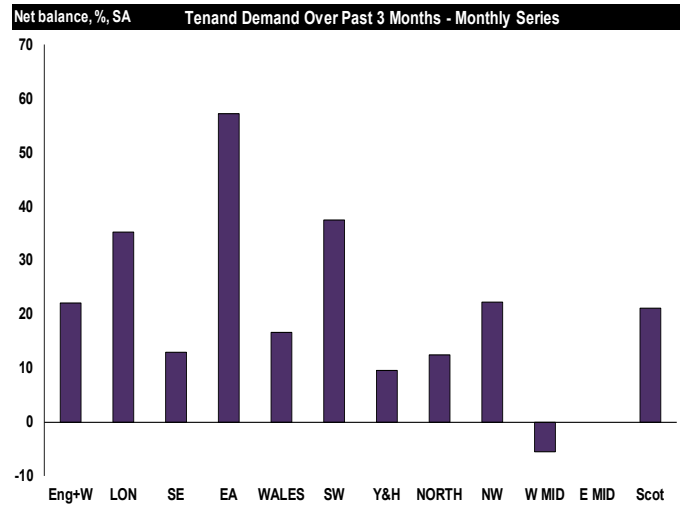


# Lettings market charts

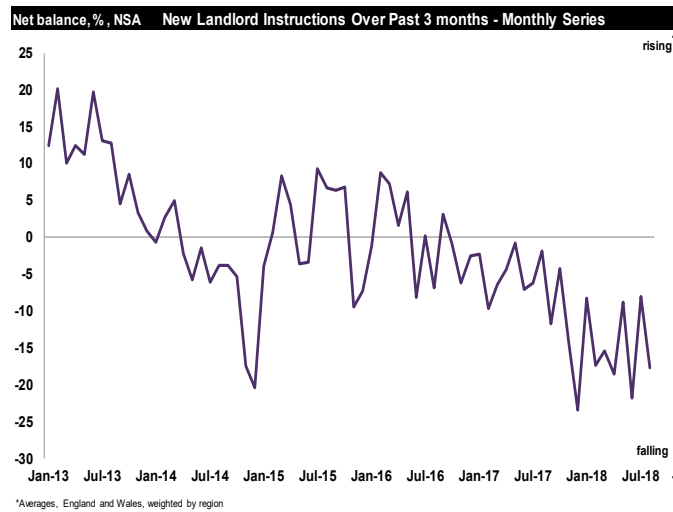
National Tenant Demand - Past three months



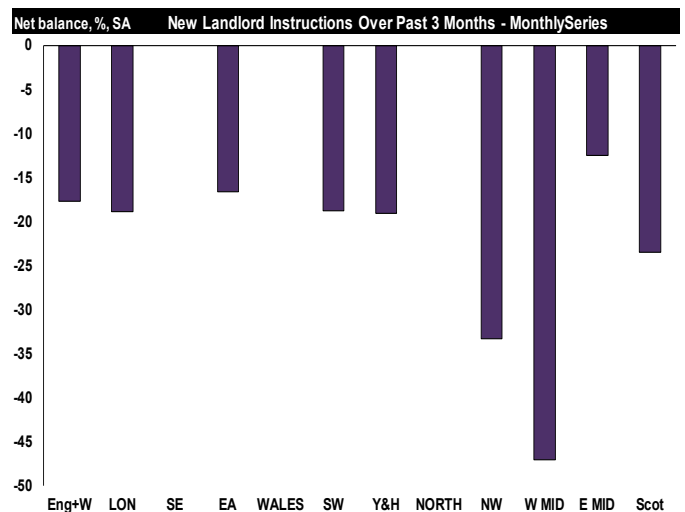
Regional Tenant Demand - Past three months



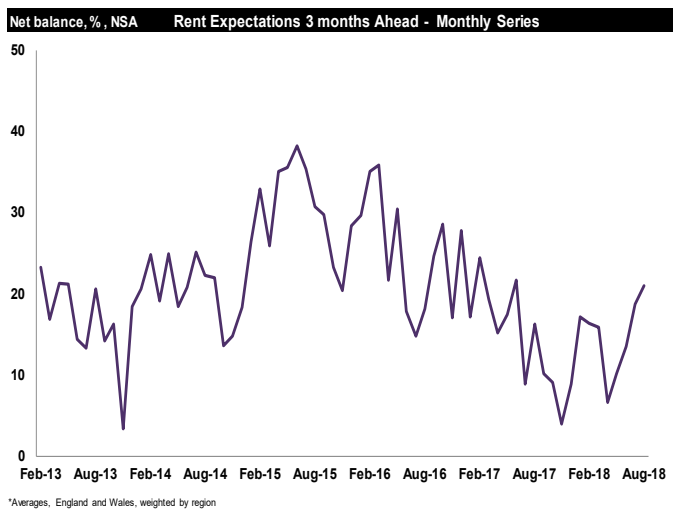
National New Landlord Instructions - Past three months



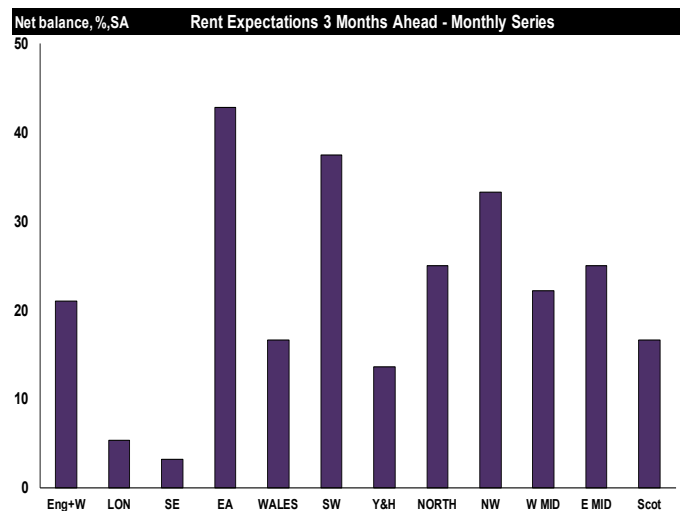
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

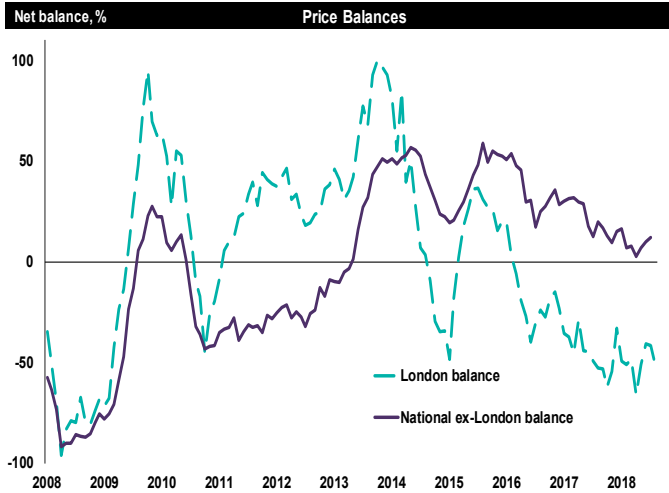


Regional Rent Expectations - Next three months

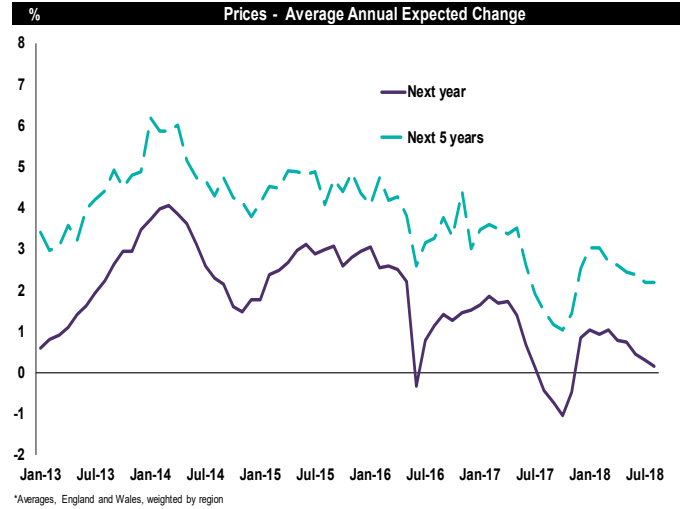


# Expectations & other data

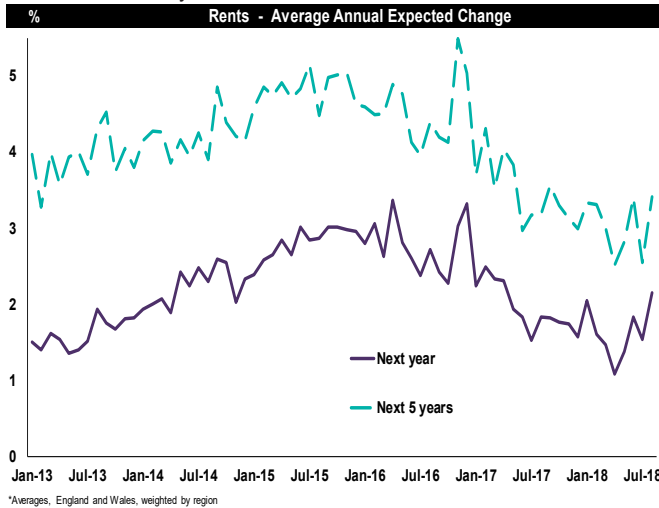
National Price Balance (excluding London) and London Price Balance - Past three months



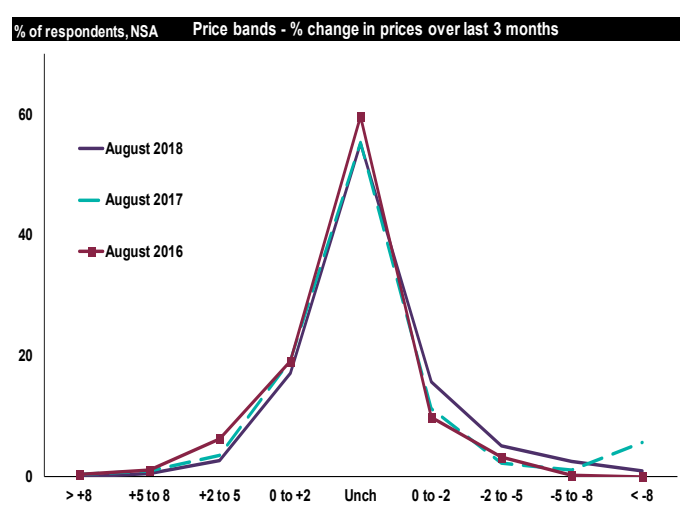
National Average Annual Expected Price Change (point estimate) - Next one and five years



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



Price Bands - Past three months



# Surveyor comments - sales

## North

Andrew Holmes, BSc (Hons) Dip Surv MRICS, Cumbria, Thomson Hayton Winkley Estate Agents, 01539 815700 - The market appears to be relatively stable at present within South Lakeland with good activity across the board.

Mr T H Brannen, FRICS, Coastal / Newcastle, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Sales figures are still strong and the market has picked up following the cessation of the early summer holidays.

Neil Foster, FRICS, Hexham, Foster Maddison Property Consultants, 01434 605441 - Lack of stock continues to inhibit activity. The over 60s market is most active but not in the traditional retirement sector. Housing supply generally is not matching demand.

Paul McSkimmings, BSc(Hons) MRICS, Newcastle upon Tyne, Edward Watson Associates, 0191 2812444, www.edwardwatson-assoc.com, paul@edwardwatson-assoc.com - Much busier than anticipated despite the school holidays. Expecting instructions to increase with buyers hoping to buy before Christmas.

Simon Bainbridge, MRICS, Darlington, Savills, 01325 370500, savills.co.uk, sbainbridge@savills.com - Generally a quiet month with school/annual holidays having an impact, but a busy September is anticipated.

## Yorkshire and Humberside

Alex McNeil, MRICS, Huddersfield, Bramleys, 01484 530361 - The market has continued to be robust through the summer months with values stable and currently sustainable levels of owner/occupier demand although there continues to be a shortage of new housing stock.

Alison Demaine- Grieve, MRICS, Ripon, Linley and Simpson Land and New Homes, 01765 690219, alison.grieve66@gmail.com - Summer holidays has reduced number of viewings but not the number of instructions. If anything, more than usual instructions received.

Ben Hudson, MRICS, York, Hudson Moody, 01904 650650, www.hudson-moody.com, benhudson@hudson-moody.com - Following a slower July ( World Cup / Good Weather ) a very busy August where buyers and sellers are catching up .

Christopher R Jowett, BSc MRICS, Huddersfield, Jowett Chartered Surveyors, 01484 536799, www.jowett-huddersfield.co.uk, chris@jowett-huddersfield.co.uk - Quieter August month because of school holidays. Nationwide suggesting that the market is slowing down. Best chance of a sale is in the first 2/3 weeks. We are achieving this in the majority.

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fsl.com - The market has continued to be busy throughout the school holidays.

David Pank, FRICS, Leeds and Wakefield, Manning Stainton, www.manningstainton.co.uk, dpank50@gmail.com - New instructions are up 12 % on last August and sales are up 10% giving us the best August since 2007.

I Adams, MRICS, East Riding of Yorkshire (Kingston upon Hull), Metropolis Surveyors, ianadams31@yahoo.co.uk - Strong demand for good quality family homes in the more popular districts and not enough for sale.

James Brown, MRICS, Richmond, Norman F Brown, 01748822473, normanfbrown.co.uk, belindandjames@hotmail.co.uk - With the uncertain Brexit looming, I can only see buyer caution becoming greater between now and next March

James Peacock, MRICS, Grimsby, Lovelle Bacons LLP, 01472 251918, j.peacock@lovelle-property.co.uk - High demand but low available stock.

John E Haigh, MRICS FAAV, Knarborough, Lister Haigh (Knarborough) Limited, 01423 860322, www.listerhaigh.co.uk, knarborough@listerhaigh.co.uk - Autumn awaits - September Boost ?

John reeves, FRICS, York, Helmsley group, 01904 682800, john-reeves@helmsley.co.uk - Market slowed for a while but seems to have picked up again.

Kenneth Bird, MRICS, Wetherby, Renton & Parr, 01937 582731, www.rentonandparr.co.uk, ken@rentonandparr.co.uk - Holidays had an impact on new instructions but strongest month this year so far on sales.

Kevin Smethurst, FRICS, Doncaster/Selby, Kevin C Smethurst, 07814831966, kcsmethurst@gmail.com - A slight improvement on last year but not yet reflected in increasing values.

M J Hunter, MRICS, Doncaster, Grice and Hunter, 01302 360141, www.grice hunter.co.uk, griceandhunter@btconnect.com - August has been slow and sales that have been completing were agreed several months ago. Surveys are also well down due to lack of available property on the market. September is always crucial, as any improvement rarely occurs after this cut off.

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - Quieter but steady sales market during the summer holiday period but this is fairly typical. The market is expected to pick up in September.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - For a few years, the autumn period has been the busiest part of the year - this year is the same but a little more subdued.

Simon Croft, Harrogate, Feather Smalles & Scales LLP, 01423 510211 - Not enough second-hand stock, plenty new build but they are being purchased by buyers from out of the area. Hence no secondhand sales (or limited!)

Timothy Usherwood, MRICS, Otley, Dacre, Son & Hartley, 01943 463321, www.dacres.co.uk, tju@dacres.co.uk - Otley is cheaper than surrounding areas but provides excellent facilities, this is certainly pulling families to the town.

## North West

David Kennerley, Congleton, Whittaker and Biggs, 01260 273241, david.kennerley@whittakerandbiggs.co.uk - Lots of New Build Sites in our area, this is having a negative effect on second hand property prices

Derek Coates, MRICS, Liverpool, Venmore, 0151 236 0301, www.venmores.co.uk, d.coates@venmores.co.uk - A quiet month but not unusual for the time of year. More worryingly, it is increasingly likely that the chaotic Brexit negotiations are beginning to impact the market.

Ian Macklin, FRICS, Altrincham, Cheshire, Ian Macklin & Compnay, 0161 980 8011, halebarns@ianmacklin.com - Stamp duty is affecting sales at higher prices i.e. over £1.5 million and the lack of confidence continues. Negative articles relating to property prices are also beginning to have an effect.

John Williams, FRICS, MEWI, Wirral, Brennan Ayre O'Neill LLP, 01513439060, www.b-a-o.com, john@b-a-o.com - Market held up well through the holiday season.

Michael Holden, FRICS, Lancashire, Michael Holden Chartered Surveyors, 01254 5505031, mjh@michaelholdenfrics.co.uk - Big differentials being noticed between asking price and comparable evidence - distortion of market by aggressive sales tactics from some agents.

Mr John Halman, MRICS, Wilmslow Cheshire, Gascoigne Halman, 01625 460 344, www.gascoignealman.co.uk, jane@gascoignealman.co.uk - August was quieter in 2018 than in the previous couple of years when it has benefited from either a post election or a post Brexit surge.



# Surveyor comments - sales

Richard Powell, FRICS, Oldham, Ryder & Dutton, 01619253232, www.ryder-dutton.co.uk, rpowell@ryder-dutton.co.uk - The general uncertainty in the economy is undoubtedly contributing to the lack of stock. The lack of stock, despite the lack of confidence generally, is leading to price increases.

Stephen Dodgson, BSc FRICS, Wirral, Rainfords Chartered Surveyors, 0800 612 7957, https://charteredurveyorsheshire.co.uk/, steve.dodgson@live.co.uk - Continuing strong market for the time of year.

## East Midlands

Chris Charlton, FRICS, Nottingham, Savills, 0115 9348020, www.savills.com, ccharlton@savills.com - A surprisingly busy summer but still a standoff between sellers and buyers on pricing. More realistically priced stock is required.

Christopher Shallice, FRICS FAAV, Holbeach, Hix & Son, 01406 422 777 - More activity and more sales were negotiated in spite of holidays and other distractions.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors., 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Marginal increase in new instructions, continued interest in well priced property. Upper end of market sticking.

David Hawke, FRICS, Nottinghamshire, David Hawke & Co, 01909 531450 - Maybe as expected - but still generally a very quiet month.

Mark Newton, FRICS, Grantham, Newton Fallowell, 01476 591900, www.newtonfallowell.co.uk, mark.newton@newtonfallowell.co.uk - A good month for exchanges. Sales too are up by 20% on 2017, setting up a good lazy quarter

Paul Perriam, BSc (Hons) MRICS, Nottingham, William H Brown/ Bagshaws Residential, 01332 542299, www.sequencehome.co.uk, paul.perriam@sequencehome.co.uk - Good level of sales despite the holiday period but instructions were slower throughout the month.

Quentin Jackson-Stops, FRICS, Northampton, Jackson-Stops, 01604 632991, www.jackson-stops.co.uk, quentin.jackson-stops@jackson-stops.co.uk - While August was quiet with respect to market appraisals and viewings, it was a strong month for contract exchanges. Brexit now looms over the property market and will, if no agreement is reached soon, affect sales going forward.

Steve Gadsby, BSc FRICS, Derby, Gadsby Nichols, , www.gadsbynichols.co.uk, stevegadsby@gadsbynichols.co.uk - Seasonal Holiday effect with reduced enquiry levels, new listings and sales. Prices seem to have stabilised but still uncertainty in market mainly due, in our opinion, to Brexit

Tim Yeomans, MRICS, Nottingham/Derby, SDL, 07795266361, tim.yeomans@sdlurveying.co.uk - Price growth in most areas. Higher in lower value and ex LA estates.

## West Midlands

Alex Smith, FRICS, Birmingham, Alex Smith&Co, 0121 784 6660, alex@alex-smith.co.uk - Typical August holidays and religious festivals affecting activity.

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - A quiet month but still a pleasing level of sales achieved. Requests for valuation appointments were down a little however. Still no real evidence of prices falling despite rumours that other parts of the UK are beginning to struggle.

J J Dell & Company, MRICS FAAV, Oswestry, J J Dell & Company, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - The market slowed down at end of July due to school holidays.

Jennifer Price, FRICS, Birmingham, Harrison Price Homes, Jennifer@harrisonpricehomes.co.uk - World Cup and heat wave appear to have stalled the market, properties are taking longer to sell this summer than expected.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Quieter month mainly due to the holiday season. There are signs more property will come available in the autumn.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - A relatively quiet month with less property coming for sale due to holiday season. Indications are that autumn will be busy.

John Andrews, FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Fewer new instructions and stock levels for time of the year. More properties needed to stimulate demand.

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - Less properties becoming available and enquiry levels are lower due to the holiday season. Assuming more property becomes available in the autumn, this will stimulate greater demand.

M. Cooper, FRICS, Coventry, Coopers, 024 7655 2841, mc@coopers-cov.com - Coventry area is still in good demand with quick reaction to new instructions and early viewings if priced within sensible limits. This is true across the range of property styles and price ranges.

Mark Wiggin, MRICS, Ludlow, Strutt and Parker, mark.wiggin@struttandparker.com - Vendors being more realistic. Plenty of purchasers but price aware.

Mike Arthan, FRICS, Shropshire, Barbers, m.arthan@barbers-online.co.uk - Busier August than expected but overall lack of property available for sale is suppressing sales activity.

R. R. Williams, FRICS, Hay-on-Wye, McCartneys LLP, 01497 820 778, www.mccartneys.co.uk, ryan@mccartneys.co.uk - Plenty of deals being done but fewer instructions, and concern over next springs economic outlook mean that it could be a quiet 6 months.

Richard Franklin, BSc (Hons) MRICS, Worcestershire, Franklin Gallimore, 01584 810436 - The inertia of Brexit and shambolic communication by government of the subject is dominating the market. If you are uncertain you do nothing hence market conditions.

Stephen Smith, MRICS, Walsall, Fraser Wood, 01922 629000 - Considerable interest in a few new instructions with asking prices that appear to be sensible, but this is creating multiple offers, due to the shortage of properties that are available.

## East Anglia

Chris Philpot, FRICS, Stowmarket, Lacy Scott and Knight, www.lsk.co.uk, cphilpot@lsk.co.uk - Although the hot weather held the market back a little, full activity has now resumed.

David H Knights, MRICS, Ipswich, David Brown & Co, 01473 222266, mail@davidbrown-ipswich.co.uk, www.davidbrown-ipswich.co.uk - A slow month for sales and new instructions mainly due to Brexit and the holiday season but there are early signs of renewed activity as schools open.

Jeffrey Hazel, FRICS, Norfolk, Geoffrey Collins & Co., 01553 774135 - Less activity during summer holidays but still quite active. We await the autumn business.

## Surveyor comments - sales

Mark Wood, MRICS, Cambridge, Carter Jonas, mark.wood@carterjonas.co.uk - Usual August. Market enquiries, market appraisals and listings all down on previous couple of months.

Nicholas Rudge, FRICS FAAV, Suffolk & Norfolk, Durrants, 01502 712122, nicholas.rudge@durrants.com - Summer holiday and bank holiday. Effect of Brexit.

Nigel Steele, FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - August has been the usual holiday month with low levels of activity but a good number of new properties to launch in September.

Rob Swiney, MRICS, Bury St Edmunds, Lacy Scott and Knight, 01284 748636, www.lsk.co.uk, rswiney@lsk.co.uk - Market has been busy for this time of year but pricing is key!

Tom Goodley, MRICS, Strutt & Parker, 01603 617431, struttandparker.com, tom.goodley@struttandparker.com - A very busy August and one of most successful in a long time. Stock levels are down but there are still some good buyers about.

### South East

Anthony Webb, FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - Excessive stamp duty continues to damage the market and stifle growth and activity, suppressing moving and mobility of labour.

Chris Clark, FRICS, Chandler's Ford, Eastleigh, Ely Langley Greig, 023 80274211, elgsurveyors.co.uk, chrisclark@elgsurveyors.co.uk - Erratic market at the moment - buyers are very cautious, but I detect a slight improvement in demand.

Christopher Sims, FRICS, Sevenoaks, Michael Rogers LLP, christopher.sims@michaelrogers.co.uk - Holiday period causing a slow down.

Craig Pilgrim, MRICS Reg Valuer FAAV, Hungerford, Pilgrim Bond, 01488 72911, craig@pilgrimbond.co.uk - Activity down due to Brexit concerns and holiday period.

David Boyden, MRICS, Colchester Head Office, Boydens, 01206 762244, www.boydens.co.uk, david.boyden@boydens.co.uk - Buyers in strong positions are in minority creating new chains waiting to complete the line. Keenly priced stock new to the market selling in the first week. Encouraging August.

David Nesbit, FRICS, Portsmouth, D.M.NESBIT & Company, 02392 864321, www.nesbits.co.uk, davidnesbit@nesbits.co.uk - An encouraging trend with instructions, but for how long? Accurate pricing is essential. Many top-end properties are overpriced.

David Parish, FRICS, Upminster, Gates Parish & Co, 01708 250033 - We have agreed a high level of sales during August which is unusual for a holiday month. There still remains a shortage of good quality instructions but this may improve in September;

Edward Rook, MRICS, Sevenoaks, Knight Frank, edward.rook@knightfrank.com - Market stalling through stamp duty.

Eoin Hill, MRICS, RG post codes, SDL Surveying, Eoin.hill@talk21.com - Uncertainties continue.

Hannah Bentley, MRICS, Richmond, Knight Frank, hannah.bentley@knightfrank.com - Been busy given its August which is normally quieter.

Ian Perry, FRICS, Faringdon Fairford lechlade Highworth Witney, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - The market in our area has been strong with good listings and sales

James Farrance, MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Residential sales market is suffering due to lack of demand for second hand properties. Plenty of 1 and 2 bedroom properties due to lack of buy to let investors that are being put off by government policy whilst help to buy is drawing buyers to new build.

John Frost, MRICS, Ashford, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Despite Bank Holiday (and holiday season generally) the market picked up a little in August, hopefully in readiness for a busy September!

John Frost, MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - HS2 has an impact in Chalfont. Otherwise solicitors and surveyors very cautious, not prepared to take a view, much more likely to advice their client to withdraw rather than run the risk of being sued!

John Lewis, MRICS, Essex, East of England Surveys, 01702 479399, www.eastofenglandsurveys.co.uk, john@eastofenglandsurveys.co.uk - The summer holidays have not seen the drop off in survey enquiries that we would expect.

Mark Everett, FRICS, Epsom, Michael Everett & Company, www.michael-everett.co.uk, markeverett@michael-everett.co.uk - Typically quiet August. All offices very slow and most valuations leading to September instructions. Hopefully the over-long summer recess is over and the market can pick up.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - August has seen a significant increase in vendor activity but it remains to be seen if buyer activity reacts to increasing availability.

Martin Lee, MRICS, Southend on Sea, Countrywide Surveyors, martin.lee@cwsurveyors.co.uk - Summer holidays.

Michael Brooker, Fellow, Crowborough East Sussex, Michael Brooker, 01892-663377, michael@michaelbrooker.co.uk - Hot weather and August led to a dull market. Price is King. Rapid sales if correctly priced. Brexit Cloud beginning to have an effect/influence. Concerned about next 6 months. Death/Divorce/Debt will carry on and sustain market!

Philip Hiatt, MRICS, East Grinstead, Your Move Philip Hiatt, 01342 321142, www.your-move.co.uk/eastgrinstead, philip.hiatt@your-move.co.uk - A tough market with vendors wanting what they perceive to be 2018 prices and buyers offering 2015/2016 prices.

Stephen Wolfenden, FRICS, Oxford, The county homesearch Company, www.county-homesearch.com, oxfordshire@county-homesearch.com - Media's Brexit speculation causing people to defer decision to move, plus many of my clients finding the 3% extra stamp duty on second homes prohibitive.

Tim Green, MRICS, South Oxfordshire, Green & Co, 01235 763562, www.greenand.co.uk, tim.green@greenand.co.uk - The August slowdown is harder to spot in current conditions. The reality is whether we see any discernable difference as we look optimistically to September and October.

Tony Jamieson, MRICS, Guildford, Clarke Gammon Wellers, 01483 880900, www.clarkegammon.co.uk, Tony.jamieson@clarkegammon.co.uk - It is now a buyers market with only the correctly priced properties selling.

# Surveyor comments - sales

## South West

Christopher Bailey, MRICS, Exeter, Knight Frank, christopher.bailey@knightfrank.com - We have experienced an above average level of activity throughout the summer period with more sales, instructions, viewings and average sale prices compared to last summer. No discernible effect from Brexit concerns just yet.

David Lewis, Bsc hons, West Devon and East Cornwall, Stags, 01752 223933, www.stags.co.uk, d.lewis@stags.co.uk - Continued political and economic uncertainty endures dampening transaction levels.

David McKillop, FRICS, Salisbury, McKillop and Gregory, dm@mckillopandgregory.co.uk - A very good month for valuations and instructions. Sales fair and exchanges coming through. Much better than expected.

David Robinson, AssocRICS, North Cornwall, Stags, d.robinson@stags.co.uk - Combination of increase in buyers who are actually proceedable and vendors softening their stance on sale price has created a flurry of agreed sales. Potential of a tangible Brexit deal has made people think more about selling and buying.

G C Thorne, FRICS, Poole and East Dorset, Thornes, 01202-684004, www.thornes.org.uk, graham@thornes.org.uk - The market continues to tighten with sales levels dropping due to an acute shortage of new instructions.

Ian Perry, FRICS, Cheltenham Cirencester Nailsworth Tetbury Stroud, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - The market in our area has been strong with good listings and sales.

James McKillop, MRICS, South West, Knight Frank LLP, james.mckillop@knightfrank.com - One word. Pricing. Get it wrong and it doesn't matter how good a brochure is. Justifiable guide pricing is critical.

James Wilson, MRICS, Shaftesbury, Jackson -stops, 01747 850858, jackson-stops.co.uk, james.wilson@jackson-stops.co.uk - More new instructions are coming to the market, pricing remains critical.

Jeff Cole, MRICS, Wadebridge, Cole Rayment & White, 01208813595, www.crw.co.uk, jeff.cole@crw.co.uk - We have had quite a positive August in terms of agreed sales following a good July.

Jeremy Priestley, FRICS, Poole, Berkeleys, 01202 708383, www.berkeleys.com, jeremy.priestley@yogroup.co.uk - Although there has been a significant increase in sales over the last month, there is a general lack of momentum across buyers; many viewings, very few offers. SDLT penalties and, to a lesser extent Brexit, are the factors.

John Corben, FRICS FCABE, Swanage, Corbens, 01929 422284, corbens.co.uk, john@corbens.co.uk - The market remains subdued. The biggest issue is the inordinate delay from agreeing sales to exchange of contracts.

Julian Bunkall, FRICS, Dorset, Jackson-Stops & Staff, 07970 872974 - The middle range markets i.e. £400K to £900K remains strong but the upper end £1 million is difficult, almost stagnated. Uncertainty with Brexit and the world economy continues to affect the market.

Lloyd Smale, FRICS, Devon, Drew Pearce, 01392 201748 - The key to new activity and interest from prospective buyers remains an increase in supply - new instructions attract fresh interest.

Mark Annett, FRICS, Gloucestershire, Mark Annett & Company, 01386 841622 - A busy time and provided a property is not overpriced, it sells well. We've had a couple of competitive bidding situations driving price up!

Mark Lewis, FRICS, Dorset, Symonds & Sampson, mlewis@symondsandampson.co.uk - We have seen Humberts close their local offices which has brought many of their properties to us but generally it is a typical August. Motivated buyers are about but waiting to see what stock comes forward in September.

Matthew Harvey, MRICS, Cotswolds, Tayler & Fletcher, 01451820913, taylerandfletcher.co.uk, matthew.harvey@taylerandfletcher.co.uk - A significant and substantial improvement in properties finally exchanging contracts and stronger supply and demand as buyers look to capitalise on some very good long term fixed mortgage rates.

OF Miles, FRICS, Swanage, Oliver Miles, 01929 426655, www.olivermiles.co.uk, olivermiles@olivermiles.co.uk - Market remains fragile and buyers withdrawing more readily.

Phillippa Stubbs, Assoc RICS, Tavistock, Stags, 01822 612458, www.stags.co.uk, p.stubbs@stags.co.uk - School holidays and the recent good weather has certainly decreased viewings and sales.

Robert Cooney, FRICS, Taunton, Robert Cooney Chartered Surveyors & Estate Agents, 01823 230230, robertcooney.co.uk, taunton@robertcooney.co.uk - Headline activity levels down - MAs and Viewings - due to final holidays etc before schools return plus bank holiday in the mix. Cancelled sales slightly higher than usual too with more vendors unable to progress onwards.

Roger Punch, FRICS, Plymouth, Marchand Petit, 01752 873311, www.marchandpetit.co.uk, roger.punch@marchandpetit.co.uk - The heat wave brought positive behaviour with it, but it will only be once we are into the autumn before we see the potentially negative effect of the interest rate rise and the continued effect of Brexit.

Simon Barker, MRICS, Sherborne, Knight Frank LLP, simon.barker@knightfrank.com - The Brexit / political issues in GB still makes buyers cautious and there is no idea how long this will last. Lack of London buyers is still a problem.

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - August was an incredibly good month, more sales, our best August for over 10 years. Indeed, the second best month of 2018. There is also a lot more on the market so there is plenty of choice for buyers. Expecting a busy September as well.

## Wales

Andrew Morgan, FRICS FAAV, Lampeter, Morgan and Davies, 01570423623, morgananddavies.co.uk, lampeter@morgannaddavies.co.uk - Positiveness, still underpinned by lifestyle appeal of our region. Stamp duty certainly a 'brake' on value growth.

Anthony Filice, FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - During August, fewer viewings of properties, but those that have taken place are more serious and sales are being agreed. New instructions were stronger early in the month, but should return in numbers, in September.

David James, FRICS, Brecon, James Dean, 01874 624757, jamesdean.co.uk, david@jamesdean.co.uk - August has been busy with appraisals and viewings but sales agreed are down.

Paul Lucas, FRICS, Haverfordwest, R.K. Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - Activity remains brisk. Some mortgage lenders have tightened their policies significantly which is detrimentally affecting the market.

Roger Davies, MRICS, Cardigan, J J Morris, 01239 612 343 - Decline in new instructions during the holiday season.

# Surveyor comments - sales

## London

Allan Fuller, FRICS, Putney, Allan Fuller Estate Agents, 020 8788 8822, allanfuller.co.uk, allan@allanfuller.co.uk - Estate Agents are good at finding excuses but during the recent extreme hot weather, enquiry levels and therefore sales slowed considerably, we have seen both a pick up in the last couple of weeks and anticipate more activity in September.

Allison Steele, AssocRICS, London and Home Counties, Regent Property, 020 87439101, www.regent-property.com, allimsteele@gmail.com - We are experiencing a busy August.

Ben Temple, MRICS, London, Regent Property, 02087439101, www.regent-property.com, ben@regent-property.com - The sales market has improved in the last month because sellers are being more realistic with prices.

Christopher Ames, MRICS, Belgravia/London, Ames Belgravia, 02077301155, amesbelgravia.co.uk, ca@amesbelgravia.co.uk - Vendors/purchasers having to accept that SDLT is unlikely to change. A few are keen to up-size/down-size or first time buy before the end of the year. Others with less urgency to move are waiting to see if things will change post-Brexit.

J.J.KING, FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Busy sales month for August with the number of deals agreed up. Driven by price reductions. Enquiry levels are tailing off as stock levels dip.

J.J.KING, FRICS, Merton LB, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Price reductions have helped secure a greater number of sales as vendors realise the market is not moving upwards. Stock levels remain a worry but we are expecting a more realistic approach by vendors on offers received during the remaining quarter.

James Gubbins, MRICS, Pimlico, Dauntons, 020 7834 8000, www.dauntons.co.uk, mail@dauntons.co.uk - The summer period has been noticeably quieter than the historical seasonal norm. Media reports of a declining London market have put buyers on edge as to whether now is the right time to buy.

James Perris, MRICS, London, De Villiers Chartered Surveyors, 02078876009, www.devilliers-surveyors.co.uk, james.perris@devilliers-surveyors.co.uk - Market remains subdued across almost all capital tiers of the market. This situation is unlikely to change unless some of the punitive transactional taxes are rescinded.

Jeffrey Doble, Teddington, Thamesview (Incl. Dexters Estate Agents), 020 8614 1205 - Very busy across all price ranges.

Jeremy Epton, MRICS, London, Youhome, 02079089282, www.youhome.co.uk, jerry.epton@youhome.co.uk - Vendors continue to ignore uncertainty created by Brexit in valuing their own asset, or understand uncertainty but not apply it sufficiently to their own asset.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - Once again, we are seeing a relatively good number of viewings but finding it hard to generate commitment. Less demand from investors too means less pressure on buyers and transactions are taking longer.

Joanna Fabikun, MRICS, London, Rogba Orinmalade & Co, jojolar@me.com - Political Uncertainty, Low Purchasing Power, Millennials not being able to get on the property ladder.

Mr B K Bhalla, MRICS, HI, CEA, Hounslow, Acrewoods Chartered Surveyors, 02085775733, www.acrewoods.com, enquiries@acrewoods.com - There is a lot of uncertainty within the market. Buyers looking to new builds rather than older properties.

Richard Ashaye, MRICS, London, Slough Borough Council, tokash38@hotmail.com - Timing of public holidays

Richard Taylor, MRICS, London, London's Surveyors and Valuers Ltd, Richard@lcsv.co.uk - Weakness remains in the market, fuelled by continuing economic uncertainty and the expected summer slowdown.

Robert Green, MRICS, Chelsea, John D Wood & Co., 020 7352 1484 - August saw the usual summer slowdown, with few active buyers compared to the busy previous three months. Websites enjoyed good traffic indicating demand is there, and we look forward to a busier autumn.

Robert King, Teddington, Jackson-Stops & Staff, 020 8943 9777 - School holidays - August tends to be the most popular month to go away across both departments.

Simon Aldous, MRICS, London, Savills, 02070163861, Savills.co.uk, saldous@savills.com - August is of course a quiet month, this month has been quieter than August 2017, but transaction levels remain surprisingly strong across many offices.

Terry Osborne, FRICS, SW1, Tuckerman Residential Ltd, 020 7222 5510, tosbome123@yahoo.com - Brexit

Tom Dogger, MRICS, London, B N Investment Ltd, 020 7590 9055, www.bakken Neptune.com, tdogger@bninvestment.co.uk - With rental prices increasing due to Landlords starting to exit the market, this could help stabilize prices.

William Delaney, AssocRICS, City of London, Lawrence Ward & Co, 02073379600, lawrenceward.co.uk, w.delaney@lawrenceward.co.uk - The summer holidays are over but market confidence continues to be constrained by on-going political and economic uncertainty. Some clients who are based outside the UK have reviewed their plans to sell as the exchange rate is unfavourable.

## Scotland

Adrian Stott, FRICS, Lothians, J and E Shepherd, 01316533456, shepherd.co.uk, musselburgh@shepherd.co.uk - Sales prices now routinely exceed home report values.

Alex Inglis, MRICS, Scottish Borders, Galbraith, 01573 224 244, galbraithgroup.com, alex.inglis@galbraithgroup.com - The market is busier again after a slightly quieter summer holiday period. Pretty traditional cottages in good rural locations within the Borders are proving to be particularly popular.

Craig Henderson, MRICS, Ayrshire, Graham & Sibbald, 01292 271030, www.g-s.co.uk, craig.henderson@g-s.co.uk - The market continues to improve across Ayrshire, with improved sales prices being achieved in many locations. Demand levels remain strong, but there still appears to be few sellers coming to market to satisfy the demand in many areas.

David Cruickshank, MRICS, Elgin, D M Hall, 01343 v548 501, david.cruickshank@dmhall.co.uk - Property selling well at valuation. Limited dip in the market for sales over the holidays, but the usual seasonal decrease in the number of new sales listings due to the holidays.

Graeme Lusk, BSc MRICS, Glasgow and Renfrewshire, Walker Fraser Steele, 01412480038, www.walkerfrasersteele.co.uk, graeme.lusk@walkerfrasersteele.co.uk - Still a strong buyers market in popular locations as a lack of stock coming to the market, is maintaining strong sales prices.

Graham Tonner, MRICS, Dundee, Graham + Sibbald, 01382 200064, gtonner@g-s.co.uk - August traditionally slows down the market due to the holiday period. This appears to be the case again in 2018 although demand to purchase still outstrips supply.

## Surveyor comments - sales

Grant Robertson, MRICS, Glasgow, Allied Surveyors, 0141 330 9950 - Sluggish summer with the market taking stock of recent price rises and increase in interest rates. Strong autumn looks likely.

Greg Davidson, MRICS, Perth, Graham + Sibbald, 01738445733, www.g-s.co.uk, g davidson@g-s.co.uk - The market in Perthshire has performed reasonably well this year and properties are now selling although higher value country properties are selling at a slower rate than the peak of the market.

Ian J Fergusson BSc, FRICS, Stirling, J&E Shepherd, 01786450438, www.shepherd.co.uk, ian.fergusson@shepherd.co.uk - Limited stock, hot summer and Brexit on the horizon leading to a sellers market in autumn 2018 with stock levels low.

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - The autumn sales market has picked up slightly compared to summer months but there is a lack of properties coming to the market. Closing dates for offers are popular at the moment.

John Brown, FRICS, Edinburgh, John Brown and Company, 07768583919, Jb-uk.com, John.brown@jb-uk.com - Edinburgh has less property for sale, market demand is more than supply, prices increasing. Peripheral property takes longer to sell and is sensitive to price quoted. Top end sellers are often choosing to sell privately.

K Bowman, Highlands, Torrances, kjb@torrance-partnership.co.uk - Very mixed sales, some on at higher end, few forced sales where second home stamp duty/ tax effecting sellers who want to get rid of houses to avoid tax and taking a lesser hit that way.

Kevin Hay, BSc MRICS, Ayrshire, Allied Surveyors, 01292 266381 - There is an increase in the number of properties being exposed to the market which are selling well. A number of which are achieving sales prices in excess of Home Report values.

Kevin MacDonald, MRICS, Inverness, Graham + Sibbald, 01463 236977, www.g-s.co.uk, kmacdonald@g-s.co.uk - Ongoing activity remains buoyant with late Summer sellers now coming to the market. Sales are being achieved in good time at or above valuation levels and new build schemes in Inverness are also reporting good take-up.

Marion Currie, AssocRICS, RICS Registered Valuer, Dumfries & Galloway, Galbraith, 01556 505346, www.galbraithgroup.com, marion.currie@galbraithgroup.com - Instructions are beginning to tail off from the spring/summer uplift, but sales continue with no drop off in interest from well-placed buyers.

Paul Taylor, MRICS, Scotland, J & E Shepherd, 01382 200454 - Lack of stock and confidence.

Peter Drennan, B.Sc. MRICS, Edinburgh, Allied Surveyors Scotland, 0131 226 6518, peter.drennan@alliedsurveyorsscotland.com - Relatively quiet July and August after a hectic Feb - May. Activity levels down, though prices achieved seem to be holding up. Somewhat surprisingly, prime sector seems to be doing rather well. Next spring - who knows what will happen?

Richard A Clowes, MRICS, Scottish Borders, DM Hall LLP, 01896 752009, www.dmall.co.uk, richard.clowes@dmhall.co.uk - Moving into the Autumn market, following a busier than expected summer period, sellers appear to be gearing up to put their homes on the market. External economic factors and a potential "No Deal" Brexit could impact confidence in the market place.

Tom Murray, AssocRICS and RICS Registered Valuer, Ayrshire, Galloway & Ayrshire Properties, 01465 713498, www.gapinthemarket.com, tom.murray@gapinthemarket.com - August turned out to be as busy a month as June and July had both been. New instructions kept the market engaged and the continued good weather brought applicants out and about to view property.

Tony Perriam, MRICS, Scottish Borders, Rettie Borders LLP, 01896 824070, www.rettie.co.uk, tony@rettie.co.uk - Activity levels are ahead of Summer 2017 despite Brexit anxiety amongst Southern UK buyers, although actual transactions are focused below £750,000.

### Northern Ireland

Daniel Mc Leron, FRICS, Omagh, Co. Tyrone, Mc Leron Estate Agents, 02882 242772, www.mclernonestateagents.com, info@mclernonestateagents.com - Enquiries and sales are marginally up since the summer holidays.

Eoin Lawless FRICS, FRICS, Newry, Eoin Lawless Estate Agents, info@lawlessestateagent.co.uk - Activity in the market should increase after the holiday period. There are still many obstacles between Sale Agreed and Completion.

Gareth Gibson, FRICS, Belfast, Douglas Huston, 02890683711, www.douglashuston.com, gareth@hustonestateagents.com - Supply levels continue to drop with sales being agreed. We hope September will see more new sales instructions.

Kirby O'Connor, AssocRics, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - The sales market has been strong, good appetite for investment. Even though we have come through holiday period, valuations and interest has sustained. Not enough on the market.

Samuel Dickey, MRICS, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - The market moves into the autumn with momentum and high demand.

Thomas Baird, MRICS, Glasgow, Select Surveyors Ltd, 0141 632 6589, www.selectsurveyors.co.uk, reception@selectsurveyors.co.uk - Home report instructions remain steady for the summer months with certain areas achieving above market value sales due to lack of stock.

# Surveyor comments - lettings

## North

Mr T H Brannen, FRICS, Coastal / Newcastle, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Supply has decreased whilst demand remains strong - for all properties (especially family 3 bed+).

Neil Foster, FRICS, Hexham, Foster Maddison Property Consultants, 01434 605441 - A dearth of good sized private rented homes is driving rent inflation. Against the odds of the market in general, and, to the detriment of long term tenants.

Richard Towler, MRICS, Penrith, Eden Lettings & Management, enquiries@edenletting.co.uk - Anything properly presented and priced is letting readily, reflecting the supply/demand imbalance, but regulatory and tax pressures on the sector and, latterly, EPC restrictions are still causing landlords to sell.

## Yorkshire and Humberside

Alex McNeil, MRICS, Huddersfield, Bramleys, 01484 530361 - Tenant demand remains strong and multiple applications are common for the superior properties as average terms continue to become extended.

Ben Hudson, MRICS, York, Hudson Moody, 01904 650650, www.hudson-moody.com, benhudson@hudson-moody.com - Lack of stock and strong demand keeping rents high .

Christopher R Jowett, BSc MRICS, Huddersfield, Jowett Chartered Surveyors, 01484 536799, www.jowett-huddersfield.co.uk, chris@jowett-huddersfield.co.uk - Students are choosier these days. Not like it used to be!!!

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fslea.com - Lettings market is still very strong

I Adams, MRICS, East Riding of Yorkshire (Kingston upon Hull), Metropolis Surveyors, ianadams31@yahoo.co.uk - Still marginal increases in Eastern European demand, and mainstream local families' property lets are stable.

James Peacock, MRICS, Grimsby, Lovelle Bacons LLP, 01472 251918, j.peacock@lovelle-property.co.uk - Slight dip due to Universal Credit.

John Reeves, FRICS, York, Helmsley group, 01904 682800, john-reeves@helmsley.co.uk - Hot, too little stock, too much demand.

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - No real changes. Steady demand for good quality properties at realistic rentals.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - Whilst the lettings market is not basically affected in the same way as sales - the onset of the 'Christmas effect' does limit the market activity.

Simon Croft, Harrogate, Feather Smailes & Scales LLP, 01423 510211 - Lack of investors due to tax and stamp duty hikes causing increase in supply of 1 + 2 bed apartments. Brexit has led to Europeans leaving who could have taken these properties. Rents therefore falling and investment is not as attractive.

## North West

Mr John Halman, MRICS, Wilmslow Cheshire, Gascoigne Halman, 01625 460 344, www.gascoignealman.co.uk, jane@gascoignealman.co.uk - We have seen an increase in applicants and viewings, therefore rents are being agreed at higher rates, stock is stable but landlords are looking to cut costs.

Richard Powell, FRICS, Oldham, Ryder & Dutton, 01619253232, www.ryder-dutton.co.uk, rpowell@ryder-dutton.co.uk - There is an obvious move by Landlords to move out of the buy to let market. The number of properties available is falling as a result.

## East Midlands

Christopher Shallice, FRICS FAAV, Holbeach, Hix & Son, 01406 422 777 - Good demand but applications of variable quality.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors., 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Lack of supply of good quality stock indicates a buoyant market with tenant demand still very good.

John Chappell, BSc(Hons), MRICS, Skegness, Chappell Co Surveyors Ltd, 01754 769673, www.skegnesssurveyors.co.uk, john@chappellandcosurveyors.co.uk@ - Several smaller Landlords looking at selling to get out of buy to let scenario.

Nicholas Richardson, FRICS, Beeston, Nottingham, Nicholas Richardsons, 01159677589, www.nicric.co.uk, nrichardson@nicric.co.uk - Nottingham City Council have imposed Selective Licensing at £780 on 32,000 Lets! Landlords Selling up! We should see less lets and higher rents! Is this progress?

## West Midlands

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - A quiet month on the whole. Still perhaps a shortage of new stock to let.

Dean Taylor, MRICS, Harborne/ Birmingham, JPTaylor, 0121 4284443, www.jptaylor.co.uk, dean@jptaylor.co.uk - Busy with tenant enquiries but still a lack of property supply.

J J Dell & Company, MRICS FAAV, Oswestry, J J Dell & Company, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - Tenants appear to be staying put.

Jennifer Price, FRICS, Birmingham, Harrison Price Homes, Jennifer@harrisonpricehomes.co.uk - Tenant demand picking up over the summer as expected.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - No real change in either availability of rented properties or volume of applicants. Property availability remains at a low level and applicants levels are high.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - Still steady and constant demand for all types of rented property. Plenty of flats available which meet demand. More houses needed to let.

John Andrews, FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - A steady and constant market for all types of rented properties. Family houses particularly in demand and unless more become available, rents may increase.

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - A similar market with regard to supply and demand as seen earlier this year, but slightly less activity due to holiday season.

M. Cooper, FRICS, Coventry, Coopers, 024 7655 2841, mc@coopers-cov.com - Taxation increases and Government measures are beginning to slow demand from the amateur buy to let investors.

Mike Arthan, FRICS, Shropshire, Barbers, m.arthan@barbers-online.co.uk - Still a good balanced local lettings market place. Rents nudging upwards in some areas, but market is price sensitive.

# Surveyor comments - lettings

Nicholas Lamb, MRICS, Birmingham, Naismiths, 0121 262 3450, [www.naismiths.com](http://www.naismiths.com), [nicholas.lamb@naismiths.com](mailto:nicholas.lamb@naismiths.com) - More quality well managed family housing stock is required to meet increasing demand in this sector. Lower grade, poorly managed stock is not moving.

R. R. Williams, FRICS, Hay-on-Wye, McCartneys LLP, 01497 820 778, [www.mccartneys.co.uk](http://www.mccartneys.co.uk), [ryan@mccartneys.co.uk](mailto:ryan@mccartneys.co.uk) - Steady demand and supply although stamp duty changes and increased regulation make landlords more circumspect.

Richard Franklin, BSc (Hons) MRICS, Worcestershire, Franklin Gallimore, 01584 810436 - Tenants are staying put, low levels of churn. Some amateur landlords now selling given change of tax environment for BTL.

## East Anglia

Andrew Pearce, MRICS, Wolverhampton, Millennium Properties, 01902 836036 - Huge shortfall of supply due to prohibiting taxation laws has seen rents rise drastically as demand for property is outstripping supply. More landlords will sell as fees rise once tenants' fees are abolished, the long term outlook for tenants is bleak

Chris Philpot, FRICS, Stowmarket, Lacy Scott and Knight, [www.lsk.co.uk](http://www.lsk.co.uk), [cphilpot@lsk.co.uk](mailto:cphilpot@lsk.co.uk) - Still strong demand.

Jeffrey Hazel, FRICS, Norfolk, Geoffrey Collins & Co., 01553 774135 - Steady supply and demand.

Nigel Steele, FRICS, Norfolk, Jackson-Stops, 01603 612333, [www.jackson-stops.co.uk](http://www.jackson-stops.co.uk), [nigel.steele@jackson-stops.co.uk](mailto:nigel.steele@jackson-stops.co.uk) - Good demand, shortage of quality stock

## South East

Anthony Webb, FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, [www.trenchard-arlidge.co.uk](http://www.trenchard-arlidge.co.uk), [twebb@trenchard-arlidge.co.uk](mailto:twebb@trenchard-arlidge.co.uk) - Rents are level but landlords need to ensure properties are in good order to attract tenants who have a choice.

Christopher Sims, FRICS, Sevenoaks, Michael Rogers LLP, [christopher.sims@michaelrogers.co.uk](mailto:christopher.sims@michaelrogers.co.uk) - Holiday period causing a slow down.

David Boyden, MRICS, Colchester Head Office, Boydens, 01206 762244, [www.boydens.co.uk](http://www.boydens.co.uk), [david.boyden@boydens.co.uk](mailto:david.boyden@boydens.co.uk) - A Third of August landlords are new to letting which is a good sign. Deals up on July and 50% up on August 2017, so very pleasing.

David Parish, FRICS, Upminster, Gates Parish & Co, 01708 250033 - The market is fairly steady at present. Demand is beginning to increase. Landlords are beginning to become concerned about excessive government interference in the market and burdensome regulation.

Eoin Hill, MRICS, RG post codes, SDL Surveying, Eoin, [hill@talk21.com](mailto:hill@talk21.com) - Shrinking buy to let market

James Farrance, MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, [www.braxtons.co.uk](http://www.braxtons.co.uk), [jfarrance@braxtons.co.uk](mailto:jfarrance@braxtons.co.uk) - Available stock levels are reducing having an upward pressure on rents.

John Frost, MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, [frostweb.co.uk](http://frostweb.co.uk), [beaconsfield@frostsurveyors.co.uk](mailto:beaconsfield@frostsurveyors.co.uk) - Very low buy to let stock.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, [www.elgars.uk.com](http://www.elgars.uk.com), [m.allen@elgars.uk.com](mailto:m.allen@elgars.uk.com) - Once again a holiday period that we expected to be quiet has been extremely busy with all properties being let except one let being agreed by the end of the month.

Michael Brooker, Fellow, Crowborough East Sussex, Michael Brooker, 01892-663377, [michael@michaelbrooker.co.uk](mailto:michael@michaelbrooker.co.uk) - Steady.

Stephen Wolfenden, FRICS, Oxford, The county homeseach Company, [www.county-homeseach.com](http://www.county-homeseach.com), [oxfordshire@county-homeseach.com](http://oxfordshire@county-homeseach.com) - Most moves currently departures

Stuart Gray, MRICS FAAV, St Albans, Strutt & Parker, 01727 738280, [www.struttandparker.com](http://www.struttandparker.com), [stuart.gray@struttandparker.com](mailto:stuart.gray@struttandparker.com) - Demand has remained consistent during the often quiet summer months.

Tony Jamieson, MRICS, Guildford, Clarke Gammon Wellers, 01483 880900, [www.clarkegammon.co.uk](http://www.clarkegammon.co.uk), Tony, [jamieson@clarkegammon.co.uk](mailto:jamieson@clarkegammon.co.uk) - More lets available and fewer tenants so rents may have to come down.

## South West

Mark Annett, FRICS, Gloucestershire, Mark Annett & Company, 01386 841622 - Another busy time and supply and demand at work. Still not enough supply to meet demand.

Mark Lewis, FRICS, Dorset, Symonds & Sampson, [mlewis@symondsandsampson.co.uk](mailto:mlewis@symondsandsampson.co.uk) - Tenant demand is close to record highs as the stamp duty bites into buy to let investors. Rents are increasing as a result.

Matthew Harvey, MRICS, Cotswolds, Tayler & Fletcher, 01451820913, [taylerandfletcher.co.uk](mailto:taylerandfletcher.co.uk), [matthew.harvey@taylerandfletcher.co.uk](mailto:matthew.harvey@taylerandfletcher.co.uk) - Slightly lower demand is balanced by a reduction in supply so rents remain solid.

Paul Oughton, MARLA, MNAEA, Cirencester and Cotswolds, Moore Allen & Innocent, 01285648118, [www.mooreallen.co.uk](http://www.mooreallen.co.uk), [paul.oughton@mooreallen.co.uk](mailto:paul.oughton@mooreallen.co.uk) - Tenant demand picking up but supply dropping as some existing landlord exit and fewer new landlords entering the sector.

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, [stags.co.uk](http://stags.co.uk), [s.cooper@stags.co.uk](mailto:s.cooper@stags.co.uk) - August was busy and lots of properties changing hands, new tenants moving into the area and a few landlords selling up which will push rents up. Plenty of demand for properties to let and not enough supply, particularly in Exeter

## Wales

Anthony Filice, FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, [www.kelvinfrancis.com](http://www.kelvinfrancis.com), [tony@kelvinfrancis.com](mailto:tony@kelvinfrancis.com) - Some Landlords are going out of the market with fewer coming into it. Rents are likely to rise. There are plenty of potential tenants but being on DSS and having pets limits their choices.

Paul Lucas, FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, [www.rklucas.co.uk](http://www.rklucas.co.uk), [paul@rklucas.co.uk](mailto:paul@rklucas.co.uk) - A percentage of Landlords are withdrawing from the market as a result of increasing government regulation and demands.

## London

Allan Fuller, FRICS, Putney, Allan Fuller Estate Agents, 020 8788 8822, [allanfuller.co.uk](http://allanfuller.co.uk), [allan@allanfuller.co.uk](mailto:allan@allanfuller.co.uk) - August is usually a busy month as graduates start their careers in London, but much less this year indicates a reduction in recruitment due to Brexit. New lettings reduced with few investors buying due to government tax disincentives.

Ben Temple, MRICS, London, Regent Property, 02087439101, [www.regent-property.com](http://www.regent-property.com), [ben@regent-property.com](mailto:ben@regent-property.com) - The letting market has been very busy over the summer and we are seeing rental growth of between 5% and 10% from 2017 levels.

J.J.KING, FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, [www.as-r.co.uk](http://www.as-r.co.uk), [jking@as-r.co.uk](mailto:jking@as-r.co.uk) - A quieter month on the letting of new stock, as relets absorb most of the tenant enquires. Fresh instructions remain thin on the ground.

# Surveyor comments - lettings

J.J.KING, FRICS, Merton LB, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Busy month for management as relets dominate their time. Instruction levels remain low with unrealistic asking rents holding back enquires.

James Gubbins, MRICS, Pimlico, Dauntons, 020 7834 8000, www.dauntons.co.uk, mail@dauntons.co.uk - The usual increase in demand over the summer has improved prices and a lack of stock has meant that tenants are unable to negotiate.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - Demand has been increasing this month but the volume of available of larger properties in particular has meant some rents are softening as tenants flex their muscles!

Jilly Bland, John Collard (MRICS), Wimbledon Village, Robert Holmes & Co, 0208 897 9669, www.robertholmes.co.uk, jilly@robertholmes.co.uk - After a very quiet July, August has been very busy, unseasonally so.

Joanna Fabikun, MRICS, London, Rogba Orinmalade & Co, jojolarame.com - Low supply of 1 bedroom affordable apartments.

Mark Wilson, MRICS, London, Globe Apartments, 020 7034 3435, www.globeapt.com, mark@globeapt.com - Whilst we are still expecting rents to continue to fall, we see a bottom in sight. We need stock from motivated landlords as there are some good enquiries out there.

Mr B K Bhalla, MRICS, HI, CEA, Hounslow, Acrewoods Chartered Surveyors, 02085775733, www.acrewoods.com, enquiries@acrewoods.com - Demand greater for new builds, rather than older properties or converted flats. Landlord needs to be realistic on rents or risk void periods.

Richard Ashaye, MRICS, London, Slough Borough Council, tokash38@hotmail.com - Government measures.

Simon Aldous, MRICS, London, Savills, 02070163861, Savills.co.uk, saldous@savills.com - We are continuing to see rents fall across many sections of prime London, in central London rents have had the largest correction.

Terry Osborne, FRICS, SW1, Tuckerman Residential Ltd, 020 7222 5510, tosborne123@yahoo.com - Brexit

Tom Dogger, MRICS, London, B N Investment Ltd, 020 7590 9055, www.bakkenepetune.com, tdogger@bninvestment.co.uk - If you have high equity in your investment, to mitigate recent tax changes, it looks like the percentage yield for Landlords is set to increase.

Will Barnes Yellowley, AssocRICS, Kensington London, LHH Residential, 02073762286, www.lhhresidential.co.uk, will@lhhresidential.co.uk - With plenty of property to choose from, the rental market continues to be very price sensitive.

William Delaney, AssocRICS, City of London, Lawrence Ward & Co, 02073379600, lawrenceward.co.uk, w.delaney@lawrenceward.co.uk

- Rentals are healthy if client landlords are realistic both in terms of price and maintaining high levels of presentation. The corporate funded relocation of tenants from mainland Europe has been subdued for obvious reasons.

## Scotland

Carolyn Davies, MRICS, Dumfries, Savills, 01387263066, www.savills.co.uk, cmadavies@savills.com - Poor quality property continues to struggle in a tight market, with few enquiries.

Craig Henderson, MRICS, Ayrshire, Graham & Sibbald, 01292 271030, www.g-s.co.uk, craig.henderson@g-s.co.uk - Lettings market remained robust, with steady demand in most sectors.

Fraser Crichton, MRICS, Edinburgh, Dove Davies, 01312283999, www.dovedavies.com, FCrichton@dovedavies.com - There continues to be a shortage of good quality 1 and 2 bedroom flats within central Edinburgh.

Grant Robertson, MRICS, Glasgow, Allied Surveyors, 0141 330 9950 - Low point in the market cycle with low turnover of stock, perhaps due to new tenancy agreements.

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - There is a lack of properties available to let leading to higher rents. Some letting agents are selling their managed portfolios before the new registration regulations come into force in October.

John Brown, FRICS, Edinburgh, John Brown and Company, 07768583919, Jb-uk.com, John.brown@jb-uk.com - Supply of rental stock is reducing, landlords concerns regarding Tenancy Legislation and taxation. Less available to rent. Rents are going up.

John Gell, MRICS, Inverness, Simply Let, 01463 718888, www.simplylet.biz, john.gell@simplylet.biz - Very active market in August, with particularly Raigmore Hospital recruiting professional staff. New investors entering market are moderating rental growth to some extent.

K Bowman, Highlands, Torrances, kjb@torrance-partnership.co.uk - Market fairly good.

Neil Woodhead, FRICS, Inverclyde, Castle Estates, 01475784781, www.castle-estates.co, neil@castle-estates.co - Strong demand for quality properties. Tired and dated properties struggling to compete, creating an oversupply and rent reductions.

## Northern Ireland

Gareth Gibson, FRICS, Belfast, Douglas Huston, 02890683711, www.douglashuston.com, gareth@hustonestateagents.com - Rental market remains strong particularly for high end property. It is noticeable that buy to let investors are not purchasing this summer and this has left a void of buyers in certain locations where first time buyers do not wish to live.

Kirby O'Connor, AssocRICS, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - Rental market is very strong we have a strong student portfolio. Rents are up to £275 a room and not enough of them.

Samuel Dickey, MRICS, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - Rental demand remains high.



# Surveyor contact details

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